

VISITOR Economy

A FIRST STEP TOWARDS TRANSFORMATION



Foundation for Puerto Rico

OCTOBER 2016

President/CEO
Jon Borschow

Chief Operating Officer
CPA Damaris Ocasio

Research and Analysis Director Arnaldo Cruz

Director of Collaborations María "Baby" Jaunarena

Organizational Effectiveness Director Yinet Ocasio

Publication Analysts

Francisco Rivera José Antonio Maes Alexandra Elizalde Juan Gudiño

Editor Alejandro Álvarez Nieves

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FOUNDATION FOR PUERTO RICO

Our organization seeks to discover, link, unleash the island's full potential as an active participant in the world economy. We dream of benefitting from a prosperous Puerto Rico; an island able to harness its potential by maximizing its talent, creativity, tenacity, commitment, and the passion of its people. Our mission is to transform Puerto Rico into a world destination, encouraging sustainable strategies for social and economic development. At the Foundation, we believe that a strong Visitor economy is the most precise strategy for the short term development of Puerto Rico.

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Executives Assoc. of PR (SME)

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- Alejandro Álvarez
- Ricardo Álvarez-Díaz
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 PR Builder's Association
- Sila M. Calderón
- Edward Calvesbert
- Ignacio Canto
- Camille Collazo
- -Antonio Córdova Rivera
- Flavio Cumpiano
- Ramón Daubon
- Veronique Descombe

- Fabián Fejgielman
- Osvaldo Gelabert
- Terestella González Dentón
- Veronika Hernández
- Mari Jo Laborde
- Sandra Levy
- Fernando Lloveras
- Vivian López Llamas
- Mariela Martínez
- Ramón Mellado
- Luzirene Mendoza
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- Aziria Rodríguez
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MESSAGE FROM THE PRESIDENT OF THE BOARD OF DIRECTORS

As easy as 2 plus 2.



Since 2011, Foundation for Puerto Rico has established a vision of what it would mean for the island to have a complete integration into the opportunities of the world market. In order for our economy to grow, it needs to generate new income from sources outside of our geographic space; otherwise, the economy will continue shrinking.

But where will these new incomes come from, within the needed time, and at a scale large enough to save us from the crisis? Our proposal is as simple as 2 plus 2: bring more visitors from all around the world, and prolong their visits. If we increase the amount of visitors by two million, and the length of their visits by 2 days, during a period of five years; we can bring an additional 7 billion dollars to our economy. Likewise, we could create thousands of jobs and entrepreneurship opportunities. It's as simple as 2 plus 2!¹

There is no question that Puerto Rico is dealing with a crisis that is depriving it from its capacity to survive economically. The entire economic sector is bleeding out. The government is bankrupt. Emigration has reached unsustainable levels. Our local companies —both business and social— are struggling, and some of them are closing. The bottom line is that we are living the worst crisis in our recent history. But there are alternatives.

The Foundation is proposing economic development strategies of impact and sustainability, that connect us with a diversity of opportunities the world has to offer. Thus transforming us into a destination for the world to live in, invest, export, study, work, and visit. With our proposals, we can create economic value that will benefit all sectors, and geographies of our socio-economy.

In this document not only have we tried to depict a wide strategic vision for economic development through the visitor economy, but we have also outlined what are the key strategies to achieving this goal. Our aim is to integrate input from different organizations, and associates who are visionaries in order to define the main roles, responsibilities, and actions corresponding to economic and geographic sectors comprising our great Puerto Rican community.

These pages integrate knowledge with unequivocal examples, which we have drawn from researching similar efforts throughout the world, and which we have applied to our local circumstances. Moreover, this document contains ideas, strategies, and examples from local organizations and visionaries. These shed light on important initiatives we are already developing, and which we need to emulate and expand. Let us seize this opportunity to work together to transform Puerto Rico into the island we deserve.

JON BORSCHOW

President of the Board of Directors Foundation for Puerto Rico

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FOUNDATION FOR PUERTO RICO'S PERSPECTIVE ON ECONOMIC DEVELOPMENT



A country's economic development must significantly benefit its population, and creates value throughout its geography. It must also align itself to current tendencies, and global opportunities.

s a foundation, part of our mission is to promote economic-development strategies that completely insert us in the global economy. We believe that by connecting or tapping into the different opportunities the world offers us; we can lure new, significant income that will benefit all the sectors of our socio-economy.

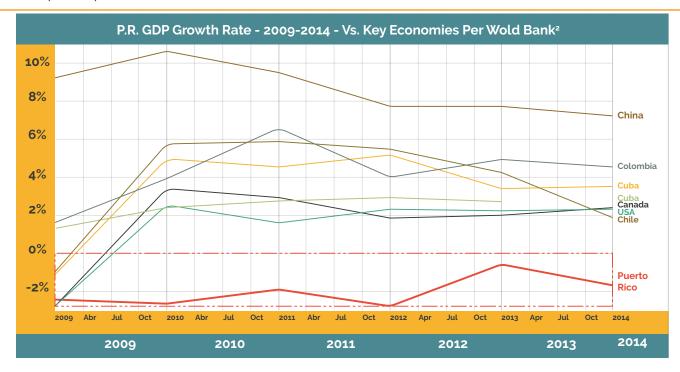
During the past century, Puerto Rico transitioned from poverty to prosperity by harnessing its human capital through manufacturing, and exporting physical goods. The government grew by developing a sophisticated infrastructure to foster economic development. Globalization, a reduction in the privileged access to the American market, high marine-transport costs, and the elimination of federal incentives like Section 936 of the US Internal Revenue Code are reducing opportunities in traditional manufacturing even more.

The size of the local service economy and local consumption decreases with emigration, and the local added-value component has been gradually disappear-

ing with the arrival of multinational corporations, and their powerful supply chains. Construction has been paralyzed due to a shrinking general economy, and the island's depopulation: there is already a surplus in infrastructure in almost all categories.

The government is reduced in its size and budget, but does not increase in productivity. And with the implementation of the PROMESA Act, it will be reduced even more. Several categories in federal funding are at risk of depletion since they depend on a population census.

Business associations and labor guilds are struggling to keep a nonexistent status quo, and their intent is that others suffer the economic collapse. Legislators promote bills in order to protect fostered interests without pondering fiscal consequences and how it affects the national treasury of the economy in general. In the meantime, a web of contradictory laws and regulations that thwart the economy continue to grow each day.



In absence of a wide consensus or agreement regarding a strategic vision for economic development; acknowledged and supported by the government, and non-governmental sectors, as well as in Washington, D.C., which changes the dynamics of our economy; the economic reduction we are experiencing may double by the next decade. Fortunately, an agreement is being reached regarding subjects that require vision and strength. We have to get more sectors interested, in joining the agreement. We have to reach a full agreement where we become a single voice speaking out on the issue, here and in Washington D.C.

At Foundation for Puerto Rico, we have identified several strategies for developing a solvent and thriving economy:

Twenty-first Century Exports: The term not only refers to exporting high added-value (physical) goods—a manufacturing niche that is still active and that we can continue to develop-but also applies to the concept of other services ranging from finances to engineering to consulting; developing and marketing technology, software, and applications to generating digital context; from music to movies. These economic aspects reflect social tendencies, and constitute the largest component of the twenty-first century economy. Fortunately, these do not require importing large volumes of raw materials; nor expensive, bilateral transportation. On the contrary, they harness the human talent we already have in Puerto Rico, along with the entrepreneurship, innovation, research, and capacities for exchanging knowledge. We believe that in a timeframe of 10 to 20 years, this type of non-physical exportation will potentially produce more than \$20 billion in economic activity, and hundreds of thousands of jobs.

Replacing Our Imports: In an economy that imports nearly \$40 billion per year in goods and services, which requires an exterior expenditure of an equivalent amount that we no longer have, reducing imports and/or replacing them with locally produced goods or services becomes an important and inevitable adjustment for our new economic situation. For example, developing a sophisticated agriculture becomes an opportunity for reducing our food imports—which add up to \$8 billion per year—as well as for generating income from abroad by exporting agricultural goods.

The Visitor Economy: The visitor economy is one of the largest-growing industries in the world. According to the World Travel and Tourism Council (WTTC), every year there are 1.2 billion trips from one country to another. The economic activity associated with tourists worldwide amounts to more than \$7 billion. Tourism is already an important element of our local economy. This report shows that economic activity associated with this sector exceeds \$7 billion, and is the only part of the economy that is actually growing. If we prioritize to our economic strategy, the Visitor economy could support an accelerated expansion that may double such activity to \$14 billion in five years3; provided that such an increase in the Visitor economy be large enough and takes place in a period of time short enough to counter the economic contraction we are facing, and creates job opportunities for tens of thousands of people throughout our geography, and in all of our economic sectors.

WHY THE VISITOR ECONOMY?



he Foundation for Puerto Rico has decided to focus our economic efforts in promoting our island as a destination for the world by boosting the expansion of the visitor economy due to its short-term economic impact. Properly executed, this development offers important benefits beyond economic impact. The resources spent by visitors in our economy help maintain and strengthen our physical infrastructure, as well as the government and private sector's essential services affected by recession. This favorably influences the quality of life for all of us residing on the island, including if one considers the loss of human capital as a result of emigration. Due to a positive experience during their visit, each visitor becomes an ambassador of Puerto Rico, restoring and strengthening our image to the world, favoring all dimensions of our economy. Giving priority to making Puerto Rico a desired destination gives us more visibility before the world in all our strategies and negotiations. At Foundation for Puerto Rico, we are

convinced that implementing this strategy as a spearhead for our economic development will produce more immediate and accessible economic benefits.

This document helps us understand the concept of the visitor economy, and why its important to develop, to the largest scale possible, which is crucial for Puerto Rico's economic recovery. This document includes an evaluation of the sector's scenario, and its global and regional tendencies. It establishes comparisons with other countries in order to understand these dynamics throughout the world, and how implementing them may affect our growth opportunities. Likewise, we try to understand and document our current capacities and activities, our functional strategies, and our successful practices in order to propose a way for uniting efforts with such a knowledge, and therefore build a visitor economy large enough to have the results we need and deserve.

WHAT IS VISITOR ECONOMY?

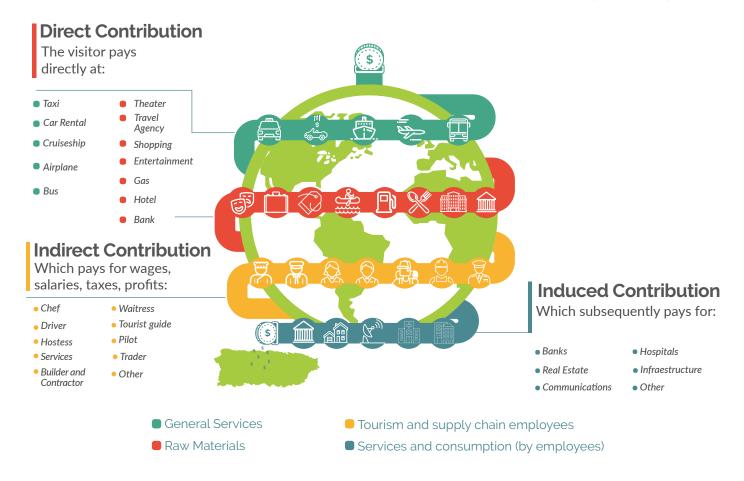


he term tourism is common knowledge, as it is also known that in Puerto Rico it is a sector that has maintained a constant growth pattern even during the last years of recession. The Visitor economy is a concept much broader than tourism. The WTTC⁴ defines it as any direct, indirect, and induced economic activity resulting from visitors' interactions with their

destination. This activity includes direct consumption of goods and services paid by people who visit a destination, activity generated indirectly from supply chains and services to the industry, construction, etc., and additional induced activity from what people who work, directly or indirectly, serving visitors spend in the local economy.

What is the Visitor Economy?

How does a visitor's arrival benefits the country's economy?



In other words, when the number of visitors increases, not only does their direct consumption increase (in hotels, restaurants, transportation, attractions, etc.), but the economic benefit of businesses and providers supporting the tourism industry throughout the entire supply chain such as food, products, maintenance services, equipment, fuel, general services, etc. also increases. Similarly, the economic activity generated by all the employees working in the industry, directly or indirectly, increases when they spend earned money back into the economy by acquiring goods and services.

The economic activity generated by the visitor economy contributes to many different sectors of the economy, beyond tourism. Its impact has a multiplying effect, with a large scale potential, prompted by the visitor, that is distributed throughout the entire economy, and

thus supports the creation of jobs, infrastructure development, and community development. It also offers an important platform for individuals, family groups, small businesses, and even communities; while embarking on different business activities such as cuisine, technology, lodging, etc.—located in different regions of the island, and implemented according to an economic strategy that creates a large ecosystem.

When analyzing the visitor economy's ecosystem, we identified public and private organizations, and the individuals who play a key role in bringing about changes and defining strategies. We also identified those who interact with visitors on a daily basis, as well as those who offer services or products that make it possible for the visitor to enjoy our assets.

A Developing Global Industry

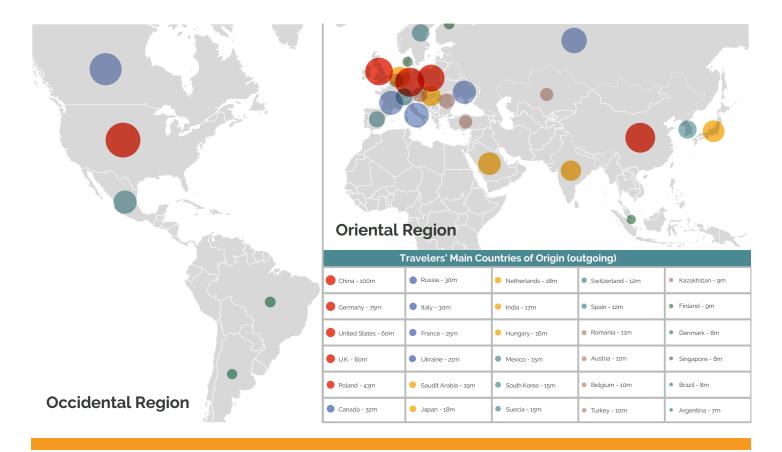
ccording to data from the United Nations World Tourism Organization (UNWTO), in 2015, 1.2 billion people travelled internationally (outside their home countries). At the top of the list of visitors are those from the United States, Germany, and the United Kingdom. These are followed by those who are probably motivated by the economic boom of other countries, such as China and India. Less popular countries whose economies have improved, allowing their citizens to travel at a significant scale, would also be included.

The postindustrial era's globalization of wealth and cultural tendencies have resulted in many changes to the travel industry. Since 1995, billions of people have globally joined the middle class, with a mobility that is constantly rising.

It is important we stay current with the way the world is changing. Not only do we have to know which countries generate the most travelers worldwide, but we must also consider travelers' diversity in nationalities, ethnicities, and generational gaps, as well as



their likes and preferences. Today, travelers are showing a marked trend of seeking new experiences that would allow them to immerse into the environment, and culture of their selected destination. Similarly, technology plays a more fundamental role in their decision-making process on a daily basis. Travelers seek tools that allow them to have a smooth experience, thus promoting the development of more innovative strategies.



The table above shows data from source countries that includes departures of visitors and excursionists (who don't stay overnight) by air, land, and sea. For example, out of the 43 million registered departures in Poland, only 6.3 million correspond to visitors that stayed at least one night.

In order to understand the magnitude of these changes, let's take a specific look at China. One third of its middle class now has a college degree, and the purchasing power of turning this country into the top traveler originator in the world. Today, China constitutes almost 100 million international trips per year.

According to UNWTO projections, by 2016 international trips should increase by approximately 4%. And according to the WTTC the number of international travelers may reach 1.8 billion by 2025. Similarly, the travel industry makes up 10% of the Gross Domestic Product (GDP) at a global level, and generates one out of every eleven jobs, which proves the high economic impact this industry represents.

Category	Country	UNWTO Region	International tourists arrival (2014)	International tourists arrival (2013)	Change % (2013 to 2014)	Change % (2012 to 2013)
01	France	Europe	83.7 million	83.6 million	♦ 0.1	♠ 2
02	United States	Norte America	74.8 million	70 million 🔷 6.8		♦ 5
03	Spain	Europe	65 million	60.7 million	₹ 7.1	♦ 5.6
04	China	Asia	55.6 million	55.5 million	ॐ 0.1	ॐ 3.5
05	Italy	Europe	48.6 million	47.7 million 🔷 1.8		♦ 2.9
06	Turkey	Europe	39.8 million	37.8 million 🔷 5.		♦ 5.9
07	Germany	Europe	33 million	31.5 million	♦ 4.6	☆ 3.7
08	UK	Europe	32.6 million	31.1 million	♦ 5	♦ 6.1
09	Russia	Europe	29.8 million	28.4 million 🔷 5.3		☆ 10.2
10	Mexico	North America	29.1 million	24.2 million	♦ 20.5	☆ 3.2

Source: UNWTO

The Visitor economy is not an industry to be underestimated. Today, large cities such as New York, Paris, Hong Kong, London, and Rome; and some of the most important economies in the world like China, Spain, Japan, Mexico, Brazil, or Australia; consider the visitor economy a priority. They have developed sophisticated

strategies to lure more visitors and prolong their visits. It is important to examine other destinations that are comparable to Puerto Rico; in terms of population, geographical area, and what is offered. In this document, we will try, to the extent possible, to provide examples of the Visitor economy of such destinations. We will also try to identify valuable strategies or practices from other destinations, regardless of whether or not they are comparable in size or population to Puerto Rico.

An important fact that we have identified while researching these destinations is that, despite the value of their assets, no destination has materially advanced in terms of their Visitor economy by accident. On the contrary, these destinations dedicate themselves to add value to their assets, by organizing themselves as a society in order to take advantage of them. In these countries, they clearly focus on the continuity of such efforts. The way they meticulously measure their activity, and the great transparency with which they visualize and monitor progress, recalibrate their strategies and actions based on their findings; is quite evident.

Furthermore, more countries that have historically based their economies on exporting natural resources, manufacturing, technology, and their services are shifting focus to try and reach success with their respective visitor's economies.

Every day, the adoption of the terminology and concept of the Visitor economy is growing. English-speaking countries; from the United Kingdom, Ireland, Australia, New Zealand, Canada, Singapore, and many parts of the US; have taken this to a point where every region, state, province or urban destination is organizing itself based on this concept. Regardless of the extent of the terminology adoption, reformulating tourism in a broader economic context is almost a universal practice.

Our greatest opportunity is precisely the magnitude of the global industry; the great diversity of the countries from which travelers originate from, and the small portion of this market that Puerto Rico actually captures. We can grow to the point where we can change our economic course without being seen as a great competition or threat by other destinations. We simply have to organize ourselves adequately, become better known throughout the world, and we will get the results.













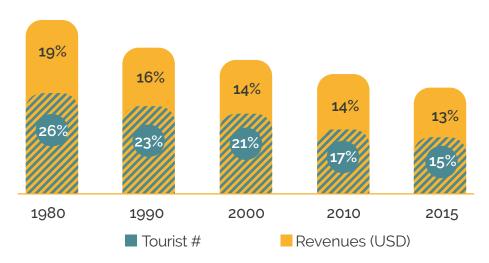
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Puerto Rico's Visitor Economy

Puerto Rico's declining role in the Caribbean

PR as a % of the Caribbean



Cuando el sol y el turismo no es suficiente. Sin Comillas (2015)

very year, Puerto Rico receives a little over 3 million visitors staying on the island, plus 1.4 million that arrive in cruise ships, which only represents 0.3% of global activity. According to WTTC data, during 2014 the tourism industry represented \$7 billion in yearly economic value for our economy, nearly 10% of our GDP. This generated more than 60,000 jobs, directly and indirectly, which constitutes 6% of the actual labor force.

A study done by Foundation for Puerto Rico ("The Visitor economy: from Knowledge to Action") (FPR F. f., 2016), states that in 2014 the Caribbean was visited by a total of 22,446,000 non-residents, visitors. From this total, Puerto Rico received 14%, versus 23% in Dominican Republic, 13% in Cuba, and 9% in Jamaica. Destinations like Cuba and Jamaica are experiencing an increase in visitors. An article published in a digital news platform, Sin Comillas (Pelatti, 2015), notes that the percentage of visitors to the Caribbean who choose to visit Puerto Rico has dropped from 26% in 1980 to only 15% in 2015. If Puerto Rico would have maintained its 26% of visitors to the Caribbean, it would have 5.6 million visitors per year or double its current number.

It is important to highlight that Puerto Rico is among the top four destinations for visitors travelling from the United States. This is partly due to the great amount of those belonging to the Puerto Rican diaspora that come back home to visit family members or to rediscover their heritage. These visitors, along with a comparable number of island residents that visit the USA regularly, represent the largest segment of travelers that arrive at our airports. The fact that there are so many Puerto Ricans coming and going is one of our greatest strengths, since this ensures that the island receives a base amount of tourism activity and flights.

Currently, most visitors come to Puerto Rico not necessarily because the island has been able to spark an interest in them because of the different things we offer, but because of other factors and circumstances. Our visitors comprise several groups, in order of economic impact (FPR F. f., 2016) are:

- Puerto Ricans who have migrated, and others visiting relatives and friends residing on the island, motivated by their personal ties to the island.
- Travelers from the East Coast of the US looking for a sunny haven with warm beaches; mostly during the winter. They are motivated by convenience, proximity to the destination, or economic accessibility.
- Cruise-ship travelers who stay overnight in order to board the vessel. They are mainly driven by a Caribbean

itinerary in which Puerto Rico is the starting point.

- Individual business travelers, who are mainly driven by the commercial activity they will partake on the island.
- Business trips for groups or conventions, motivated by advertising, convenience, and price.

If we consider that most of these travelers tend to choose us as a destination based on factors such as convenience, proximity or economical accessibility, we can clearly see the size of the opportunity that lies in front of us. We should work towards not letting this be pure luck, to be discovered as a destination in an arbitrary manner due to family ties or due to the convenience of an accessible flight or because of a cheaper travel package. We should strive for travelers to choose us due to the enticement of our stories and the desire to explore Puerto Rico even more.

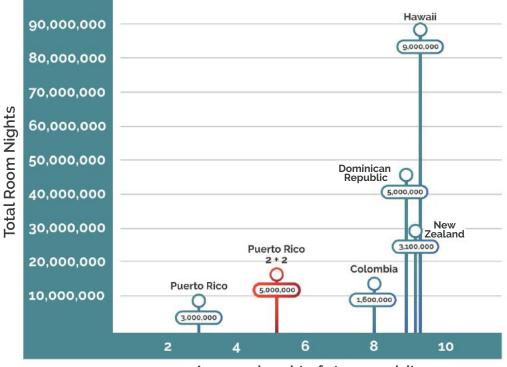
According to the Puerto Rico Tourism Company, in 2014 the average visit to Puerto Rico lasted 2.6 days (IEPR, 2016). The average visit for international tourists at our neighbors from the Dominican Republic was over 8 days. Similar destinations like Hawaii and New Zealand average around 9 days. This clearly indicates

that our visitors are planning stays which do not consider the diversity of experiences they can enjoy in our island. If we were to increase the length of the stay by just two days, the potential impact this would represent for our economy would be billions of extra dollars.

Establishing a visitor economy as a main priority for economic development by engaging in innovative strategies would surely translate to a significant increase in the number of visitors and in the length of their stays. This in turn would produce a positive impact on indicators associated with sources of income and economic growth.

Keeping new global tendencies in mind, it is necessary that we consolidate and visualize our varied offer to the visitor. We must also maximize and highlight our assets to the world, particularly focusing on those which provide travelers a unique experience at our destination. Therefore, we suggest developing a strategic vision that promotes Puerto Rico as much more than an escape destination with beautiful beaches, where the traveler can flee from winter weather. We must also develop tools that would advertise the variety of possible experiences that our history, architecture, and authentic culture have to offer. It's a complete package of everything we can offer. From fine cuisine to fine arts, our cities and towns, our rural environment to our natural landscapes, is what will make our island a favored destination to the world.





Average lenght of stay per visitor

A Large Market that Doesn't Know about Puerto Rico



Many of the favored tourist destinations in the world such as Hawaii, Paris, Venice; are well-known all over the planet. Their visitors are proof of such diversity in terms of point of origin.

As we have previously mentioned, over 90% of Puerto Rico's current visitors come from traditional markets, such as the East Coast of the US. A large portion of the rest of the planet does not know about us as a destination. This is a great opportunity for Puerto Rico. By making ourselves known, we can attract a significant number of travelers from non-traditional points of origin which do not normally see us as a destination.

Without a doubt, we have great potential for developing our Visitor economy by integrating everything we have to offer. We can maximize our unique assets' potential, and redirect new and innovative advertising efforts in non-traditional markets. This way, not

only will we increase the number of visitors, but also dramatically augment the economic impact generated by the Visitor economy by offering more diverse experiences to remote markets, and extended stays, in comparison to our current averages.

Although it may seem contradictory, our economic crisis has placed us before the eyes of the world. Many Europeans who used to confuse Puerto Rico with Costa Rica are now clear. People from Asia who had never heard of us, now know our name. Even South Americans know us a little better. Strangely enough, dozens of millions of people within the continental US are paying attention to Puerto Rico. This is our moment. It is time to capitalizing on all the publicity this recent interest has provoked from the international media. We can stop being the island that wavers in juggling a crisis, and become a destination that provides a chance for physical and spiritual renovation to all those who come and visit.

An Economic Opportunity for Puerto Rico



ccording to WTTC projections, strictly based on tendencies and adjustments due to inflation; Puerto Rico's Visitor economy should increase from 7 billion dollars to 10 billion in 2025, provided that the island maintains its historic growth pattern of only 2.5% (WTTC, 2015). But if we consider for a moment that the island's participation in the global market is a mere 0.3%, it is clear that there is large room for improvement. With precise strategies, that sell our experiences and connect them with our visitors' interests, motivations, and aspirations; we can certainly say that Puerto Rico will capture a small, additional portion of such a large market, and we will grow fast.

At Foundation for Puerto Rico we propose that in five years there be an increase in the number of visitors staying overnight from 3 to 5 million; as well as an augment in the length of their stay from 2.6 to 4.8 days. We have presented our case with the phrase, "as simple as 2 + 2." In other words, add the number of visitors by 2 million plus the length of their stays

by 2 days. To achieve this, it is necessary to design specific, intertwined strategies, that go hand in hand with the level of global tendencies, and the preferences of future visitors. These have to be kept up to date, and quickly adjusted to guarantee the project's success. It is also necessary that these strategies make use of the technology that facilitate advertising experiences that promote exploring every corner of our geography, and maximize this benefit and its impact; until the economic path of our country changes. If we reach our goal, the value of our Visitor economy may raise to \$14 billion per year.

If we maintain this growth pattern until 2025, we may receive 8.5 million visitors per year. Extending the length of their stay to an average of 4.8 days may result in a Visitor economy of nearly 20 billion dollars. This is not an easy task. But it is achievable if we maximize our capabilities; which will result in a successful and prosperous Puerto Rico. Even if we fall short, the transforming effect of the achieved growth will be crucial for stabilizing the island.

An Accessible and Desired Destination

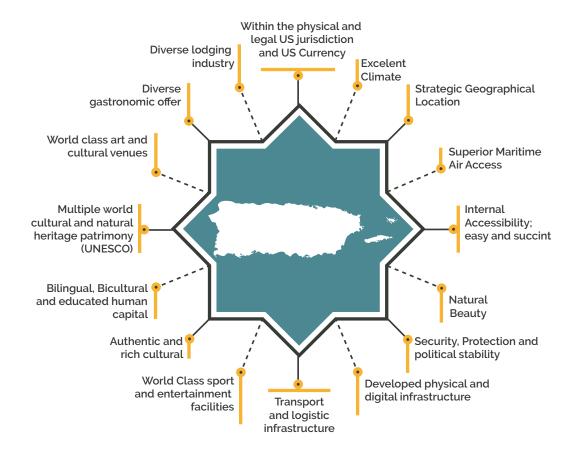
ur vision is that Puerto Rico become a unique, desired, and accessible destination; inspiring millions of people from all over the world to visit. And for those who already have, to share their extraordinary experiences with their friends and loved ones, and come back.

By desired destination we mean a place that the potential visitor would love to go to; there is an emotional preference that doesn't consider expenses. The visitor feels part of a combination of unique experiences that inspire, thrill, and fill him or her with satisfaction. Also, once at the destination, the traveler feels that the actual experiences exceed his or her expectations.

The island has assets and resources that allow us to create a wide network of authentic experiences. These range from our national resources (that go way beyond sun and beaches), to our history, arts, culture, and fine cuisine. They are all available in a compact, convenient, and accessible destination; both in size and moneywise, equipped with state-of-the-art digital and physical infrastructure, among other advantages.

For us to become a desired destination, that at the same time is accessible and convenient, requires the integration and mobilization of these assets to create synergies and unique comparative advantages, which would result in a complete and diverse offering. This would clearly differentiate us from other destinations. This requires us to strategically interconnect the advantages, opportunities and available assets through the creation of networks and collaborations that generate the necessary conditions to ensure the quality of a vast portfolio of visitor experiences.

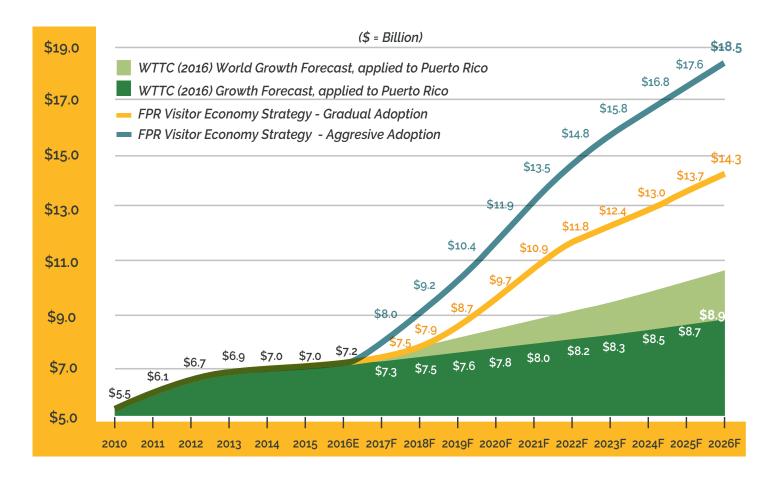
Puerto Rico's Actives and Resources



Some of the resources and assets that make Puerto Rico a complete destination

The Greatest, Diverse, and Economically Important Choice

Puerto Rico Visitor Economy Growth Potential

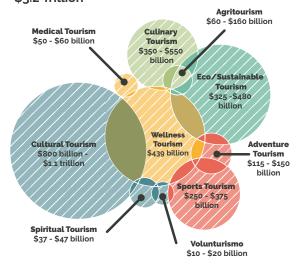


Developing a Visitor economy is a strategy that brings the best opportunities for triggering and transforming Puerto Rico's development during the next five to ten years. The economic activity generated by the arrival of more visitors, the increase in the length of their stays, the money that comes with it, and the development of a variety of offers fosters the creation of tens of thousands of additional jobs⁶ in the economy by 2025. Such an injection of economic activity may bring the necessary resources to end the recession, while allowing us to continue updating our services and physical and digital infrastructure, and improving our people's quality of life. This strategy is not subtractive but complementary, and even synergic with other strategies our Foundation

has for integrating Puerto Rico into the global economy.

It is a historical fact that in the past Puerto Rico has marketed itself as a sunny destination with beaches. This depiction was logical at a time when there were less alternatives for travelers. But today, in the twenty-first century, we are forced to compete with multiple destinations that have similar attractions, and most of the market prefers the lowest cost possible. Now Puerto Rico can, and must position itself as a unique, desired global destination; increasing its growth and participation in the global travel industry, in order to boost the economic benefit these visitors generate due to their interactions.

Global Tourism Industry \$3,2 Trillion



© Global Wellness Institute. Originally published in "The Global Wellness Tourism Economy", 2013.

According to data from SRI International (Institute, 2014), out of the total world economic activity, which amounts to over \$7 billion, associated with the Visitor economy; more than half derives from non-traditional tourism niches. Out of these, cultural tourism, gastronomic tourism, ecological tourism, and wellness tourism comprise more than half of the activity. Some of these niches or segments include:



The Visitor economy represents opportunities for Puerto Rico that go beyond the traditional tourism of visiting the beach, "garita" or sentry box, and hotel pools. We have to broaden our perspective of the Visitor economy, so that it considers our strategic advantages and our key assets; in order to develop new components of tourist activity. We are referring to other categories of tourism such as medical tourism, wellness,

academic, business, artistic and cultural, gastronomic, agricultural, religious, ecotourism etc. Let's lure people who are participating in professional, literary, music, and artistic events, or those who just want to spend the entire winter here or retire.



New Zealand started its "NZ Tourism 2025" in early 2014. This addresses all sectors of their Visitor economy, and stands out because of its emphasis on the visitor's experience, collaboration between organizations and regions, and because of the meticulous figures they keep. This country developed strategies with precise goals; taking advantage of, and even improving, all data available. They used collaborations as a tool for maximizing opportunities. Their goal is to add value by offering an unparalleled experience. They increase economic impact by identifying opportunities for generating off season demand, by promoting that visitors disperse throughout the entire geographical area, by improving physical and digital connections in their destinations and regions. In a single year they have been able to extend their visitors' stays and augment the number of visitors, resulting in an additional 17% in direct visitor spending.

By not visualizing our diversified offer; we underuse our national resources, specifically the cultural ones, and at the same time disregard the extraordinary potential from local and community offers and initiatives throughout the island. Giving visitors a wide range of things to do encourages them to extend the length of their stays, taking them to different regions, and increasing their participation in local activities; improving their experience and augmenting their economic contribution.

In a world where technology access is growing in great strides, it is crucial to incorporate technological strategies to position the destination and improve the quality of experience; so that our message is placed at an inspiration point within the traveler's cycle that stays with potential and actual travelers throughout their journey. This would be from selecting their destination, planning, arrival, and experience, to the trip back home. This requires a combination of several factors which range from improving the visibility of our experiences, to ensuring an excellent service which inspires a great number of visitors to explore Puerto Rico.

The Visitor's Experience



Puerto Rico needs to maximize the impact of the Visitor economy by designing an authentic, geographically diverse experience for the visitor. This dynamic creates ample opportunities of participation for Puerto Ricans from all sectors and with all skills, by developing offers with multiple cultural and recreational dimensions, etc.

Our assets, available throughout the entire island, provide an excellent opportunity to create an encompassing package that attracts visitors from all over the world. Our natural, cultural, and geographical diversity allow for Puerto Rico to become a destination capable of hosting people and organizations that are looking for particular experiences and conditions; ranging from adventures, and extreme sports; to infrastructure for hosting conventions and international events.

The world market associated with the visitor economy has been experiencing new significant tendencies. Visitors no longer limit themselves to looking for beautiful landscapes and comfortable facilities alone. The search for and gathering of experiences has become a determining factor, and an essential element when it comes to choosing a destination and planning a visit. Getting involved in what is happening locally; such as fine cuisine, cultural exchange, traditions; as well as also visiting less popular places, that are more unique locations, comes across in a desire that surpasses traditional offers of most destinations. This is what the actual market demands.

To reach our highest potential, it's essential that we leverage innovation in technological advances to develop strategies that bring together these experiences and showcase them to the world. We need to become the destination that takes advantage of all of its assets and strategically positions them to inspire travelers with unique and memorable experiences across all of our geography, taking advantage of innovative tools that benefit all communities in Puerto Rico.



Opportunities and Priorities for developing Puerto Rico's visitor economy



n the economic situation we are living in, we cannot afford to wait. It is necessary that we immediately begin to benefit from the opportunities that the Visitor economy provides as an economic development strategy. At the Foundation for Puerto Rico, we have identified five main areas which we must work on collectively in order to achieve an accelerated development of the visitor economy. Among these are timely strategies that may be carried out, and non-existent initiatives than can be both enhanced and expanded:

Creating Networks and Alliances: working together—with public and private institutions to providers and communities—to develop alliances that allow us to build a strong ecosystem, and present an integrated offer to the world.

Marketing Ourselves to the World: attracting visitors and extending their stays by using the most advanced digital strategies; visualizing and projecting to the world a wide range of unique experiences that visitors may experience in every corner of our island and

that attract the attention of visitors with the most diverse preferences.

Maximizing the Experience: developing innovative tools, and the necessary capability as a society and industry to tend to visitors, and consistently ensure excellent experiences.

Measuring to Improve: measuring and evaluating results; making sure that we do not lose our way; keeping high standards on every level, and swiftly carrying out the necessary adjustments, according to conditions or tendencies.

Changing Mentalities: understanding our opportunities and roles, to get everyone to commit to transforming into proactive agents, and transforming Puerto Rico into a desired destination; generating economic activity to all our geography by optimizing our assets and innovation.



In order to maximize and enhance these opportunities and priorities, we have to visualize them in continuous interaction. It is imperative that they all come together harmoniously in order to develop and implement a successful economic strategy. By integrating them, we will build a strong ecosystem; that will allow us to offer complete, sophisticated, and specialized experiences. This will turn us into a different and memorable destination, attracting the maximum number of visitors with a maximum length of stay.

In the second part of this document, we will begin with a presentation of the knowledge we have acquired from our research. We will include examples from around the world, and our own surroundings that are relevant to designing our strategies. We will include ideas and proposals originating from Foundation for Puerto Rico's research, and from input by organizations and visionaries committed to Puerto Rico's economic development. This is a dynamic document that aims to include more strategies and ideas, as they emerge or are identified. Likewise, it will require updates to keep up with the changes and tendencies of our environment and in the world.

We do not intend for this document to become a comprehensive inventory of each and every one of Puerto Rico's actual tourism sectors or areas. Instead we will highlight the key elements that we believe should be developed or strengthened in order to strategically position ourselves. These elements, which we have identified in order to enhance the impact of the visitor economy, seek to open a dialogue, and generate ideas and initiatives that lead us to the full development that we at Foundation for Puerto Rico strongly believe can be achieved. But we need to work together in order to reach this goal.

Finally, in order to reap the fruits of these initiatives, every economic strategy must be carried out rigorously, consistently, and coherently if they are to be successful. This cannot be achieved by a single organization. This is why we propose to convene every organization and visionary leader to work collectively to define and take the necessary steps. Together we should define strategic actions, available resources, roles and responsibilities, as well as the tools we will use for measuring progress.

Creating Networks and Alliances



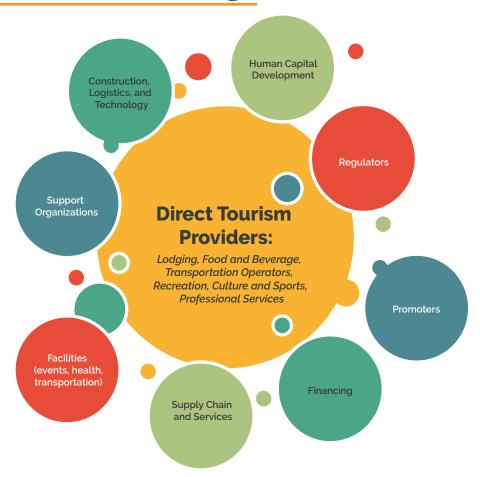
United to Take Action

The must think and act differently in order to transform Puerto Rico into a destination for the world, in order to change our economic path and restore prosperity to our island. It also demands for us to understand the opportunity the Visitor economy gives us. We should give priority to it, and develop a new perspective that forces us to work together in order to make of Puerto Rico a destination that many want to visit.

This responsibility requires the integration of many sources' efforts. Individualist dynamics of those who insist on developing particular visions will only serve in maintaining the status quo. In order to reach the goals that benefit everyone, it is essential to align and integrate all of the country's resources.

Creating networks and alliances, following a strategic framework is necessary to position Puerto Rico as a destination capable of offering a set of unique, integrated experiences. We need to involve all the stakeholders that play a role or participate, directly or indirectly, in the chain of activities and services that originate from the moment the visitor arrives to his or her departure. This collective effort results in a shared mission, and materializes into a common benefit.

Knowing our Surroundings



n addition to the natural and privileged cultural resources, and an excellent physical and digital infrastructure; Puerto Rico has a number of important organizations that are part of the tourism industry. It is crucial to identify the components of the ecosystem of our visitor economy. This is not limited to those who comprise the tourism industry. But it also includes those who provide support. We have to understand their actual roles, and the market segment or categories in which they are involved. We have to accurately identify, according to strategic and functional criteria, the key stakeholders, public and private organizations, and individuals that have a substantial role in the ecosystem; and have the power to bring about change and define strategies. These leading organizations can mobilize the ecosystem so that it works as an integrated engine, propelling and accelerating economic development by following the same vision.

Moreover, this process requires identifying, training, and eventually visualizing individual providers that offer or support unique, competitive, and satisfying experiences that project us to the world market; and

that with their joint contribution bolster a significant increase in the number of visitors. The integration of all of these elements in a strong ecosystem promotes a more complete and geographically comprehensive offer. It also allows for overcoming challenges and obstacles within the chain of opportunities, products, and services associated with the visitor economy. These links, alliances, and networks allow us to effectively develop and integrate our offer.

This set of strategic stakeholders and service providers have significant capabilities and strengths that may be harnessed into a new strategic framework that organizes them into an integrated ecosystem with well defined, and aligned roles and responsibilities. Strategically visualizing all components as part of a comprehensive and coherent entity enables a better alignment of their capabilities to design strategies, and carry out initiatives. This element is the key to offering visitors an excellent experience, that begins before their arrival to the island, continues throughout their stay, and ends with their return home; full of memorable experiences.

Let's Work Together

ur current financial situation requires that we take critical actions that change our path. Resources are increasingly limited, affecting our individual performance ability. Obtaining the results our economy needs requires we act differently, combine efforts and resources for a common goal, and share a vision that sets aside past differences that have prevented us from reaching our highest potential.

Alliance for reaching our maximum potential

These combined efforts must be arranged and directed towards actions that clearly define and communicate their functions and expectations. Calling upon this coalition enables us to design a joint agenda with defined objectives, goals, and actions.

Strategic Agreements: The expertise, competence, and functions of the different members of the coalition give way to envision the different perspectives, resources, opportunities, and challenges that the Visitor economy represents. The coalition must reach consensus, and define clear and achievable plans. It should communicate a single vision, and strategies shared to achieve goals. These strategies must define the responsibilities and resources that are necessary for their effective execution.

Differentiating Roles: Integrating strategic stakeholders helps define their corresponding roles; according to their area of expertise. It also helps take into account our current and future necessities, which avoids duplicating efforts, and maintains the necessary focus to reach our goals.

Defining Collaborative Projects: It is fundamental that actions, proposals, and collaborative projects emerge through which concrete objectives are achieved. Joining efforts, and working in coordination allows us the necessary human and economic resources to achieve our common goals.

Communicating our Actions to the Community: The success of this strategy also depends on the levels of inclusion, transparency, and accountability. Common agendas and concrete actions must be made public. Communication channels between civil and commercial communities must be kept permanently open⁸.

Integrating Public-Private Efforts: The coalition must move beyond traditional concepts that divide public and private actions. It is crucial to achieve a joint effort among the several government agencies associated with the industry, these agencies and private organizations, and amongst private organizations.



In England, transversal task forces were created; comprised of leaders from all dimensions of the visitor economy to develop action plans that would be implemented throughout the industry in order to reach outlined goals. These plans include prioritized areas, agreed upon by all, and they give details of the actions and responsibilities of every stakeholder involved. The initial topics of strategic marketing, rural tourism, modernization, meet and greet, business tourism, market intelligence, destination management, etc.; were integrated with other topics from groups that harnessed their strengths and experiences in every area. These plans composed dynamic documents, which were subject to constant revision and monitoring in order to assess their progress. These task-force contributions were made available throughout the entire industry.

England, 2011

TOURISM 2020

Achieving Australia's Tourism potential

Tourism 2020's goal is to increase tourism spending by up to A\$140 billion

One of the main factors contributing to Australia's Strategic Tourism Plan in 2011 was the strategic integration of government, regional, and private industry leaders; by establishing roles and responsibilities that seek to advance established strategies, and the development of task forces for specific topics with the mission of finding a solution to the challenges that have been identified. One of their mayor successes was achieving the integration of all their regions into one single, common strategy and vision, both in writing and in actions, resulting in a union of economic resources for designing and launching important projects, such as their digital data base that facilitates their offer's visibility and improve their measuring and monitoring systems, among others.

Network Providers Integrating the Offer

The creation of networks and collaborations allows us to present visitors with an integrated offer that facilitates and promotes a unique, successful experience. In order to achieve this, it is necessary to integrate all the services that visitors may need during their stay; including lodging, fine cuisine, transportation, attractions, etc.

Identifying and Linking the Local Offer: It is essential to highlight and visualize the assets that allow us to offer unique experiences which enhance local offers, and develop niches with specific offers for visitors' preferences. By identifying, visualizing, and specializing our offer we can develop new businesses, sustain and maximize the existing ones, and offer a variety of agents the opportunity of becoming a part of the chain of goods and services.

Promoting Dynamic Integration: Creating networks among providers, by integrating multiple roles and functions, generates a cohesion that allows them to stop looking at themselves as competition. Instead they support each other, and create experiences that would otherwise divide and weaken the offer. It is necessary to foster a permanent educational campaign that highlights the opportunities generated by collaborating efforts. For example, experiences that combine lodging, local restaurants, attractions, transportation and digital tools.

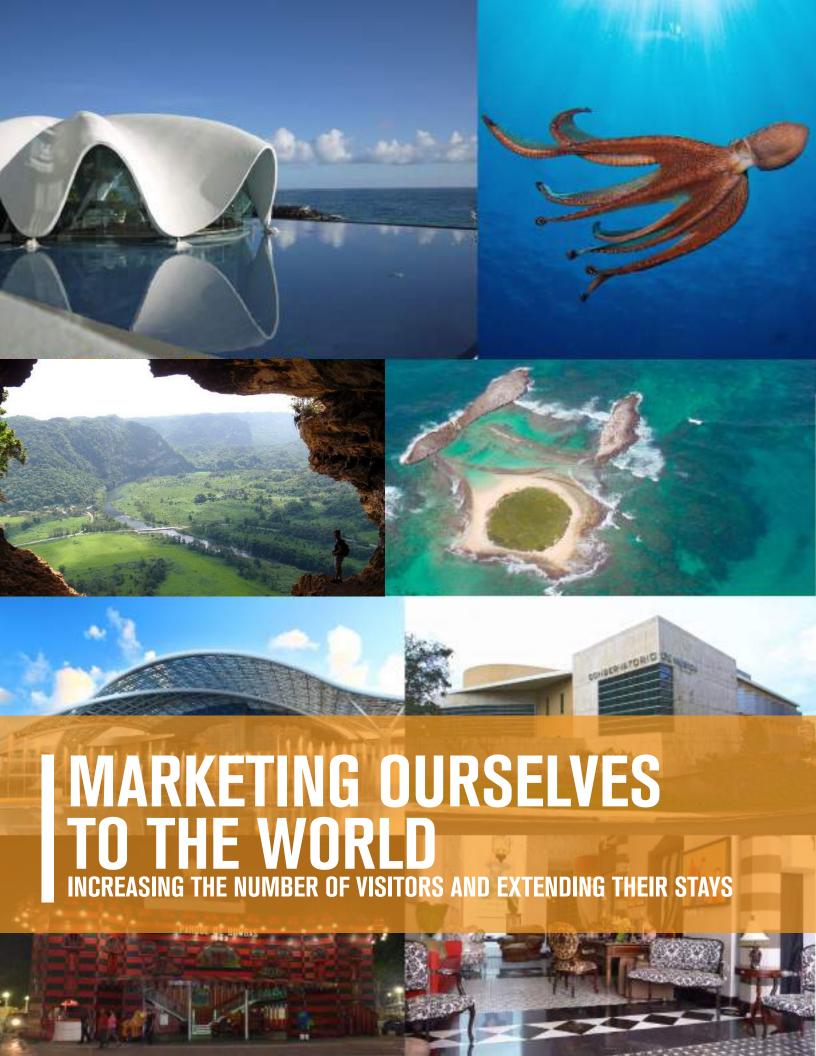
Specialized Networks: Presenting an attractive, and efficient offer may require that providers organize themselves in specialized networks that facilitate particular experiences that go beyond those they can develop individually; such as culinary, cultural, and artistic offers; networks of non-hotel accommodations, etc. These networks can also provide support services to such providers or their clients by allowing them to access or share resources such as knowledge, tools, visibility platforms, and other services.



The Ruta de la Longaniza or "Sausage Route" is a culinary offer that allows visitors to enjoy both our flavor, and natural beauty. In this example, 15 restaurants came together, offering different dishes that feature sausage. These restaurants joined efforts to create a different, fun concept which, if marketed properly, has the potential to attract visitors to the central area of the island. Let's imagine visitors enjoying this route, integrating to their journey other tourist offers beyond the cuisine. In order to make this route's integrated offer known, a website was created. This allows visitors to identify participating restaurants, and see images of dishes featuring sausage at the different locations.



Paris developed innovative products to provide a vast offer to its visitors. These products include luggage storage in allied hotels (with different places of delivery) for travelers with only a few hours to see the city; thus having more time to enjoy the experience offers. Other complementary services are reducing fees at partner hotels and coordinating transportation services, among other. Other products are providing the tools through which residents living near lodgings meet and greet, and connect visitors with the city. These partnerships allow multiple providers offering new, specialized services that tend to the needs of different visitors' profiles to connect.



Becoming a Desired Destination





ifty years ago, tourists typically took their vacation as a time for rest. If they took a trip, they would usually rest at another geographic location. Usually this was during winter; to enjoy a warmer climate. These tourists had more limited expectations. Their daily and nightly activities were comprised of beaches, pools, food, and musical entertainment; which would tend to focus on the hotels where they stayed. They would probably also go out on group tours to the location's historic or scenic sites.

Many destinations organized themselves according to this model. This resulted in "all-inclusive" packages located all throughout our region, and the world. Examples are Cancun, the Mayan Riviera in Mexico, Varadero in Cuba, Montego Bay in Jamaica, and Punta Cana in the Dominican Republic, Costa del Sol in Spain, the Red Sea in Egypt, and Phuket in Thailand. The cruise-ship industry is a mobile, aquatic version of this very concept.

Today, tourists may choose from hundreds of beachand-sun options for a vacation. As long as Puerto Rico intends to continue competing as one more of the similar destinations its industry revenue will hardly grow or improve. Today visitors seek destinations that satisfy them at many different levels. They want memorable experiences, the kind that are forever remembered, and spark interesting conversations. Choosing a destination goes beyond economic factors. It has to do with fulfilling visitors' expectations, and inviting them to dream about all the things they can experience there.

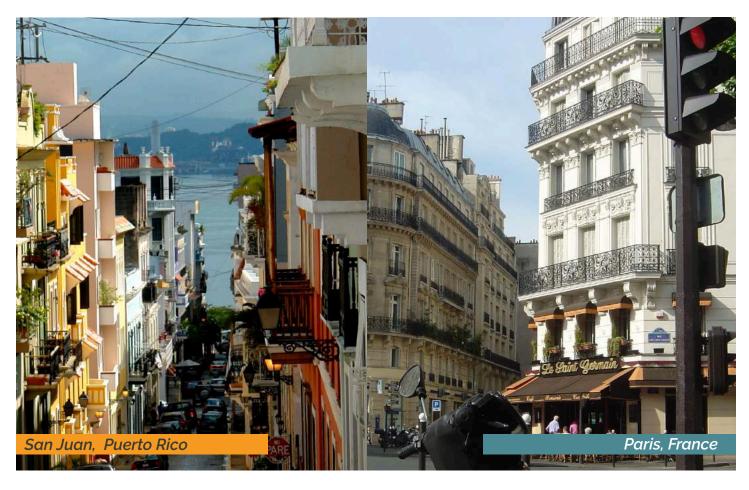
Hawaii invites potential visitors to firstly dream, and then arrive there to fulfill their dreams. Some destinations rely on the distinction of being identified as a destination which people dream of visiting at some point in their lives. These places are famous for being filled with stories and narratives that trigger a powerful anticipation and point to unique experiences.

Some of these privileged destinations that most people dream of visiting like Paris, London, Machu Picchu, Hawaii, etc., have a mystical aura about them, a romantic nuance that defines them. This is why they are known for their culture, history, architecture and natural beauty... In a nutshell, a set of characteristics that sets them apart from other destinations.



The fresh, floral air energizes you. The warm, tranquil waters refresh you. The breathtaking, natural beauty renews you. Look around. There's no place on earth like Hawaii. Whether you're a new visitor or returning, our six unique islands offer distinct experiences that will entice any traveler. We warmly invite you to explore our islands and discover your ideal travel experience.

Welcome message, Hawaii Tourism Authority publicity page: gohawaii.com



Let's look at Paris, a destination that many dream of visiting. What makes Paris different from other cities in Europe that also have art, museums, cafes, music, and historic and colorful streets? Most of its attraction has a mysticism about it. The romantic aura appeals to our emotions, and creates an interest of knowing and living this experience first-hand.

Like Paris, Puerto Rico has all the ingredients for becoming a desired destination. Puerto Rico has the perfect climate, natural beauty, history, architecture, music, fine cuisine; an authentic, vibrant, and bilingual culture. The island has easy access because it has an optimal geographic location, and excellent air and maritime routes. Its physical and digital infrastructure, along with its sophisticated and potential services, allow the island to tend to a large volume of visitors; without affecting their experience or that of its residents. Puerto Rico needs to combine these diverse ingredients into a single offer that appeals to the po-

tential visitors' emotions; so that they dream of visiting us and coming back.

In order to increase the number of visitors that come to Puerto Rico, people need to feel an excitement for visiting us; let themselves be captivated by romance, adventure, and an emotional appetite which they can experience in our land. It's all about placing Puerto Rico and its experiences on a list of places that people want to visit at least once in their lifetime. This is clearly a goal that will not be reached overnight, but we have all the necessary tools to achieve it.

"A destination may pass from being a potential tourist destination to becoming an aspirational destination when the potential traveler not only knows what it has to offer and believes or is persuaded into believing that it is worth visiting, but also when that place becomes emotionally attractive."

-Howie, 2003

Appealing to Travelers with Different Preferences

The global tourism industry is highly competitive, which is why inspiring potential visitors requires us to present ourselves as a destination that integrates experiences appealing to personal and particular needs.

Sunny beaches will never cease to attract a wide range of visitors. But it no longer differentiates us from other destinations that rely on similar offers. In order to stand out in such a competitive market, and guarantee that we become an attractive destination for travelers from around the world, we must appeal to their different preferences by creatively and innovatively communicating our diversity of experiences. This combination of offers must be varied, and motivate exploring geographically remote areas. We must also appeal to the interests of groups and very diverse types of travelers by customizing their preferences.

When we talk about an offer that appeals to diverse experiences we are referring to a combination of aspects that range from natural resources, fine cuisine, culture, arts, history, sports, adventures and festivals, among others. The unique characteristics of our andpeople, and our great cultural diversity maximize such experiences. We have to spark an arousal in the mind of potential visitors so that they can visualize themselves within this set of experiences; as they clearly understand that all these experiences are readily accessible in a compact destination.

We must take full advantage of our different and unique offer not only to increase the number of visitors, but also, and even more important; extending the length of their stay. It is important to point out that people prolong their visits when they explore more of our geography! Our island cannot be explored in less than a week. The combination of all of these elements will attract the economic benefits we want.

Travelers' types of preference

Sun and beach	Health and wellness	Education	Achievement	
Ecotourism	Agrotourism	Fine cuisine	Hiking	
Nature	Architecture	Foodies	Dancing	
Running	Sports Tourism	Religious Tourism	Science	
Poetry	Literature	Fine Arts	Technology	
Film Festivals	Arts and Crafts	History	Culture	
Cafes	Memorabilia	Art Galleries	Music Stores	
Latin Music	Rap/Hip Hop	Jazz	Classical Music	
Salsa	Latin Dance Modern Dance		Ballet	
Fishing	Diving	Mountain Climbing	Zip lines	
Yachts	Cruise Ships	Winter Sojourn	Spring Break	
Water Sports	Car Racing	Bike Riding	Motorcycling	



Inspiring Potential Visitors

The **traveler's cycle** is a set of activities that are associated with a trip. It begins when the potential visitors consider taking a trip. They take into account several information sources that spark a **yearning or desire** to visit a place. This motivates them to look for more **information** about possible destinations. Once a potential visitor chooses a place to go to, he or she **plans** and considers the economic resources for completing their **reservation**, traveling to the destination, and **exploring** it. The cycle ends when visitors **share** their experience with others, and possibly inspire them to live the same experience.

In the past, potential travelers depended on printed material in magazines and catalogues, and on the personal assistance of travel agents, and other intermediaries in order to start the cycle. Today, the traveler's cycle has been significantly affected by the lack of intermediaries which has been brought on by technological advances. Users find the most updated information on the internet; where they can research, compare places, evaluate other travelers' opinions, design itineraries, and complete their reservations. During the trip, mobile devices guide them and help identify the best routes, and how to get there. Travelers also save their pictures in these devices, and share them in real time with relatives and friends who follow them on social media, on their day by day trip; without having to wait for the visitors to return home.

For Puerto Rico, the key lies in incorporating the stories and marketing efforts during the inspiration point of the traveler's cycle, that very moment that precedes the decision-making process. To achieve this, we must use technological tools that allow us to know in advance the interest of potential visitors; helping us to customize their experience.

Furthermore, we must place our authentic, creative content by using digital strategies that make it visible to millions. We have to make sure that our offer is available in several principal languages, in all travel platforms used by potential visitors for planning and reserving.

Travelers' Diagram9





In recent years, search engines like Google have modified their algorithms to focus on users' preference and search intentions, instead of on words alone. Today, people use complicated phrases or sentences while searching on the internet, and add qualitative elements in order to define their preference. These key words serve as a starting point for a more sophisticated process. Applying these algorithms to tourism advertising is essential. These have become so sophisticated to the point of analyzing semantics and search history to interpret and design profiles. These analytical processes must consider not just potential travelers' key words, and what they choose, but also their preferred media (articles, images, video) in order to clearly understand the communication channels that inspire them most.

- José Truchado, 2016



Social media users have become one of the most important resources for positioning a destination. The content obtained from users allow us to reach more people, without paying for it. A popular strategy is creating contests and prizes for a destination's published and shared content using Instagram, Twitter, Facebook, etc. Depending on the market, we may increase brand exposure without investing large amounts of money in marketing. For example, in Hawaii's case, their Instagram campaign, **#LetHawaiihappen** takes advantage of influential people, ambassadors, and general users sharing their experiences on the different islands, with a price of \$5,000 at the end of the campaign. They managed to generate over 100 thousand posts, and reach over 54% of US travelers. This resulted in 65% of the people who saw the campaign said they would visit Hawaii within the next two years. The content generated by the campaign will be shown on the different channels of their Tourism Agency to inspire visitors to live their own experience.

Meeting Potential Visitors

Inspiring our potential visitors requires us knowing where they come from, what are their tastes and preferences, keeping up with global trends, and considering them in all of our strategies. It is important to highlight the large diversity of visitor-originating points and their countries' culture. Considering all these aspects, we must develop the resources and tools that facilitate visitors knowing, aspiring, and visiting our destination. And that during their visit we provide all the necessary assistance that enables them to explore the island; feeling free, confident, and taken care of.

Let's begin with where visitors come from. According to the World Bank, the leading countries in travelling abroad are China, the US, Germany, and the United Kingdom. According to the UNWTO, in addition to these are Russia, France, and Canada; as countries with the highest travel expenditures (UNWTO, 2015). It is important to establish marketing strategies addressing those countries that can provide a large growth potential for our destination.

Range	International Tourism Expenditure (US\$ Billion)		Local Currencies Change (%)		Market Share (%)	Population (million)	Expenditure per capita (USD)
	2013	2014 [*]	13/12	14*/13	2014*	2014	2014*
China	128.6	164.9	23.8	27.1	13.2	1,368	121
United States	104.1	110.8	3.8	6.4	8.9	319	347
Germany	91.4	92.2	5.7	0.9	7.4	81	1,137
United Kingdom	52.7	57.6	3.5	3.8	4.6	65	893
Russian Federation	53.5	50.4	28.9	13.7	4	144	351
France	42.9	47.8	3.9	11.3	3.8	64	747
Canada	35.2	33.8	3.2	3.3	2.7	35	951
Italy	27	28.8	-1	6.9	2.3	60	481
Australia	28.6	26.3	9.4	-1.7	2.1	24	1,114
Brazil	25	25.6	24.1	11.7	2.1	203	126

Source: World Tourism Organization, 2015



With the goal of learning more about travelers from countries that most visit the US, the organization Brand USA created profiles of what they considered to be key markets or countries, such as Australia, Canada, China, Brazil, Germany, France, Russia, Japan, the United Kingdom, among others. The profiles gathered information on what are these markets' motivations, impressions, interests, sources of inspiration, preferred travel seasons, average travel expenditure, why they choose the US, etc. The gathered information allows them to have an insight on potential travelers' behaviors, and preferences upon travelling. This helps define key strategies for increasing the number of visitors originating from particular destinations.

Given that Puerto Rico does not currently have direct flights originating in all of these countries, we must strategically take advantage of the access points we already have.

MSP YYZ BBL BOS
ORD DEBWIRDJEK
DEW CLT
LAH TFA MXC
CUN

Puerto Rica SJU
PTY
BOG

Direct flights from San Juan to America and Europe

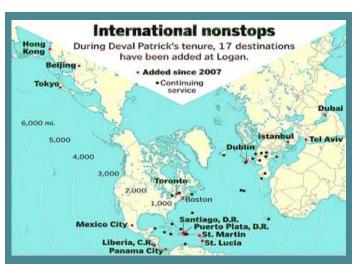
We currently have direct routes from several cities in the US, the Caribbean, Bogota, Panama, and Madrid. We also have seasonal itineraries from Canada, Cancun, London, Frankfurt, Oslo, Stockholm, among others. However, these direct-flight accesses, although significant and desirable, do not have to limit our target markets.



Important airports that originates passangers from Asia

In those countries where we cannot count on a direct flight, but result in a significant number of international travelers, it is imperative to stimulate marketing strategies that motivate them to visit us by designing conceptual bridges which make use of the access points we already have. For example, we can take advantage of the millions of Asian international visitors who visit the East Coast of the US.

We must have promotional efforts directed at inducing potential travelers to include Puerto Rico in their itineraries when planning to visit destinations that have direct access to the island. We must let them know that they can come to Puerto Rico by taking advantage of a short domestic flight, and without having to go through customs. They can enjoy a more diversified, even exotic experience. It's like travelling to Latin America without leaving the US.



As we develop large volumes of visitors from these population centers by using these strategies, we must grow an airline industry capable of opening direct flights to San Juan. Boston did not receive direct flights from Asia until the Massachusetts government, under Deval Patrick's leadership, organized a coalition to promote it. These efforts must be planned at long term because most of the times airlines tend to request adequate aircraft that can take years to put in circulation.

Maximizing all strategic opportunities requires an understanding of the world's trend movements in order to plan and position Puerto Rico's destination marketing. Preferences are as diverse as human beings. They relate to our experiences, culture, and the access we have to information. In the digital world, the way people receive information and make decisions has changed, making it possible to individually market to every potential visitor. The most important digital companies in the world, like Google and Facebook, have marketing strategies that seek to individualize promotional offers. Likewise, Puerto Rico should focus on these new technologies, in order to stand out in a world saturated with promotional information.

Trends show us that in today's industry, travelers are not only using more available information, but also the providers are taking advantage of the information to understand behavior patterns, preferences, accessing potential visitors, providing a more personalized experience, and improving the quality of services they offer. Technology and data intelligence enable the customization of these communications, using a minimum of previous visitor information. By using technologies and tools to understand patterns and preferences; hotels are sending visitors information of places of interest before boarding a plane. This increases brand loyalty. Others are using technologies such as iBea-

con to leave a welcome message for guests upon detecting their arrival.

By 2016, Skift (Skift, www.skift.com, 2016) a market intelligence platform in the travel industry, published a trend report showing changes in consumers' habits, marketing, and the use of data to understand travelers. A main trend topic is customizing trips by using available technology and information. The report highlights the importance of integrating technologies without losing the human element, and underlines changes in reservation dynamics, among other things.

In another publication, Yahoo travel editors (Piazza, 2016) stated that 2016 would see a significant rise in travelers who prefer social networks, and other message platforms to interact with their destination. Some examples included the fact that travelers preferred to request room service by using an emoji, and receive recommendations of places of interest via text messaging. They also presented a rising trend of integrating algorithms to predict individual preferences, that would help travelers create their itinerary with travel platforms. The potential visitors may create personalized itinerary by answering a few, simple questions. Editors also point out that the concept of sharing economy (Uber, Airbnb) will continue to grow, and include new competitors, reduce costs, and increase their product innovation.



In 2011, Scotland launched the Smart Tourism program. It began by mainly focusing on accessing mobile apps that would improve multimedia-content experience, personalized use, and geo-localized experiences. More recently, considering rapid changes in technology, Scotland is emphasizing on the need for improving big-data use for analyzing in real time visitors' behaviors and trends; and for providing customized solutions. They are also experimenting with virtual reality, videogames, and enhanced reality.

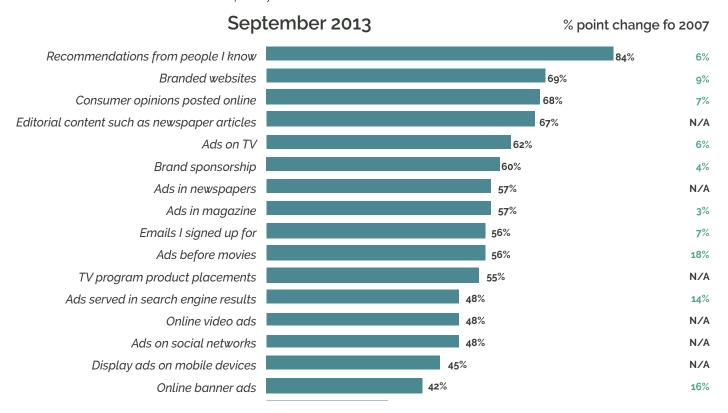
Some of these projects propose turning Edinburgh's streets into a videogame or adding new dimensions to attractions to create more customized experiences. "It's important to understand that tourists want to relax, have fun, learn new things, and expand their horizons. But most importantly, the visitor's experience must feel authentic," according to professor Aroon Quigley, from the University of St Andrews, one of the leaders of the smart tourism initiative. This concept has to do with a mobile experience comprising four aspects: customization (knowing where visitors are), communication (knowing there are others nearby), interaction, and enhanced reality (how was the destination in the past). In this product development process one must consider not only the problem at hand, but also the fact that technologies change swiftly. Therefore, even though enhanced reality seems far away today, soon it will not be.

- SICSA T. S., 2014

Privileged Access for Potential Visitors

Trust in Advertising¹¹

% of global online consumers, indicating that they completely or somewhat trust each form



In order to position ourselves as a desired destination, we should aim to have our visitors become our ambassadors; by actively sharing their real experiences and stories with their loved ones, circle of acquaintances, and with those who share their preferences. By getting and spreading comments, anecdotes, and narratives from these ambassadors; we provide our destination with a privileged access to a pool of potential travelers. According to Nielsen, the most trustworthy sources are recommendations by acquaintances, renowned websites, and feedback from other online consumers. It is crucial to have our visitors proactively share their experiences with their acquaintances (via text messaging, email), and through social media; any people in contact with their acquaintances (i.e., Facebook), and third parties;

through relevant internet platforms (i.e., Trip Advisor).

Every traveler is a potential ambassador for our destination. Their particular features and preferences, their comments and recommendations on their experiences; will help us capture the attention of a variety of segments and markets. It is important to identify these travelers' descriptive features, and their environment: civil status, their family composition, occupation, profession, age, interests, preferences (arts, music, dancing, cuisine, surfing, diving, etc.)— to not only provide different information and content, but also capture and visualize their experiences at the destination, during and after their visit; inspiring other potential visitors with similar features and preferences.

Our visitors will definitely tell their friends and relatives that they came to Puerto Rico. But if we make the experience an unforgettable one, they will not stop talking about how they yearn to come back. In order to take full advantage of this privileged influence access, we need to:

- have a support process for visitors during their stay; that they know is available, and easy to use; and helps them solve unexpected difficulties at the destination;
- motivate visitors to let us know how they feel about their individual experiences before leaving the island;
- ensure this feedback reaches providers and excellence centers to improve the visitor's experience;
- make sure our providers are aware of the importance of answering visitors' comments assertively, and making the necessary adjustments to improve their experience;
- ensure that the visitors' voices are heard, and motivate them to share their stories;

• guarantee that there is proactive communication among each service provider, individual destination, and excellence centers.

(For example: A communication that allows visitors to know we are thankful for their visit, and which encourages them to share their memorable experience and their thoughts on a travel platform. Or a communication which encourages visitors at the airport, just before departing, to share their positive experiences, and help us bring more visitors, reactivate our economy, and improve our communities' quality of life).

It is necessary to have the precise mobile tools and strategies for managing comments during visitors' stay, allowing for assertive interaction between the provider and visitor. Creating new platforms that support travelers in real time, through which they can share their experience, will help us maximize the idea of our visitors becoming ambassadors for Puerto Rico.



In Seoul, an initiative called Global Seoul Mate was launched; inviting foreigners who live or have visited the city to share images, video, and write blogs about their experience at the destination, as a tool for producing promotional content highlighting the different experiences and offers that make Seoul a unique destination. Today, the platform has users from over 26 countries. All of its content is shared on the official website and the government's social media; turning visitors into destination ambassadors.

High-Impact Ambassadors

We can capitalize on specific categories of visitors in order to carry our message to others. For example:

The Puerto Rican Diaspora: Comprising over five million Puerto Ricans, and their descendants, living in different parts around the world. They are a key component (if not the majority) of the visitors we receive annually. A characteristic of our migration is that, regardless of the time living abroad, and even generations later, they still identify themselves as Puerto Ricans. And many still feel a special affection for the island. Through several strategies, they have the potential of becoming our island's permanent ambassadors. For example, Ireland invited those belonging to its exodus to "come home" to explore its offers and experiences. We can encourage those Puerto Ricans who have migrated to share the diversity of our culture, and our different activities with their friends and acquaintances. Promote non-traditional tours, discovering all Puerto Rico has to offer beyond a crisis. Our people who've migrated can help us change our economic path by

becoming the island's permanent ambassadors. The Puerto Rican Exodus represents a great opportunity if we can take advantage of their wish to help the island, and turn them into our ambassadors to the world.

The Puerto Rian Voices: Celebrities, artists, and individuals who are followed by thousands, whether they live on the island or are part of our exodus, must be inspired to promote the experiences Puerto Rico has to offer. Today, many of them visit the island and share the beautiful sunsets of their native land's beaches. These personalities can become high-impact ambassadors. It's not about promoting businesses or products. It's about inviting the world to explore, learn about, and live the experiences their Puerto Rico has, a destination with a lot to offer. Regardless of their influence level, the voices of Puerto Ricans showing off the island; what we like to do, places to visit, and how to have fun inspires other travelers. Canada did this; they showed the world how they explore their own country.



Ireland's initiative, "The Gathering", is one of the world's most important examples; famous for its successful economic strategy. In 2013, they celebrated over 5,000 events throughout the country; organized mostly by families, communities, and several groups as part of a platform for welcoming all visitors, but especially those who had migrated. This project urged one out of three Irish citizens to invite relatives and friends abroad to "come home." In addition to the economic value, this initiative produced a large social impact and revived the spirit of the community. They used models of the community's participation and activity, supported by local authorities. They relied on strategic alliances, volunteers, and the creation of an integrated offer with new and existing events, thus maximizing economic benefit.



Philadelphia launched a campaign to educate residents about the economic impact of tourists. It exhorted residents to invite their friends, and to draw meetings and events that take advantage of the large number of the city's professional associations and sports franchises. Philadelphia pointed out that half of its visitors come to the city to visit friends or relative. This is why it's imperative its residents become the city's "evangelists;" inviting their friends to come over, stay a while longer, to go out and enjoy the city. Another initiative trained providers to improve their treatment of others. For example, taxi drivers, the most visible ambassadors, were trained on the importance of knowing the city's main attractions.

International Voices: Renowned travel or destination experts must be persuaded to visit our island, enjoy its charm, and become friends of Puerto Rico. This would encourage millions to share their stories and images with followers and potential visitors. This category includes travel service providers such as travel agencies, airline-ticket sellers or other intermediaries, editors and writers of general or travel media. It also includes new twenty-first century influencers, such as bloggers, and other important influencers with thousands of followers on the internet and social media enjoying and appreciating the images they upload. We can also take advantage of the arrival of writers, television or film directors or producers, and others that can tell their own stories about our destination, from a different perspective and that consider the island a muse or as a source of inspiration.



Australia created a cell-phone application to motivate travelers from China to plan their trip to Vivid Sydney, a lights and music festival. The app used enhanced-reality technology transforming city images into impressive light images. The campaign was supported by a series of images shared by social networks such as Weibo and WeChat (China's Facebook and Whatsapp) and urged users into scanning their images with the app so that they could see them come to life in 3D. By using a similar app in 2012 more than 4,000 Chinese visitors made reservations for the festival. In 2014, the number rose to 9,700

- NSW, 2015

International Students: International students coming to Puerto Rico, whether for a long or a short stay, are an important source of economic activity for our universities and communities. These visitors represent another great opportunity as ambassadors because they share their experiences with relatives and friends back home. They invite them to come and visit the island that has become their home now. They open a door to a world of opportunities by carrying our message as a destination in the visitor's native language, and even more important, appealing to their culture's particular interests. It is easier for international students to identify and highlight points of interests according to the time of year, which can appeal to the emotions, and create interest in visiting us.



In 2015, for the second year in a row, the Foundation conducted a survey to learn about international student's profile, and their experience in Puerto Rico; thus contributing to the island's development as an academic destination. A point that stands out throughout the survey is the role of friends, because students learned from them about the opportunity of studying in Puerto Rico. We also learned from this survey that a large part of these students received visits from their relatives or friends back home. During the last 12 months, 38% of these students received between 2 to 4 visits from relatives or friends, and the average visit was between 5 to 7 days. This is an interesting fact because the number more than doubles our average of days per stay.

Groups and Conventions: This segment of visitors, arriving as part of organized groups participating in a meeting or in an event; motivated by work, academia, or leisure, is a source of multiple opportunities. Although these visitors arrive for a very specific purpose, nothing prevents them from extending their stays and exploring other experiences. They usually come with family or friends, and as their experience exceeds their expectations, they will want to come back on a personal trip. These travelers bring the additional benefit of sharing information with their family and close friends, and with a larger group of work colleagues from their respective industries. They spark the arrival of new groups, as well as the interest of other potential travelers.

Extending The Length of Their Stay

"This is a common refrain, but I needed much more than the ten days allotted to explore Croatia. Even with this generous amount of time, I was only able to skim the best parts of the nation, not even visiting entire regions. The trip though was a great introduction, a travel first date as it were and left me with a deep desire to return. I'm not alone either, most people I talk to who have visited share a similar sentiment, there's just something about Croatia that grabs on dearly and refuses to let go."

- Landlopers (Blog)

he average visitor currently stays an average of 2.6 nights in Puerto Rico, compared to an average of 7.5 nights in Croatia. While talking to visitors, a common comment was, "if I had only known beforehand of all the things I could see and do here, I would've planned a longer trip." Just like Croatia, the ample range of experiences we offer throughout our geography, a compact destination, rich in nuances; allows us to convincingly show potential visitors the opportunity of choosing a longer visit. But they must see this in all its diversity.

We must identify, catalog, and make our entire range of offers, experiences, and attractions visible to the world. We must connect visitors with non-traditional itineraries; integrating them to our culture, fine cuisine, traditions, and our people in order to maximize their enjoyment and extending their stay¹².

In order to make this conglomerate of sensations visible to the world, it is necessary to first acknowledge the value of the assets we have around us.

Currently, one of our main challenges is that our wide range of offers is almost non-visible to the world. If we explore travel platforms we will see that the offers or places of interests that are presented for Puerto Rico are mainly located in places identified as tourist areas. And depending on the platform, many individual destinations barely have any information. See Puerto Rico, an important digital tool used by the Puerto Rico Tourism Company, gives visibility, information, and other important resources to visitors; including suggested itineraries. The tool promotes destinations and offers by providers that are endorsed by the Tourism Company. This approval gives

visitors a certain guarantee that the destination has been rigorously inspected and regulated. However, this means that hundreds of other destinations and experiences that are smaller or more remote, but potentially more authentic, do not get visibility through these tools. In addition, some small businesses do not have the technological skills to directly create and maintain their own access and presence in social media, which makes them non-visible to visitors. Many of these businesses are located outside traditional tourist areas, and their lack of visibility limits their opportunity to attract a sufficient number of visitors so that they, and their communities may prosper.



In 2009, Australia was faced with the challenge that only a third of their tourism operators had the capacity to make reservations and payments online, limiting their ability to serve potential clients directly. They established strategies with the industry to guarantee that tourist businesses were capable of taking advantage of having digital presence. One of these strategies was developing a multichannel distribution platform for exhibiting products and facilitating reservations. Although they acknowledge that they have not currently achieved their goal of providing all of their providers with internet access, limiting visitor exposure to more diverse regional and local experiences.

- TXA, 2016



The Puerto Rico Tourism Company launched the "Salsa Route," designed to expose landmarks where many of the genre's exponents lived and played their music. The route will offer musical tour guides that will bring visibility to important places in the history of salsa. From historic places in Santurce and Old San Juan, frequented by salsa stars, to tours designed to admire murals related to the history of salsa, and visits to record stores for collectors, the route has it all. Puerto Rico, a key salsa destination, influenced by important Puerto Rican salsa exponents, has a great opportunity to attract visitors from all over the world interested in this music.

- CTPR, 2016

The Visitor economy opens a door of benefits for all of Puerto Rico's geography because it includes and intertwines products and experiences. This is where we can stand out, and create the largest impact. We are a small destination where -visitors can enjoy a diversity of attractive flavors and environments within a few miles. Some visitors have commented on how they arrived at Puerto Rico looking to spend the weekend on the beach, and thanks to the recommendations of others or a little research, they discovered experiences they never thought possible. This sparks a desire to come back, planning ahead the routes that will take them to explore other areas of the island.

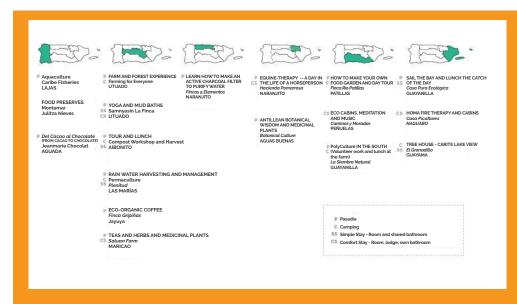
Let's remember the Ruta de la Longaniza. Let's apply this concept to our communities and municipalities where we have authentic native cuisine, which combined with festivals, music, lodging, historic sites—in a nutshell a wide range of diverse and attractive offers— the only thing left is to show the world. Telling and sharing our visitors' stories in several languages, with visual content, in key platforms around the world; invites others to live the experience. This will spark an arrival of visitors that will generate economic activity allowing a strong development of many areas. This is possible in many places of our island!

Imagine if potential visitors could spend a year in Puerto Rico and were still unable to know about all the festivals, gastronomic offers, adventures, sporting events, artistic and natural experiences, and all the other things we have to offer.

Puerto Rico's offer stands out because it provides a wide range of options. From the more typical offers like fine cuisine and natural attractions, to less traditional ones. We have the opportunity to show the world non-conventional experiences like living the life of one of our farmers; from the moment they wake up early to cultivate the land, to having lunch with their family; enjoying the fruits of the land.

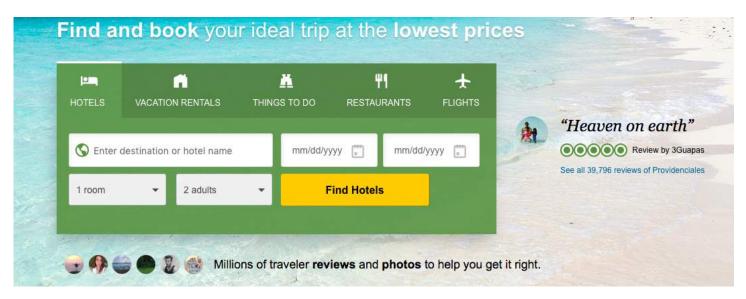
These types of experiences are what travelers are currently and eagerly looking for all over the world, and we already have it. This also creates business opportunities for our rural areas, communities, and sectors that are being affected by the economic crisis today.

It is an opportunity to reinvent ourselves and to connect with the rest of the world. The key lies in being able to showcase all of our offerings to the world.



Puerto Rico has several agrotourism projects to offer that bring in local as well as foreign visitors for daily outings, workshops, gastronomic events, and stays. Tourists enjoy visiting a farm by combining a rural environment with fine cuisine, and sometimes even music from different parts of the island. An example is Plenitud Iniciativas Comunitarias a farm in Las Marias which every year receives students from Northeastern University. Students stay over an average of two weeks in spaces designed for camping, they take intensive permaculture workshops, and become involved in community volunteering designed by the farm.

Visibility in a Digital World



Every business tending to visitors should be present in the main sources and media platform of the digital world. Specifically, travel search platforms like TripAdvisor, Fodors, TimeOut, Expedia, Travelocity, Tripomatic, among others. This information should always be available in several languages, or at least in English and Spanish.

Today, even in tourist areas, not much of our offer is visible. Not to mention areas with the potential to bring visitors that have no visibility in these media. Even when they are found on the internet, there are challenges such as:

• Many social and internet websites are not up to date. They have incorrect, incomplete or outdated information.

Others are diligently updated, highlighting their attractive content on a daily basis, but the information, available only in Spanish, is mostly addressed to local clients, failing to attract non-Spanish speakers to the island (FPR F.f. 2016).

• There are businesses that have been registered in a platform as a result of a comment or complaint by a client. But these accounts without an owner, will leave the client lacking an assertive answer, and without the opportunity of interacting to improve the experience.



Making Our Narratives Visible – Digital Content

Digital marketing is a valuable tool for making our destination's memorable experiences visible. We have to take advantage of this media in order to disseminate narratives, and creative content that inspire potential visitors. We can take advantage of digital platforms with payed advertising. But if we develop an attractive, valuable content we can place it in influential media, and strategic markets; without draining our financial resources.

By incorporating data analysis provided by the markets, we can design new strategies; positioning our content and making it visible.

Some very simple examples of positioning content in social media are trending topics designed for a specific market or profiles we want to reach, and associate our content with these popular topics.

Integrating creative content (Richards, 2016) with tourism strategies adds value because it reaches new potential groups of visitors, improves the destination's image and competitiveness, as it supports the development and growth of creative industries.



The Expedia Pioneer Project, launched by Expedia, sought to create an inspiring content from their own users, focusing on all things users find interesting, useful, and spark an emotional action or response. This requires that we listen to, and understand what travelers are looking for. For the project, Expedia selected two users to travel throughout their own country for a year, and would develop visual content, and write articles of every place they visited. This was the case of Albacete, in Spain, a destination with a reputation for being boring. But due to the content developed by its pioneer user, the boring destination showed another side to it, inspiring visitors to learn more about Albacete

- José Truchado, 2016



Queensland, Australia uses another tool for inspiration, a blog for attracting potential visitors, that educates, accompanies, and assists them while touring the region. This blog highlights brief visual content that invites further reading, and is relevant because the readers focus on topics that they find interesting, and that are related to frequently asked questions like "20 things to do with children" in one of its towns. Who would have thought that "street art" would become an attraction? Or "our 7 best sunrises," "how to enjoy a destination in one day," or "sixday itineraries," among others. Making our experiences visible by using creative content allows interacting with a much more diverse universe of potential visitors. New technologies enable us to live a virtual experience, stimulate exploration, and generate a different attraction to the destination

- Queensland A., 2016

Content must be multilingual, and adapted to the particular needs and interests of multiple countries and cultures. You do not use the same techniques when reaching out to the US as with China, since they have different cultures and expectations. A country's idiosyncrasies and culture must be taken into account when designing our strategies.



There are countless local efforts and stories known only by our communities, which, if made available to visitors, allows them to integrate to our culture, and generates a larger interest and rapport with the destination. One of these efforts is Santurce Sonoro, a research project looking to present a signature sound for Santurce by designing a digital map, that expresses the sounds of the barrio (its surroundings, its residents, etc.), and "what is said" about the barrio (visitors, specialists, the media)

- Noticias, 2015

There are several sources of inspiration for this content that provide a sea of information that, if handled correctly, will create interests, and inspire those who receive it. Some of these sources are:

Our Communities: Stories that pass from one generation to another. For example, stories that describe when, and how our renowned heroes or artists, known across the globe, lived. Stories regarding that place at the wall of La Princesa Prison where families would bring food to inmates. Or the tales behind the street art.

Our Culture: The product of the creativity of our writers, musicians, historians, and traditional or urban artists that submerge us into a captivating narrative.

Our Experiences: The design of stories and fiction tailored to personalized experiences and connected to the particular circumstances of a specific market. For example, the Tourism Company's campaign that paired salt extracted from the beaches of Puerto Rico with a travel offer targeting Chicago residents to motivate them to visit Puerto Rico in the middle

of the harsh winter season.

Our Visitors: Their own stories and visual content, appealing to wider audiences and contributes with their skills, and distribution networks.

Such creative content, which can be in narratives, and also in more technological and visual immersions, enables people to frame places, events, and experiences connected to a destination, and use them to present information differently. It also allows us to connect with the visitor by using new technologies, and creative marketing campaigns.

It is essential to create awareness about the importance of digital presence, and the value that visitors bring to our economy. It's also crucial to include civil and commercial communities to identify assets and the offers around them, train business owners in the process of maintaining and maximizing digital tools, create support systems to facilitate the process for them, and to execute strategies that allow us to include our offer in search platforms used and trusted by travelers.



Canada developed the strategy, Canada Shared by Canadians -Keep Exploring, to motivate its residents to share their experiences on social media, and Canada's official website. As a result, over 7,000 entries were obtained, with thousands of images, and more than 65 hours of footage. This is kept in a storage area that is accessible to all users, to be used as promotional content to show the world the opportunity of exploring their experiences. A two-minute video was prepared with these visuals, with over two million views in just the first month.

Designing and Customizing Itineraries

Way before the digital era came around, routes and itineraries were used for planning trips. They are a way of segmenting a destination, taking into account travelers' preferences. St. James's Trail in Spain is an example of an itinerary that has attracted millions of visitors for over a thousand years. Specialized routes in gastronomy, agriculture, wine, religion, ecotourism or architecture, among others, make up the essential offer of many destinations.

The availability of interactive technology allows us to know potential visitors' individual profiles, presenting the offer of a diverse destination, already adapted to specific preferences. Profile data can become proposed itineraries (things visitors can do in a day or in a week) that can be sequenced taking into consideration geography, distance, destination business hours, events, etc. Personalized itineraries may be scheduled, adapted to specific dates according to visitors' plans, and individual events may be reserved on line if needed.

Designing routes, coordinating reservations, and interactively accessing them at the destination may be a powerful tool for improving visitors' experience because it eliminates unwelcome surprises and unexpected difficulties. There are tools that already allow visitors to interactively participate in configuring customized itineraries by simply answering a few questions about their profile, and choosing activities. These tools provide suggested itineraries based on preferences (Utrip, TripHobo, Tripomatic); they even allow changing and sharing itineraries. Some of these platforms allow the visitors to make events reservations by following the link to the individual provider, while others join travel

platforms where the user may book and pay for attractions beforehand. Soon they will be capable of building an itinerary, completing and paying for all reservations at a single site.

The evolution of the capabilities of digital platform that are available throughout the world (from establishing preferences for selecting a destination, identifying individual experiences, materializing them into an itinerary and scheduling them, to the necessary increase in its use) makes it vital for Puerto Rico to make sure that all of its offers are visible (Facebook or TripAdvisor), and interactively accessible through these new tools.

Puerto Rico must make sure that every one of its thousands of service providers (restaurants, stores, galleries, museums, music destinations, guides, artists, etc.), as well as its sports and recreational activities, are not only available, but also visible, to visitors. Existing experiences should be found or included in visitors' scheduled itineraries, until the transaction is completed.

Simply put, designing customized itineraries allows us to strategically connect with travelers from other countries, at the perfect point of the visitor's cycle, with the information that appeals to their needs. Considering the different things we have to offer, it is important to develop the capacity to create customized itineraries for visitors by focusing on their interests. This way we can let the world know what we offer, spark an interest in our destination, and open up a world of opportunities to learn and incorporate a different set of experiences, planning a longer stay, and more likely enjoying their visits.



Consistency in our Brand



In a highly competitive world, where customers have access to a sea of information, it is important that Puerto Rico defines itself as a destination, and what sets it apart from others. Consistently developing a brand and a strong image that is renowned, is crucial for promoting our destination. A national brand should reflect the destination's values, and show what makes it different, unique and attractive.

This brand proposal should be understood and supported by a wide range of stakeholders that represent the destinations diversity in order to develop a direct, coherent, and consistent advertising campaign. The selected brand must appeal to emotions, focus on potential visitors' preferences, and be consistent. A strong brand helps to reduce the choices potential visitors consider.



In Columbia, the national brand is a strategy freely used for citizens and foreigners. It is a platform that openly invites individuals, organizations, and businesses to generate and share positive content about Colombia. This includes the website www.colombia.co, social media (Facebook, Twitter, Google+), and using hashtag #LaRespuestaEsColombia [the answer is Colombia]¹³. This effort was combined with an education campaign called "We are all part of the answer," a local campaign exhorting all Colombians to upload positive content about Colombia, and to share and comment their website's articles, thus showing their will to work for Colombia.



The initiative invited Colombians to create a profile on the website, in the section "I am part of the answer"14, and to posting, and is upgraded to a better category as they accumulate points, until becoming the best ambassador. The categories are as follows: wanderer (0-200 points), adventurer (201-999 points), explorer (1000-1999 points), expeditioner (2000-2999 points), and traveler (3000+ points). Users with the most points, who reach the highest category, are highlighted on the main page as ambassadors of the Colombia brand.

Another initiative of the Colombia Brand is "100 Colombians,"15 a project by the FusionArte Association which is sponsored by the Colombia Brand, and pays tribute to the 100 most notable Colombians living abroad. The goal is to show that, besides its professionalism and the education of its people, Colombia is also an investment option. The one hundred Colombians who were chosen are an example of excellence; representing a good example of Colombia's talent. They also manage to pique the potential visitors' curiosity, and create an interest for Colombia; inspiring people to want to get to know the destination, by means of a positive association between its renowned personalities living abroad and Colombia as a destination.

Consumer's minds need to associate a destination with a particular topic that helps them to understand its essence, easily remember, and provoke an emotional response. This is why Puerto Rico need to define what makes it stand out. Its nation branding must be consistent. Even when strategies and campaigns are different, they must be aligned with the brand, not subject to changes in government due to elections nor advertising agencies. This consistency will allow us to be present in the mind of potential visitors.



Oregon, USA example: In the 1980s, the state of Oregon in the US, in response to the economic recession, began positioning itself as a tourist destination, and launched a campaign with a new brand: "Oregon: Things Look Different Here." This different brand was used for over 15 years, and consisted of highlighting businesses and products, and visitors were attracted to it. According to Curtis (2012), the Oregon experience gives us four learning points. First, a brand cannot be imposed. It has to be understood, shared, and accepted. Second, a brand must integrate strengths, and bring a new image or perspective about the destination. Third, the brand's effectiveness must be constantly evaluated. Fourth, there must be a long-term commitment with the selected strategy.

- Pike, 2012, p. Apx10.1

Oregon's example shows us the importance of commitment and alliances. Developing a brand that reflects the destination's values means representing the community's values (Pike, 2012, p. Chapter 4). We cannot sell what does not exist. And we cannot force an entire community to present itself as something it is not. This is why it is crucial that during the process of brand identity development we include several stakeholders that analyze what makes us unique, and what would be the natural way we can offer it. It is also necessary to define an identity that shows the essence of the visitor's experience. It must also provide a vision that guides and motivates the ecosystem's stakeholders, communities, the supply chain, and general population into a long-term commitment.

A group of students from Universidad del Este (FPR/UNE, 2016) suggested that Puerto Rico has the natural resources to develop a national brand, and logo that helps create confidence, pride, diversity, and position the country at a national and international level, with a favorable image. Some of these students' recommendations for Puerto Rico include establishing a consistent and permanent national brand, and that advertising campaigns specialize and focus on the opportunities at hand, without affecting the brand.

The Puerto Rico brand must showcase what differentiates us, and implement a consistent strategy with a long-term commitment that ensures that both the government, and industry will protect, and use the brand.

Act No. 70 of 2013, Act for the Development of a Country Brand, created a multisectoral committee that would be in charge of defining, and looking after these elements. However, this committee has not been set up; and has received some opposition within the industry. The act presents several key elements for brand success, such as its continuity, and commitment to it outside the election cycle. This is why it is necessary to evaluate the committee's composition in order to guarantee a fair, and impartial representation of the ecosystem.

Developing a solid Visitor economy requires that we differentiate ourselves as a destination. We must show unique experiences that appeal to potential travelers, and motivates them to visit us. In evaluating our strategies of positioning in the travel market, we must be aware of the trends and technologies that allow us to pinpoint visitors' preferences. This will give us the opportunity to present our destination through creative content, and narratives that adapt to their profiles; through the platforms they use to research and plan their trips. What distinguishes us, our identity, our essence, our values should be consistent in the long run. We must work together for a common goal. We have to project these features to the world, and inspire more people to come to Puerto Rico and explore its ample, compact geography.



Let's take a look at Costa Rica, the third most visited country in Central America, a nation known for its natural resources. After maintaining a brand for 16 consecutive years that made Costa Rica stand out, and that brought great results; they defined new goals to position themselves as the first destination in Latin America. To reach this goal a new, permanent national brand was created, that focused on expressing who they are, and the quality of services and products they can offer the world, Essentially Costa Rica. Even with an evident change in brand or slogan, the essence of what defines Costa Rica as a brand has not changed. A focus on their natural resources, the quality of their products, and the essence of its people, the Pura Vida slogan, are points which they have consistently kept, defining how they see themselves, and how they want to be remembered.



IMPROVING THE EXPERIENCE AND INCREASING CAPACITY



mproving the visitor's experience will require a change in our mentality. We need to appreciate and take advantage of our welcoming nature. This means being more open and receptive with visitors, making them feel welcome and connected to the destination. This will bring a larger number of visitors and inspire them to extend the length of their stay, thus allowing them to learn more about our culture and geography thus become ambassadors for Puerto Rico.

Developing a local Visitor economy must focus on ensuring a quality experience for visitors. This approach demands a commitment from all of us; citizens, service providers, academia, transport operators, and many others who directly or indirectly interact with visitors. Improving the visitor's experience requires that we

improve elements such as a digital infrastructure with good coverage and a robust visitor access. It also requires developing new technological tools, and digital platforms that assist the visitor while travelling, thus improving the quality of the visitor's experience. Furthermore, it requires that every Puerto Rican understands the great value that visitors represent for our economic recovery.

By improving our visitors' experience, we increase the chances of visitors extending the length of their stay not only in time, but also geographically. This translates into a potentially larger economic impact, distributed throughout the entire island. This is how we expand the economic benefit of the visitor economy.

Guaranteeing the Quality of the Experience

eaching the level of excellence that we aspire to, as a destination will require that we guarantee the quality of the experience for all visitors in their satisfaction with products and also with the services they receive from interacting with every one of us. This begins with a commitment from all Puerto Ricans to guarantee that visitors feel welcome, like loved ones coming to visit.

Creating a Welcoming Culture



land's most beloved idioms, and one of the most renowned. The Irish are very proud of how they extend their welcome to visitors. It has to do with an informal conversation, a friendly gesture, respectful curiosity. Flying back to the US, I met a lady who told me, "Ireland feels like an old friend." Mairead Geary, Irish Central.

- Mairead Geary, Irish Central

A welcoming culture is indispensable for a successful economy based on visitors. The effect of human warmth on visitors is extraordinary, almost magical. One of the things that visitors look for is to share and connect with other human beings in their travel destinations. This completely changes their perspective on the experience.

Fortunately, Puerto Ricans are known for being hospitable and friendly. This characteristic is highlighted by many people who visit the island. It is important that every Puerto Rican and resident acknowledge the great value visitors bring; understand that visitors are a priority; that visitors represent an opportunity for improving our economic situation, so we should make them feel welcome and appreciated.

We cannot see our relationship with visitors as a mere transaction. Nor should we look to get something out of them or sell them something all the time. It is crucial to engage in conversations with visitors. We have to

show our interest in getting to know them. Be willing to share personal stories and favorite places, our most profound experiences, and our vision for our children. Let's befriend our visitors so they feel as if they were at their second home, filled with experiences, creating memories.

Travelers want to live an authentic, spiritually transforming experience. Interacting with local residents at has become an important part of what they want to experience. Visitors want to know how we live, where we work, what are our customs and traditions, and what we do in our free time. This makes us a key asset and distinguishes us from other potential destinations.



In Sweden, the Tourism Association created The Swedish Number. This is an experimental platform for ambassadors that allows any Swedish citizen to register, and be available to receive phone calls to talk about or respond to questions from potential visitors from all over the world. In less than three months, they made over 180,000 interactions; receiving phone calls from people from over 180 countries. This effort is an example of the wide range of possibilities for boosting direct interactions between locals and potential visitors. Mairead Geary, Irish Central

- Mairead Geary, Irish Central



The Puerto Rico Tourism Company recently developed a campaign directed at improving the quality of services offered to visitors called "Nos toca brillar" [It's Our Time to Shine]. According to its official website, its three main goals are: increasing tourism's contribution to the gross domestic product, differentiating Puerto Rico's tourism offer from its regional and world competitors, and stressing the importance of the tourism industry for economic development to Puerto Ricans. Main strategies to achieve these goals include educating the general community on the importance of offering excellent service, training strudents, tourism businesses, and government entities on good-service strategies and techniques, and acknowledging which tourism industry components stand out due to their service quality. The website includes examples on cultural topics such as our fine cuisine, like the "chinchorro," it focusses on citizens' role in helping visitors, and on tips for sharing with visitors. In order to get the community involved, a campaign was designed for television, radio, and social media; showing simple examples of how to bring good quality service to visitors, with the slogan, "Nos toca brillar."

We have to be ambassadors and even friends of our visitors. We have to talk to them about our culture, and about what makes us special and unique. We have to connect visitors with our multiple destinations and experiences that otherwise remain invisible or inaccessible to them. To achieve a better interaction between visitors and residents, it is essential to create gathering places (digital and physical) that facilitate communication and interaction.



A group of young Puerto Rican, entrepreneurs have created a platform called Lokal Buddy. Its goal is for locals to post several experiences they are willing to share with visitors, hosting the latter in tours and activities at their local homes. Activities range from traditional dinners, to cooking lessons, night outings, road trips, etc. This kind of interaction allows visitors to experience the multiple dimensions of our culture, which often connect visitors on an emotional level with the destination, and promote the development of cultural tourism.

Cultural Differences and Service Expectations

As we receive visitors from different cultures, it is important to focus on learning other languages as part of an education process for all (students, professionals, entrepreneurs, etc.). We must incorporate courses into our school curricula, especially in tourism schools, that increase our knowledge about different world cultures. This will provide us with the human talent

with knowledge in different languages and cultures. In addition, this approach will require physical signage and digital explanatory material available in several languages, adapted to different cultures, especially in places where providers directly interact with visitors at airports, lodgings, restaurants, tour operators, and taxi drivers, among others¹⁶.



Paris focuses on improving the impression visitors receive about the way in which they are treated, and on educating citizens about the importance of providing good service; the importance of giving a good welcome, and understanding differences in treatment of several types of tourist. France has generally had a reputation of being rude to visitors, especially those who do not speak French. Understanding the importance of tourists' contribution, the government has defined among their proposals for increasing the number of visitors by 2020 the urgency for working on turning a true welcome culture into an immediate priority shared by citizens and professionals. Among the tools they have developed, there is an alliance between their Chamber of Commerce, and regional tourism committees, which created a manual on addressing visitors along with a campaign called "Do You Speak Touriste?". The purpose of the tool is to focus on the quality of the welcome, and for tourism professionals to understand the cultural differences among tourists. For example, a British tourist will prefer having breakfast and lunch early, and an American will expect restaurant service to be quick and excellent

- MacGuill, 2013

Incorporating Academia

The role of academia is critical for achieving a change in mentality that gives priority to visitors. Academic curricula will need to be updated in tourism schools, and in academic departments of other disciplines that directly or indirectly affect different dimensions of the visitor economy will need to be updated.

As we mentioned before, the human factor is key for the visitor's general experience, particularly when referring to those who work directly with visitors such as taxi drivers, tour operators, and hotel staff. To do this, local tourism schools must update their academic curricula to focus on the need for service quality. They must research on global trends in the tourism industry, and its impact on the local visitors' economy, as part of the learning process¹⁷. Academic programs

must include compulsory courses in several languages, other than English, and different cultures; that prepare and train our human talent for providing services to visitors in different cultural contexts.

Academia must dedicate more time to practical aspects, larger opportunities for internships and student exchange: work programs that give students the opportunity to practice what they have learned. Students will also be able to acquire the skills required for the visitor economy, and industries adapted to global trends. This translates into developing a highly qualified human capital, elevating the visitor's experience.

As part of the learning process, universities must focus on practical, education models (the "learn by



An example of how academia may integrate itself into the visitor economy is Sant Pol Hotel-School in the province of Barcelona, a school specializing on Hotel Management and Tourism, that combines theory with practice as part of the learning process. Students are exposed to real situations they might encounter during the daily operation of a hotel. The curricula incorporates courses in several languages, courses on the different economic dimensions of the tourism industry, and specialized courses on the different aspects of hotel management. The school has also focused on establishing strong bonds with the leading local and international hotel chains in Spain, in order to offer their students different alternatives in internships before joining the work market

- stpol, 2016

doing" methodology) in which students can apply learned knowledge, and skills.

Given the extensive effect of the visitor economy to other sectors of the general economy, it is important to integrate this topic into the academic curricula of other courses; especially those that can indirectly influence the visitor experience, such as entrepreneurship, information technology, programming and engineering. An example would be programming and coding, which can encourage students to develop technological and digital tools to benefit the Visitor

economy, and enhance the visitor experience. Basically, all courses can be redefined according to how they relate to the visitor economy.

There is no doubt that the academic sector has a vital role in developing the visitor economy, in training the necessary human talent to design, build, and support the efforts that guarantee an extraordinary experience for visitors.



A collaborative effort between Foundation for Puerto Rico and Universidad del Este, in which students researched service providers for the Visitor economy, emphasized that one of the main factors limiting visitors' access to most of our available offers is a low visibility in digital media. Other factors include a businesses' lack of sophistication, that extends to poor emphasis on quality, and a limited use of technological tools. The results motivated organizing events that promote exchanges between industry leaders and service providers, community workshops focused on training providers on how to take advantage of digital media in order to make their businesses more visible, and accessible to visitors, who have the potential of becoming new clients and represent more income.

Innovating for Change



We can carefully analyze, acquire knowledge, and change priorities. In a world where innovation prevails as a means for progress, we will not be able to change our path by doing more of the same. We transform ourselves by reinventing ourselves.

For many years, our service and consumer economy grew and fortified itself when local businesses emulated businesses models from US companies. Local enterprises even acquired information systems, programs, packages, and development processes made by US companies, allowing local businesses to operate more productively than their competitors. This process entailed a sort of time arbitration: they were not creating. Instead they were relying on innovations of others who had never even visited our island.

In the twenty-first century, the arbitration of time has practically disappeared as an economic opportunity. We can no longer copy off the scripts of others and expect to be successful. What's even worst is we keep trying this failed formula. Today, as we try to emulate others by copying yesterday's innovation, we remain in the past as someone else is developing tomorrow's ideas. During the 1980s, no one would have ever thought that our lives today would depend on mobile devices, and that programs would only be

developed in this format. In Scotland, the SICSA, an organization that applies technology to tourism, explained that developers must look past current innovations. For example, an enhanced reality technology may seem too modern now, but soon it will become outdated (SICSA T. S., 2014).

Over a decade ago, the great academic and business knowledge centers, such as Harvard and Stanford, began documenting fundamental ways in which businesses and entire industries competed, and transformed themselves based on innovation. Innovations were catalogued as increasing, disruptive, or catalytic and they showed how these practices had become dominant, even in projects of social-impact (Sadtler, 2006).

Rescuing Puerto Rico from its crisis will require us to change our socio-cultural "chip" of imitating to innovating. We have to use the knowledge that we have developed by exploring a changing world, not for recycling the past (ours nor others), but for inventing a new future. We will have to rethink what we are, taking into consideration that only a few aspects of what worked for us earlier will be relevant for what we will become.

Centers for Excellence

The goods and services that we offer to visitors should be of the highest quality. This would guarantee that visitors live a complete experience, with consistent quality, regardless of the activities in which they are involved in or their experiences during their visit. The range of visitors' activities is ample. They may acquire goods such as arts and crafts, clothes, and food; different services such as tours, lodging, restaurants, medical services, educational services. Service providers in these contexts do not always have the same education or training nor the same emphasis on quality as a distinctive element.

In order to address the quality and consistency in service we suggest establishing centers for excellence, where academia, the private sector, individual entrepreneurs, and business owners work together. These can also serve as practice centers so that providers and students may learn the different profiles of the travel market, and know the different ways to guarantee diversity and quality in products and services. These centers should provide entrepreneurs with the tools that enable developing new products and services (physical and digital). They should focus on improving experiences and complying with the highest standards of quality.

These centers can also tend to visitors by offering a place for immersion and interaction, allowing them to have a variety of experiences within a specific small area. This would also enable providers, scholars, and students to observe and understand how the offer satisfies the visitor's expectations. It would also offer a continuous opportunity for improvement. Furthermore, these centers successfully implemented in Puerto Rico could serve as a model for other centers located in key areas visited by tourists from all over the world. Some tourist destinations and main consumer brands (like the Apple Store) are currently practicing this initiative, allowing potential visitors to learn, and even practice from afar some dimensions of their products or their destination experience.

We suggest creating a center for excellence specializing on the visitor economy. It would endow existing, and new businesses that offer innovative services and products to visitors, and develop different technological and digital tools that help improve visitors' experience. This center should have direct ties to academia in order to encourage continuous research and the training of human talent needed for the constant development and future evolution of the local Visitor economy, following new trends.

Besides ensuring the quality, it is important to identify ways of measuring and providing incentives so that this remains constant and continuous in both creating and the evolution of products and services offered to visitors. We recommend creating methods to acknowledge service providers: awards and certifications that encourage them to comply with standards established for quality, and to continuously improve, thus ensuring excellence in several types of visitors' experiences, and in the services and products that visitors acquire.



Looking to improve the competitiveness of the businesses of its region, the Spanish government of Castilla-La Mancha, in conjunction with the local Industrial Organization School developed an initiative called Factoría de Innovación [Innovation Factory]. They established a series of centers for excellence located throughout several zones of the community, to provide free services to small and midsize businesses throughout the Castilian region, provide them with the tools for developing and enabling projects that would integrate elements of innovation in their production and management processes. Each center for excellence specializes on the industries within its area, among them the agri-food industry, creative industries, the logistic sector, and others.

- CDE, 2016

Creating Support Structures

Travelers today, more than ever, seek to identify and choose the types of experiences and activities they want at any given destination. These trends have resulted in the creation of new tools, mostly digital, that help improve visitors' experience. These include creating websites, digital platforms, and applications. Today's traveler prefers local and individualized nuances, and is greatly influenced by technological and digital factors, these tools offer potential visitors access to the content that allows them to learn about the destination and participate in designing their own experiences, and choosing and organizing different activities during the trip.

Considering the digital aspects, it is important to create digital support structures that help keep the information and content available in different websites, platforms, and mobile apps up to date for visitors. These support structures should also ensure that the content is always updated and complete, that it fulfills the expectations and needs of different travelers' profiles, and ensures easy interaction for the visitor. It is necessary to have the capacity for service providers to keep business information updated and for them to be able to edit and update from a single source that is automatically updated to several digital platforms.



Meeting the expectations of your Chinese visitors and making them feel welcome

China Cultural Information and Training Resources for Tourism Operators



Queensland, a state located in northeastern Australia, is an example of places that have created support structures to improve the visitor's experience. To satisfy the needs of the Chinese market, their main and fastest-growing market, the state government created a guide directed at tour operators, providing information about Chinese travel trends. These guides include information regarding their taste in food, their travel expectations, descriptions of activities they tend to like, and tips on how to offer and provide Chinese visitors with different types of services

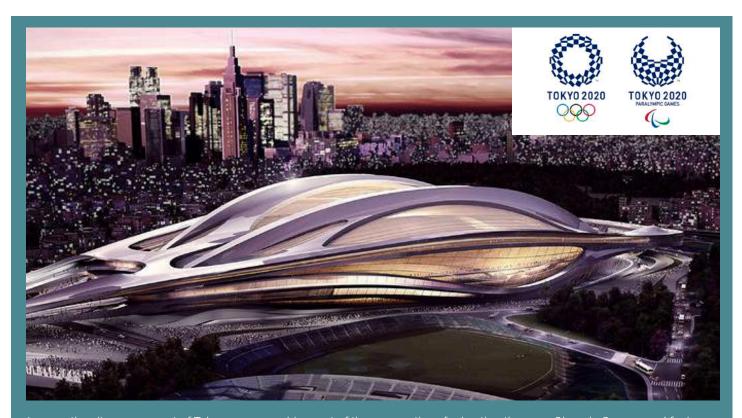
- Queensland T., 2012

The need to build these support structures that would increase the amount of information and knowledge located in digital platforms also represents a great opportunity for entrepreneurs. It also encourages the development of products and innovative, technological tools that take into account the constant technological evolution which we live in, and even the continuous changes in travel trends.

The human touch is essential for the visitor's experience. We should develop the means of providing access to a support center capable of connecting visitors to skillful service personnel, equipped for interacting with visitors at any moment. This intervention must be facilitated by phone or by digital interactions integrated to tools that visitors use during their stay, and that

would be mainly used in situations when digital tools do not provide a solution. Service staff should have visitors' information at hand as a component of the digital tool in order to know details of the visitor's activities at the time of interaction.

Support structures that are developed should be integrated to digital platforms, and should include updated content to address current and future visitor needs. Several providers should have access to these structures to have updated information regarding visitors' behavior. These structures should also efficiently facilitate interaction with visitors before, during, and after their visit; in order to obtain comments and feedback that allow service providers to monitor and adapt their offer, thus improving the quality of the visit.



In 2015, the city government of Tokyo announced (as part of the preparations for hosting the 2020 Olympic Games, and facing an increase in the arrival of international visitors) the opening of a multilingual call center. This focused on free translation and interpreting services in English, Mandarin, and Korean for hotel and lodgings representatives throughout the city. In January 2016, the service was extended to small and midsize restaurants and taxi operators, who do not have the available resources to hire interpreters or to offer their employees courses or training. Opening this center is an example of support structures that can be created for helping providers improve the experience they offer visitors

- MASUI, 2016

Making it Easy for the Visitor to Dive into the Experience

The Importance of Local Digital Connectivity to Visitors

n a world characterized by constant technological evolution, dominated by digital and mobile technology, it is imperative to facilitate the visitor's connection to digital networks and infrastructure. This would allow them to use existing local platforms that provide information about destinations and events throughout the island, access to transportation platforms, and access to important tools such as digital maps, that allow the visitor to move about the entire destination. If we facilitate the visitor's access to digital infrastructure, not only will we help give visibility to the information on the islands micro-offer, and the different destinations available throughout the island; but also connect visitors to them. Visitors can use their mobile apps, and search online to find available micro-offers outside of San Juan, all across the island.

Providing visitors with access to digital networks and infrastructure requires giving them connectivity offers, at a reduced rate, to our cellular network so that they can stay connected; enjoying their itineraries without consuming or spending a large amount of money in data.

A minimum requirement of any solution must allow visitors to interactively explore events and activities, have a description, and details of the logistics and transportation that will make their visit easier.



In destinations like Mexico, as soon as the visitors arrive they are offered a SIM card that allows them to use their phone at the destination without incurring in expensive international roaming charges. Australia created alliances with several entities, and provides visitors with international SIM cards at reduced rates. In addition, main cities throughout the globe have digital infrastructure, providing free Wi-Fi connection in public places such as plazas or squares, airports, shopping malls, and other places. For example, Paris has over 300 free-access points, while Malaysia, in alliance with a telecommunications company, provides over 1,500 access points in commercial, tourist, residential, and public areas

- Mexico, 2016



Insidr, a Parisian startup, provides an alternative to foreigners who cannot use their phones due to high international data rates. With a fixed rate, they provide users with access to calls while at the destination; as well as access to maps and recommendations for exploring the city. This service also provides access to essential mobile apps for today's travelers, such as social networks, currency converters, and local apps for food delivery, babysitting, etc. It also provides visitors direct access to locals through a chat for asking questions about places to visit, giving recommendations, help during the stay.

Strengthening Our Digital Presence

Integrating visitors to digital infrastructures and new technologies will make our offer visible, and will give us the opportunity to interact immediately with visitors. The new technology gives visitors the tools for visualizing, and designing customized experiences. They would also be able to digitally schedule, make reservations, and create itineraries of their visit. This would be a great benefit for local service providers because they can make their offer visible to the world, and dramatically increase support for their services with the help of other providers.

According to a research conducted by Foundation for Puerto Rico, in collaboration with Universidad del Este's Hospitality and Culinary Arts School, few service providers have some digital presence that focuses on local tourism, instead of on visitors. This is a

great opportunity to help service providers and event organizers increase their presence in digital media. Digital presence also gives an opportunity to create networks and links with other service providers so that together they can design the content, multilingual narratives, and even come up with trip itineraries that classify and illustrate several experiences visitors may have. These combine natural sites, historical, cultural, and gastronomical sites with festivals, artistic or musical events. Combining the digital offer, local providers will also have the opportunity to interact with visitors more directly.

Taking this trend into consideration, we suggest creating a digital platform that allows combining large amounts of content, from several sources of information, developed by service providers, communities,



In 2001, a collaboration between the state Ministry of Tourism, and several regional tourism offices created the Australian Tourism Data Warehouse, whose main goal was to help tourism operators maximize their opportunities in the digital world. In addition to having an educational function, this entity gathers information from offers, stores it, and distributes the information to be used by other online platforms, and reservation systems. It helps providers increase their digital exposure by registering them only once, and gives them access to a statistics platform. The data warehouse currently has over 40,000 products and 150,000 images distributed in over 11 categories - ATDW, 2016



An analysis conducted by volunteers from Foundation for Puerto Rico found that, in an area adjacent to tourist spots, 33% of service providers did not have any exposure on main travel platforms. Only 27% of the businesses were on TripAdvisor, and 86% received unanswered, negative reviews, which adversely affects its ranking on the platform. Most businesses do have presence on social networks. Facebook is their preferred choice. It is worth mentioning that these platforms are mostly directed at the local market. And even though these platforms are used by visitors in their home countries, they find it difficult to find places and attractions at the visited destination. Based on the obtained results, although most businesses have digital exposure, most of it is focused on the local market, and are still poorly accessible to visitors.

current visitors, and individuals. The platform will offer visitors a series of suggested itineraries comprising unique activities, and events throughout the island. It will also give the opportunity to customize experiences according to the visitor's interests and needs, and will allow them to digitally schedule, make reservations, and create trip itineraries. This platform will also allow providers the opportunity to respond, and address visitors' needs in a more direct, easy way.

In other words, in order to connect visitors with our entire offer, it is necessary to bring visibility to the different destinations and experiences that are available by designing varied content, available in several languages and easily accessible to visitors. This would have a positive result for everyone, especially small businesses and other entrepreneurships throughout our geography.



Thailand gives us another example of tools for incorporating innovation to tourism, in this particular case with development too. The Ministry of Sports and Tourism developed a digital platform providing travelers with everything they need to plan their trip, and during their visit; in a single location. They hope to launch the platform in late 2016. Visitors will be able to plan their trip, coordinate reservations, schedule events, have access to digital guides, and concentrate on tourist sites. The platform aims to motivate visitors to stay for a longer period, generating more income for Thailand, by increasing the exposure of their diverse offer, facilitating travel planning, providing a centralized space for service providers to make their offer visible, and making it all more accessible to visitors.

- Correspondent, 2016



Another example of the importance and benefit of strengthening digital exposure is Tahiti, in French Polynesia, in the Pacific Ocean. As part of their smart tourism, the local government implemented a strategy that seeks to improve, and expand free internet access as a tool for increasing local providers' presence in digital media. This would make them more visible to visitors, and travelers can take them into consideration as part of the destination experience. In addition, it is an effort to promote digitalizing the visitor's experience, and making it easier for them to move throughout the destination. This in turn allows them to connect to a wide range of experiences, and destinations located throughout the archipelago, by using technology and a 24/7 support network in several languages - Greg Oates, 2015

15) Colombia Co. (2013). Todos somos parte de la respuesta. Recuperado de: http://www.colombia.co/participa/mecanica

¹⁶⁾ Marca Colombia. (s.f). El 5 de diciembre se presentará el libro "100 Colombianos". Recuperado de: http://www.colombia.co/talento/el-5-de-diciembre-se-presentara-el-libro-100-colombianos.html

Expanding Experiences and Making Them Visible



Historically, most experiences accessed by our visitors are limited to certain important activities, and offers in traditional tourist areas. The Tourism Company currently makes them visible (on their website, and with marketing and advertising efforts), or hotels and tour operators facilitate them. Tourists have no problem in knowing or arriving at El Yunque Rainforest, the city of Old San Juan, the Bacardi Rum Factory or Toro Verde. However, Puerto Rico is a destination

that provides other countless experiences, mainly known by the residents themselves, and are not easily visible or accessible to visitors. By exposing or making these experiences visible to visitors, we dramatically expand the economic impact of the visitor economy, and distribute its effect to different regions of the island, especially those that are not currently visible or accessible to visitors.



Skift- Free Report: The Rise of Food Tourism. According to Skift, trends show that today's travelers prefer culinary and gastronomic experiences they can experience at the destination. This publication also establishes that visitors attracted by fine cuisine have a larger interest in getting to know the different cultural attractions, and exploring the region. Countries like Ireland are taking advantage of their gastronomic offer to give visibility to other attractions like cultural events and festivities, helping to expand and let visitors know what they offer. Similarly, Nashville, Tennessee, famous for its music industry, designed strategies to promote its growing culinary offer. It takes advantage of the visitor's interest in music, and uses platforms like Spotify, and provides playlists selected by chefs from renowned restaurants in the city. The growth of the culinary industry has brought a boom of new restaurants opening throughout the city, and the celebration of new events that are helping to expand the offers that visitors can now experience in the city

- ATDW, 2016

Increasing the Capacity

Air Access

Puerto Rico has to connect with the world, physically and metaphorically, in order to develop its visitor economy. Approximately 4.6 million people (FPR, F.f., 2016) arrive at our International Airport in Isla Verde every year, barely 50% of its actual capacity of 9 million passengers. Many other destinations would envy these numbers. This means that we can accommodate many more fights, and that we can increase the number of visitors to the island by 4 million; without expanding the airport. This is without mentioning the other airports in Puerto Rico that receive foreign flights.

Puerto Rico has good air access from several US cities. This large two-way flow of Puerto Ricans to the US, is precisely what guarantees the capacity of these flight routes. They are also the means through which most visiting tourists arrive. The island also has short direct flights between several Caribbean islands; and cities like Panama, Bogota, Madrid, and more recently, Merida (Cancun), London, and some Nordic capitals. There is no question that as the number of direct flights from important population centers in the world to San Juan increases, so does the access to new markets. Thus increasing the number of visitors from around the world to the island. Pursuing these markets must be a strategic priority. International destinations, require bilateral treaties to establish routes, and closely working with the federal government for their implementation¹⁸.

Another priority should be obtaining authorization from the federal government to open the international transit lounge. This allows passengers arriving from international flights to continue on to another international destination, without passing through an immigration process. This would largely facilitate the effort to obtain direct flights to San Juan from key international points. For example, it would be more convenient for a flight operator to have a flight originating from São Paulo, Brazil, to include passengers moving on to other Caribbean islands, or even Oslo or Stockholm; without having to go through the immigration process that involves entering and leaving the United States.

The long-term goal would be turning Luis Muñoz Marin International Airport into an international and intercontinental hub, expanding the number of airlines

and cities served with direct flights, from and toward different continents. This expansion of direct air connections would attract a larger number of visitors to the island. It would also enable strategic alliances with airlines, and facilitate international commerce of local companies with the world.

While the international hub is developed, a large number of flights between San Juan and all six airports from New York, Orlando, and Miami are an opportunity for increasing the number of visitors to Puerto Rico. Each year, dozens of thousands of travelers from important cities in the world (example: Paris, Rome, Warsaw, Tokyo, Beijing, or Bombay) arrive at these airports, and do not have direct service to San Juan. These travelers, without having to plan a trip to Puerto Rico, could combine an add-on visit to the island in their itineraries. They would only have to board a short domestic flight, without having to clear immigration and customs.



PIn order to become a globally renowned destination, Singapore promoted the development of its international airport as a global hub for connecting their country to important cities and countries around the world. By turning their airport into a global hub, Singapore harnessed one of its major strategic advantages: its good geographic location. As a strategy to increase the number of international flights, the government signed open-air agreements with over 90 countries, thus facilitating access for international travelers. Signing these agreements resulted in a 21% passenger increase. In order to make these travelers spend a few days at their destination, Singapore's Tourism Board created a series of incentives to attract local and international investment. These focused on hotels, resorts, and the transportation industry to help increase the destination's capacity, and the number of offers and attractions. Also, a large part of public spending focused on developing cultural and tourist attractions to motivate visitors into extending the length of their stays.

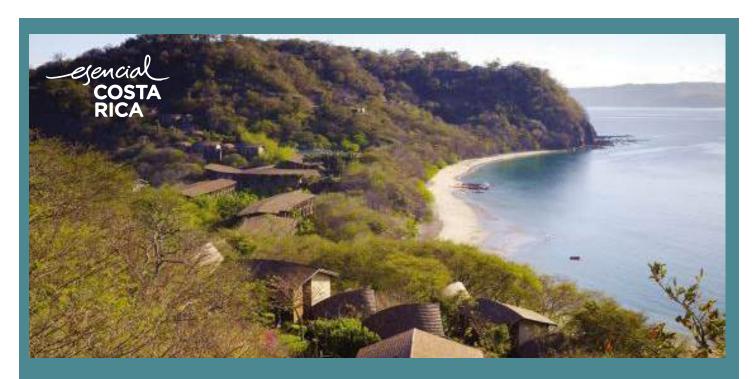
- Airport, 2016

Sea Access

Cruise ships – Today over 1.4 million visitors arrive at San Juan aboard cruise ships. This represents a 5% of the global cruise-ship market, with a recent annual growth of about 10%. The San Juan port has the capacity to drastically increase the number of passengers. In comparison, the Nassau port in the Bahamas receives about 3.5 million visitors each year.

Adding the potential for cruise ships to stop at the different ports in Puerto Rico, such as Ponce, Mayagüez, and Ceiba; the island could become one of the most important cruise destinations in the world. In order to achieve this, it is vital to have the necessary infrastructure cruise ships need at a small and large

scale. We also need to have the attractions to offer the experiences that visitors look for. Vieques and Culebra could also become an important destination for small cruise ships. Our archipelago can create a recreation circuit similar to the Virgin Islands. Or an educational and ecological one similar to the Galapagos Islands for boat tourism or charter rentals; by developing moorings infrastructure. Small cruise ships and vessels can depart from Puerto del Rey Marina in Fajardo, and travel to Culebra, Vieques, Icacos, Palomino, Culebrita, etc. The southwest part of the Island can have a similar circuit from Mayaguez, Ponce, Cabo Rojo, Guanica, and Salinas. All of these natural assets in Puerto Rico are underused, and undervalued.



As a strategy for boosting the growth of the cruise industry in Costa Rica, the government is betting on small cruise-ship attractions that can provide tours from several harbors and regions, even when there is no place to dock. This has resulted in an increase of cruise ships visiting small destinations all over the territory, thus helping to expand the economic impact throughout the industry. Also, these small cruise ships are an attraction for travelers from non-traditional markets who want to enjoy more authentic experiences, diversifying visitor's profiles even more.

Transportation Networks

The most successful destinations around the world have integrated transportation networks that offer a variety of alternatives and solutions. The key is that visitors have their individual needs, and preferences satisfied within this set of transportation choices.

Today, our transportation network limits visitors' access to mainly tourist areas; those areas where you can find most large hotels such as Condado and Isla Verde; or areas with specific attractions like El Yunque or Toro Verde. There is no available transportation to many other destinations, making other areas of the island practically inaccessible. In order to accommodate a larger number of visitors, and remain a sustainable destination; Puerto Rico needs to have an agile, flexible, and diverse transportation network available to facilitate the visitor's travel.

Our priority is to develop a transportation network that combines the different alternatives (mobile platforms, public transportation, ground and sea, taxis, rentals) that efficiently connect our visitors and residents with a set of alternatives that allows them to come and go to all the places they need or want to visit. This in turn would connect them to a diverse, geographically dispersed offer, with extended hours or at all hours. This network should be supported by

a digital infrastructure, and technological tools that allow visitors to obtain information, both for learning about the different alternatives that are available, and for using the network and its components in an integrated manner. This would connect our visitors to offers and experiences throughout the island, and address their individual needs and preferences.

The following is an analysis of the components of transportation in Puerto Rico, and discussion of their potential for strengthening and integrating this system into the Visitor economy:

Taxis: Taxi services are currently focused on visitors arriving at our main entrance points, such as the international airports and ports, and connecting them to the traditional hotel and tourist areas, such as Condado, Isla Verde, Old San Juan, Miramar, Santurce, and other highly frequented destinations. Other than these destinations, taxi availability is very limited, even non-existent, since these are not accessible through digital media, and radio dispatch services have few available units. In order for taxis to overcome their accessibility limitations, outside these main tourist points, they must integrate more modern technologies to their processes, like mobile platforms.



Considering the importance of taxi service, especially in areas with a high volume of tourist activity, it is necessary to know the rates in advance. We should also offer the technological tools that provide visitors the capacity to calculate rates, and easily identify where to take a taxi.

Mobile Transportation Platforms - A large part of our diverse experiences and destinations are found outside the main tourist areas or oven outside the metropolitan area. Visitors do not have alternatives for transportation, except maybe private car rentals or tours, to easily and quickly access the offers in other places of the island. Mobile platforms, like Uber and Lyft, are a key element for developing the Visitor economy. They ensure that visitors and residents easily reach and access points of interest and experiences (gastronomical, cultural, ecological, historical, or social) both in San Juan, and outside the metro area. Mobile platforms give visitors the opportunity to reach places that are currently not easily accessible without a personal car, which translates into expanding economic activity generated by the Visitor economy.

Car Rental Services - Given the lack of integration between the different transportation alternatives available, and a culture of car dependence that dominates Puerto Rico; car rentals are a critical element for facilitating visitors' movement throughout the island. With this option, most visitors can explore different destinations throughout the island, and enjoy the countless experiences offered by our geography. For this, road and physical signage must be improved in order to guide visitors with relative ease to destinations, attractions, and to essential local services.¹⁹

In digital map systems used in navigation (like Google Maps), any lack of information regarding road infrastructure, and physical, updated directions to destinations and businesses must be addressed. It is necessary for the safety and convenience of the visitor, regardless of the limitations caused by cell-phone

provider contracts, that they are able to access cellphone data at least for essential services.

Ground public transportation - The main destinations in the world have adapted their public transportation systems for visitors' use because they understand its importance as part of the visitor's experience at the destination.



An example of this is London where they have made information regarding the different components that makeup the public transportation system more easily available. It also provides information on its routes, in several languages, designed a centralized website, and mobile app allowing visitors to obtain information, and even plan their trip in advance form a single place by identifying the different transportation alternatives they can use to reach their destination

- Transportation, 2016



Puerto Rico's public transportation system consists of the Tren Urbano or subway system located in the metropolitan area, the Metropolitan Bus Authority (AMA, by its Spanish acronym), Metro Bus, public microbuses (known for the local term of pisicorre), and other services offered by municipalities such as trolleys, and others. Unfortunately, the system does not interconnect nor work dependably, at the expense of all of its users, and it definitely doesn't take into account visitors' needs. There are several factors that limit the use of public transportation alternatives by visitors such as limited hours, lack of accessible information on routes and itineraries, the lack of appropriate signage, and the fact that the information is not bilingual.

In order to adapt our public transportation system for visitor use, it is essential to digitally make visible the public transportation alternatives that we have available in the metro area, and the rest of the island. We have to provide correct and updated information on routes and itineraries. Considering that the system is currently inefficient for residents, and only provides access to limited areas, not necessarily of interest to visitors, we have to focus on transportation alternatives that integrate into the public transportation system.

In addition, it is important to improve service reliability by guaranteeing that it complies with the established frequency, improve the lighting in terminals, stations and stops; so that visitors and residents feel safe and confident in using the service. A transportation system adequately prepared to tend to visitors by facilitating mobility, particularly for those who travel with a limited budget, represents a key alternative for expanding the number of visitors. It would also improve the quality of life of our residents who are currently obligated to depend on deficient public transportation.

Public Sea Transport - Sea transportation is another key element of the transportation network that strengthens the Visitor economy. It mainly serves both visitors and residents traveling to Vieques and Culebra, island-municipalities; important destinations that attract thousands of visitors from all over the world. This service is notorious for its inconsistency, deterioration, and deficiencies that affect its stability, frequency, and dependability; despite its importance to these islands' economy, and the importance of these municipalities for strengthening Puerto Rico as a destination for the world. There is also insufficient information accessible about available tickets, and there are service interruptions at any given moment.

It is necessary to give priority to maintenance services for ferries, and develop trustworthy tools that allow visitors and residents to obtain general information about the service (such as trip frequency, service problems, among others). The tools should also allow visitors and residents to acquire tickets electronically, and access any other information that is necessary for the service to run smoothly. Considering the government's current fiscal situation, in order to improve the quality and efficiency of the service, it is urgent to privatize the service, and guarantee its quality and efficiency. Let's improve the accessibility of the information on this service, not only for our visitors, but also for our citizens; let's make it easier for everyone to purchase a ticket with a trust-worthy service.

Lodging for Visitors

Increasing the capacity of visitors requires relying on sufficient lodging options to accommodate them. Puerto Rico currently has various options, approximately 15,000 rooms endorsed by the Puerto Rico Tourism Company. Among these are resorts, hotels, inns, lodgings, condo hotels, bed & breakfasts, and others. There is also a significant amount of rooms that are not endorsed by the Tourism Company; mostly private properties available for rent (like Airbnb), which offer a tremendous opportunity for increasing accommodations for visitors, without needing to invest large amounts of capital.

With the 2008 real estate crisis, there are a large number of properties that are available that should be singled out as lodging for visitors. For example, in Miramar there are housing complexes that, after the crisis, have become lodgings for visitors. This helps visitors connect to local experiences, and provides an opportunity for additional income for owners of unused properties. In the long run, it also increases our lodging capacity.

With the development of what is known as a collaborative economy, today, travelers are increasingly looking for non-traditional lodging available through platforms such as Airbnb or Join a Join. These allow owners to rent their properties to local and international visitors, increasing the lodging capacity in different cities all over the world. This type of lodging appeals to markets with different budgets, and travelers who seek to enjoy local experiences at their destinations.

As emigration and available properties increase throughout the island, we should refocus many available properties to serve visitors. This would increase and diversify our lodging offer without requiring large capital investment from the public or private sectors.



New York is an example of the impact that collaborative platforms like Airbnb offer for increasing the availability of accommodations, and economic benefit in the Visitor economy. In a single year, the company generated \$632 million in economic activity. Eighty-two percent of registered properties are located in communities outside Manhattan, expanding the direct and indirect effect of the Visitor economy to traditionally non-tourist areas; and increases lodging alternatives using existing infrastructure, without the need of large investments.

- Airbnb, 2016

Project Financing

The visitor economy is a platform that provides many opportunities for sparking entrepreneurship in a variety of activities and specialties. This can range from restaurants, accommodations, to technology startups that develop digital platforms and tools that help improve the visitor's experience (in all of its dimensions). These types of business projects and initiatives can help expand the offer throughout the island, creating countless of new, authentic experiences available to visitors. Today, there are only a few financing alternatives available that support or promote the establishment and growth of projects, microbusinesses, and small businesses that develop innovative products that improve the visitor's

experience; and that directly or indirectly impact the Visitor economy or help increase its capacity.

In order to promote the creation of projects, microbusinesses, and small businesses in the visitor economy, it is necessary to increase the availability of capital sources, and financing alternatives that support these types of projects. These sources can range from crowd lending platforms (like Kiva Zip), and crowdfunding; to the arrival of investors and other alternatives that help increase the availability of capital; whether local or international, for projects that benefit the visitor economy, and include elements of innovation.



In order to promote innovation and entrepreneurship in tourism, Spain's Ministry of Industry, Energy, and Tourism created a financing program called Emprendetur. This program assigns approximately 50 million euros each year to finance businesses projects that introduce innovation in the tourism industry. The goal is to support research, development, and innovation applied to products and services in the tourism industry; in order to help improve competitiveness and profitability in Spain's tourism industry; as well as to help nurture the business ecosystem of young entrepreneurs.



In 2014, as part of the different financial alternatives emerging in Puerto Rico to support self-management and entrepreneurship, the Kiva Zip platform was launched. Kiva provides loans at 0% interest for entrepreneurs with projects that positively impact the economy. During its first year, Kiva Zip granted over 22 loans to entrepreneurs offering products, and services related to the Visitor economy, for a total value of \$107,800. Available financing alternatives for entrepreneurs with business projects or initiatives related to tourism help create a range of unique offers and experiences that promote our development as a desired and attractive destination.





Information itself does not provide solutions. It only allows us to begin a process of comparing and visualizing; that eventually will lead to obtaining relevant data that has shaped the concepts we want to understand. The way we design these, is by using available data. This will allow us to interpret and evaluate the information to build the structures that will take us to the necessary knowledge, and deep understanding to find answers and take action.

Our organization is convinced of the need to improve statistic measurement systems of our entire tourism industry. Furthermore, in the broader concept of the Visitor economy. As we described in our publication, The Visitor Economy: From Knowledge to Action, there is a series of challenges or limitations in the type of data, and the frequency with which we gather information today.

Even though these challenges should not be an obstacle to implement strategies for the development of the Visitor economy, we have to face them in order to evaluate our progress, compare ourselves with the world, and timely identify the adjustments that are needed. We specifically refer to documenting the sector's historic data, monitoring the progress of initiatives, evaluating changes, and making adjustments in due time.

Monitoring the Strategy



ollaborative efforts from all stakeholders within the industry's ecosystem are the fundamental basis for a common agenda, and its action plan. A key element for the success of any strategy is to maintain a clear, follow-up system, and constant evaluation that allows the measuring of levels of progress, and success for every proposed action.

Defining strategies, roles, responsibilities, and resources that are available to articulate a shared vision does not mean we have reached our goal. It only means we've begun. In order to reach our goal, we must make sure that strategies are carried out. We have to establish the monitoring controls that are required to review our progress compared to the strategies, and keep the country informed.

Continuous monitoring allows us to work in real time with the behavior of each and every component of the Visitor economy. We would then be prepared to identify and act against observed deviations, and to discard or modify those that are not effective. We must observe factors that produce positive or negative effects on the execution of the strategies designed by stakeholders of the ecosystem.

The monitoring system should include, besides proposed actions, specific mechanism for following up in terms of progress and success. To do this, it is important to create a series of specific indicators and goals, determine the time of execution, and analyze the expected results.

Following up on the progress of indicators and goals gives way to immediately making all the necessary adjustments, which reduces the probability of obtaining results that are different from projected ones. This system should be available to the public as a permanent reference tool for those who have an interest in verifying the industry's development and progress. But above all, it should be available as an effective tool for those who are responsible for formulating and approving public policies.

A progress measurement system is an optimal and necessary management tool. It also makes for a transparency mechanism, allowing for accountability regarding the effectiveness of actions and invested resources. Today's society demands precise data, and results of the activities that affect or benefit them.

Transparency in Results

he visitor economy is an economic development strategy in which individuals, private organizations, and the public sector interact throughout our entire geography. Its positive impact on the economy can be significant. This is why we have to keep a public monitoring and follow-up system, that allows for the transparency required by economic development and public finances.

These evaluation and strategy processes require transparency to ensure that all the stakeholders of the ecosystem participate in the public debate regarding the sector's future. It is not enough that government administrators and guild leaders be broadly informed about the sectors development. If we want an ecosystem development we need every stakeholder, especially service providers, to be aware of the industry's current status, tourism progress, and changes in global trends. This level of linkage will allow these stakeholders to integrate into development plans, and complement initiatives at a macro level.

Our definitions and terminology must be clear in order to have a common language that allows us the capability of reaching fine conclusions about tourist dynamics. It is necessary to develop a National System of Tourism Statistics (NSTS) that allow us to provide trustworthy, and consistent statistic data regarding all socioeconomic aspects of tourism. This should include statistics, validation sources, gathering processes; as well as the definition of concepts that are internationally accepted, and applicable to Puerto Rico.

The development of a NSTS is closely intertwined with developing a tourism satellite account (TSA), which Puerto Rico does not currently have. While developing a TSA is an exercise integrated into a country's national account system, a NSTS is a more comprehensive exercise that serves as a platform for the planning and collaboration among all important stakeholders of the tourism ecosystem; from the government to service providers. A NSTS is the ecosystem's guide for measuring progress.

In addition to sector statistics, a NSTS includes definitions, concepts, and socioeconomic impacts associated to tourism activity. Let's look at the NSTS as a centralized and accessible data platform that serves as a tool for everyone. It is important to point out that the NSTS is much more than tourism statistics on a website, it also includes mechanisms and processes for managing data quality. We are specifically referring to two components: quality control processes in data production, and documenting processes and methodologies to obtain them. These elements are essential for establishing, and maintaining a National System of Tourism Statistics. According to the World Tourism Organization, some characteristics of a good NSTS are:

• Data Relevance: It is important that the information be useful for multiple stakeholders within the ecosystem (not just the government). It would be unacceptable for the government to be producing information regarding tourism that is unavailable to the sector for planning and decision making.



PICTourism Philippines Improving Competitiveness in Tourism

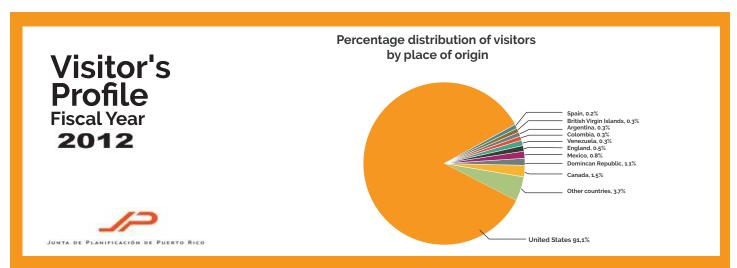
In 1997, the Philippines' National Statistics Board created an Interagency Statistics Committee with the purpose of serving as a guide in developing statistics for the sector. The committee is co-directed by the National Statistics Board and the Department of Tourism. The committee has other members including other government agencies and private sector organizations. The committee first reached agreements on methodology, information gathering, data publishing, coordination, and information systems development. After these first agreements, a series of interagency agreements and commitments were created to form a NSTS and a TSA. As a result of this effort, the Philippines was able to develop their tourism satellite account.

- Precise and Trustworthy Data: To do this, we have to evaluate the source of information, and the methodology used. For example, in Puerto Rico's case, data on lodging published by the Tourism Company does not include unendorsed hotels, nor information on private rental lodging, such as Airbnb. Another example was published in our latest study (FPR, F. f., 2016) in which we identified challenges with the Planning Board's methodology for calculating the visitor's expenditures.
- Data Frequency and Timeliness: It is important for the system to determine a reasonable frequency, and for it to comply with set dates for making the information available. The last visitor's survey in Puerto Rico was done in 2012, and the results were published in 2015. For information to be useful, it has to be published on time, and in more frequent intervals for decision making. That is, the reference period cannot be every three years, but at least every quarter.
- Clarity and Accessibility: It is necessary to facilitate access to information produced by the government. For starters, all information on tourism should be available at a single site; not scattered throughout different agencies. In addition, the information should be in user-friendly formats. This is why we suggest consulting different stakeholders of the ecosystem regarding their format preferences, and about visualizations to be used.

• Coherence and Comparability: Published information should be standardized and pursuant to statistics regulations, and national accounts. Government data bases should also be coherent. That is, we cannot have an agency saying one thing, and different agency saying another.

In order to create a NSTS with these characteristics it is important to have adequate governance. There are several agencies in Puerto Rico that are currently in charge of gathering and disclosing data. However, there is no centralized governance for handling processes, methodologies, and information systems regarding sector data. Before engaging in interagency agreements, that already exist, we must first establish a structure that can operate, and maintain the NSTS.

This structure should assign roles and responsibilities to different agencies, and if necessary, non-government organizations. After designing the structure, we would have to consider the need for adapting existing legislation, and if necessary, creating new legislation in order to provide a legal framework pursuant to the proposed structure. In order to operate the NSTS, it is crucial to assign an agency or organization in charge of system monitoring and coordination. This provides a single point of reference for all the stakeholders of the ecosystem; regarding tourism official statistics.



Puerto Rico recently created an alliance between different government agencies in order to carry out a Visitor's Survey. In addition to the Planning Board, the Tourism Company, the Port Authority, and the Puerto Rico Institute of Statistics (all government agencies); Foundation for Puerto Rico joined in the effort. The Foundation plays a key role in looking after the continuity of this effort; in case of a change in government administration. Likewise, the Foundation has the commitment to integrate input from different interest groups within the sector in order to keep them connected to this initiative. This alliance represents a new multisector approach that can serve as an example for carrying out other initiatives in which the government requires active collaboration, and participation from civil society, such as the National System of Tourism Statistics.

In Puerto Rico there are three (3) agencies that can take on this managing role. Let's begin with the Tourism Company since it establishes the public policy on tourism in Puerto Rico. Despite its role in carrying out public policies, the Company currently does not have sufficient resources in the statistics sector to comply with the demand to coordinate and monitor all NSTS process (this is due to the fact that a large part of these functions are under the Planning Board). Then realistically speaking, the Planning Board could lead this effort, since they are already in charge of the government's effort to update national accounts. The third agency that would be able to assume a managing role is the Puerto Rico Institute of Statistics. The Institute lacks specialized knowledge in tourism, and has limited resources. But it's the agency that establishes the standards for statistics for the entire government. Any of these three agencies can serve as the coordinating entity. But of course all of them would have to make personnel and budget adjustments. A non-conventional alternative would be to assign the necessary resources and responsibilities to a nonprofit, non-governmental organization to be in charge of system coordination and management. This entity could count on the resources and knowledge from

different government agencies. Even though the coordinating non-governmental organization would not have the power to establish public policy; it would have some sort of authority to ensure compliance with NSTS objectives.

In addition to compliance with designing and compiling general statistics; it is necessary to measure impact segments, niches, and trends.²⁰ When relevant, this information should reflect and adapt itself to our particular circumstances. For example, differentiating US travelers from foreign travelers, as well as Puerto Ricans who migrate, and travel back home; because each category has different behavior patterns and consumption.²¹

Transparency in all of these processes, and integration of non-government stakeholders is fundamental for any initiative, including this one because it helps identify resources, monitor progress, and make continuous improvements in methodology.



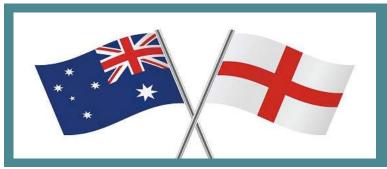
With a growth of over 20% in two years, New Zealand has particularly payed attention to the importance of measuring and accounting for its results. The government developed a work plan for economic growth that takes into account all the dimensions of the Visitor economy which is noted for its meticulous statistics that help us understand the macroeconomic forces that shape the global tourism market. New Zealand has detailed information regarding satellite accounts, visitors' expenditures, passenger arrival, and growth projections that help monitor their goals.



Mexico, who had a 20% increase of visitors in 2015, stated the importance of focusing on developing diversified strategies for its destinations; not just on the traditional sun and beaches. Among their transversal objectives, they proposed democratizing productivity and gender equality. They developed eleven project indicators, measuring the economic-growth gap between Mexico and the world, productivity, quality, increase in financing sources, increase in non-American visitors, participation in the US market, index compared to the base year, and finally satisfaction among citizens regarding visitors. These indicators help them assertively monitor their progress toward established goals.

20 In 2002 Act No. 228 was passed; allowing the Tourism Company to request from all businesses endorsed by the agency the necessary statistic data, with the purpose of developing a data base that allows more effectiveness in modeling and planning.

20 in 2002 Act in 0.226 was passed; allowing the Tourism Company to request from all obstriesses endorsed by the agency the necessary statistic dark, with the purpose of developing a data base that allows more effectiveness in marketing and planning.
21 Law No. 7-2016 was passed to improve research, analysis, and use of tourism statistics for the industry's adequate planning. The explanatory memorandum states that the Tourism Company currently limits its studies and research to passenger movement, room inventory, average rates, demographic origin for check-ins at hotels and inns, and monthly fluctuations of check-ins. Furthermore, these records do not reflect any information for developing and implementing marketing strategies, such as percentage of returning visitors, main reason for visiting, expenditure amounts, factors contributing to selecting Puerto Rico as a destination, evaluation, and recommendations for improving our tourist offer. The law stresses that the University of Puerto Rico, in collaboration with the Tourism Company, may assume a key role in promoting, developing, and improving tourism in Puerto Rico under a research context. A report by the Senates Tourism Committee details the type of research that the Tourism Company shall be in charge of, and the result of all research shall be published at least once a year, on or before June 30.



England and Australia both made arrangements for defining their measurement strategies and indicators in order to effectively communicate results to the people. Australia designed a model to measure indicators, goals, and responsibilities, as well as presenting a periodic progress report of the necessary projects, and investments for ensuring strategy success. England, on the other hand, detailed necessary indicators and methodologies for measuring.

Transparency and continuous evaluation go hand in hand. We have already covered the need for indicators and goals to measure the sector's performance, and the need to create a national system of tourism statistics. We believe that all these elements should be included within a single platform. Furthermore, we recommend a leading entity to coordinate and monitor NSTS, and this very same entity should lead the efforts for monitoring strategy and evaluating results.

The first thing that should be done at a short and midterm is a plan for tourism development. We recommend that the coalition proposed in previous pages elaborate this plan. That said, the plan should be founded on measurable and useful results for all stakeholders of the ecosystem. The plan should have the following elements:

- a detailed description of the situation analysis for each strategic objective, established for each area;
- a description of the strategies, projects, and initiatives for objective compliance;
- a description of external factors, independent from the coalition's control, that could affect reaching the objectives:
- a description of the level of collaboration with other government agencies, and with the private sector for maximizing resources and achieving the goals established in this plan.

The NSTS' leading entity must also be responsible for coordinating the elaboration of the plan, and evaluat-

ing the goals and indicators associated with it. In addition to having the plan and indicators available in a digital platform (as in the NSTS), we recommend that the coalition carry out public sessions to evaluate the plan and performance indicators. During these sessions, as part of its plan, the coalition should present a progress report of strategies and indicators carried out during the past year.

The progress report should identify the unachieved goals of the desired objectives. These public sessions will give all the ecosystem's stakeholders the opportunity of participating, and contributing to the continuous evaluation and monitoring of it all.

Once the public session process ends, the coalition should present a report on them that includes the input from all the participants:

- an analysis of reports submitted by coalition entities;
- an analysis of evaluation system results;
- recommendations for improving the plan results for the following year.

By establishing an NSTS, a transparent and continuous evaluation, and monitoring structure accessible to all in the ecosystem, we can adapt and integrate the entire ecosystem into a common goal which is developing the Visitor economy, and turning it into a true national priority.

Continuous Evaluation

here are many variables that can affect the sector's growth. Establishing rigorous, continuous evaluation and improvement processes helps us understand existing tourism projects, as well as marketing and advertising strategies, which help make better decisions for the future. The evaluation process is highly important in developing a coherent and sustainable public policy.

This monitoring and follow-up system is fundamental in making decisions concerning key industry elements, such as investing on infrastructure projects, government incentives, advertising campaigns, academic and training programs, among others. destination strategies for development and commercialization. Understanding real and potential trends in social and economic areas, as well as changes in individuals' behavior, is important when it comes to implementing an adequate strategic approach. Evaluating industry trends may be achieved by conducting visitor surveys, statistical research, and global trend analysis. Knowing and being up-to-date with what is happening throughout the world is important in order to be able to take advantage of the opportunities brought by the Visitor economy.



Canada's tourism industry created an alliance with Visa Canada to provide information on travelers' expenditures in order to better understand travelers' behavior, where they come from, where they are going, what do they spend money on, and how this varies by country. They also analyzed the expenditure behavior of Canadians who travel abroad. This analysis showed dramatic contrast between the two factors. During the summer of 2015 international visitors travelling to Canada spent \$3.6 billion, while Canadians spent \$5.3 billion while traveling abroad. These numbers prompted a strategy to exhort Canadians to explore their own country or destination called Keep Exploring. This took advantage of the purchasing power that would otherwise leave the country.

- TIAC/VISA, 2015

Indicators and goals are a clear base for understanding the trends of several industry components. In turn, trends become a very useful tool for evaluating proposed actions, and final adjustments. The tourism industry is constantly changing, therefore, it is indispensable that those who comprise it continuously adapt to its context, both in daily operations, and in



This is an example of the complexity of visitors' motivations, and the need to understand the different factors that influence travel. If marketing campaigns have little influence, then we have to evaluate the budget that was spent, and refocus the campaign. This is why we insist on using complete evaluation models that allow us to identify the campaign's actual impact compared to the invested capital.

Using complete statistic models is highly important. But we can also progress by using less rigorous efforts (statistically speaking).

At Foundation for Puerto Rico we believe in using different mechanisms to obtain information about visitors. And not all of these have to necessarily comply with a statistical accuracy. We believe in the need for a representative survey, such as the Planning Board's travelers survey. But we also believe in carrying out efforts such as Canada's to obtain information regarding visitors' motivations. We recommend conducting a survey at the airport; visitors would have access to it as they connect to the airport's Wi-Fi. This would require little investment, and could provide us with a

large amount of information that we do not have. This does not substitute the travelers' survey, but it would serve as its counterpart.

On the other hand, the evaluation of metrics and follow-up process give an insight to those matters that require special attention and consideration. They are a key guide for developing research and studies that will strengthen the strategies. In addition, these processes allow us to study our strengths and weaknesses, and to promote the creation of centers of excellence that contribute to fortifying the entire ecosystem. This information also helps us to transform our weaknesses into opportunities so we can concentrate on, and keep increasing our potential in a sustainable manner.



In 2007 Canada's Ministry of Tourism sent letters to 85,000 visitors living in the United States. Seventy-one percent of participants sent a reply. Although this exercise did not constitute a representative sample (due to the replies' bias), it did reveal a large amount of useful information for the government to validate other studies regarding the US market. For example, 76% of participants revealed that they used the internet to plan their trip, and 46% went on the advice of friends and relatives.



Changing our Way of Thinking

"We cannot solve our problems with the same thinking we used when we created them."

-Albert Einstein

lbert Einstein transformed the world by using only his imagination. Sitting at an office desk at a government agency in Switzerland, he devised an innovative and profound explanation about how the universe behaves; changing the path of civilization. If not for Einstein's way of thinking television, laser, GPS, the digital world, and nuclear bombs would not exist.

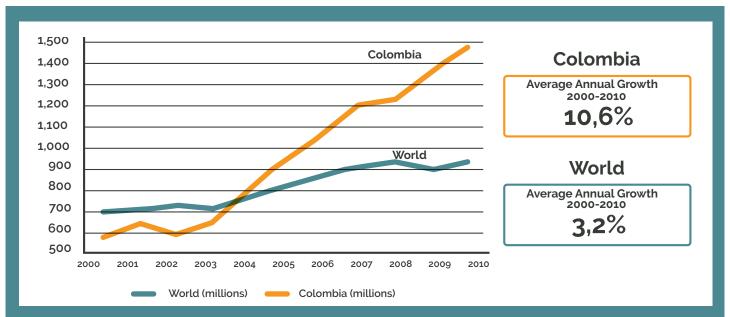
In Puerto Rico, we can and have the power to change our way of thinking in order to transform ourselves, and thus change our economic trajectory, and create an impact sufficient for us to return our island to prosperity.

Our ways of thinking affect our society at every level. Many times they become shared beliefs that numb us, and become an obstacle for transformative change. Our leaders, entrepreneurs, social leaders, and the entire population have to acknowledge that we cannot

simply conform to surviving, and complain about our island's current unsustainable models. In order to be prosperous we have to take the risk of changing the model. We must unite in order to face the crisis, and wake up not only to the dangers of sustainable inertia, but also to the opportunity that transformative change brings.

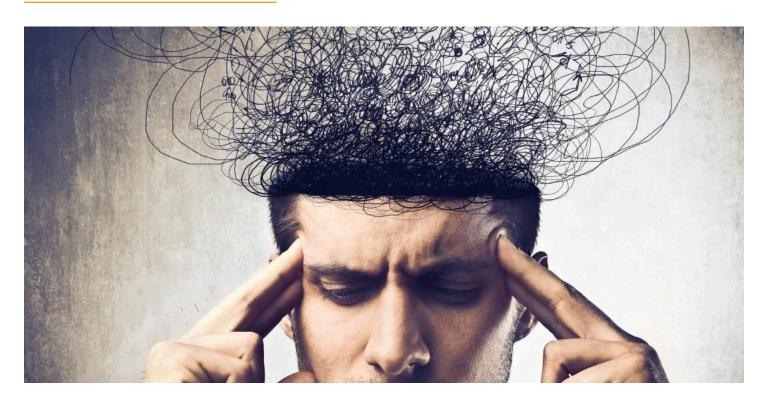
Changing our way of thinking requires that we open ourselves to new possibilities and horizons. Throughout the globe, nations and societies with long, well-established traditions and behaviors have reexamined their models, triggering transformative initiatives, and even radical ones; to pursue new opportunities.

Our proposal is simple – Let's develop Puerto Rico into a Global Destination. To achieve this, it is necessary that all residents, communities, economic sectors, business, social and government organizations and their leaders develop new perspectives and dramatically elevate the priority of this project, not just in terms of what we think but also of what we do. It is also necessary to appeal to our collective psyche - all of Puerto Rico has to commit to this issue, think big and convey to the world that we believe and attest that Puerto Rico is the destination they want to visit.



Right in our backyard we have the example of Colombia. Garcia Marquez described Colombia's lethargic inertia, and horrifying violence in One Hundred Years of Solitude. During the first decade of the twenty-first century, its society came together to face these evils, and become a model for transformation and progress. Every one of its citizens made it a point to turn the country's reputation around, and have the world focus on its beauty and other assets.

Thinking Profoundly



"Thinking profoundly about the root of social problems, and critically examining how to respond to important daily issues is a requirement for conceptualizing change.."

- Project Innovation

ne of the most powerful tools human beings have is our ability to create mental models that use the information that is available in order to immediately understand and react to a situation. This allows us to avoid dangers, and seize immediate opportunities. Our instincts, impulses, and hunches are the manifestations of this great gift of our specie's evolution.

We evaluate any situation with the available information, and we safely and confidently advance on the path dictated by our mental model. But this same confidence, and assurance that allows us to react quickly—which were essential during prehistoric times for running away from a lion or for hunting a rabbit—many times makes us forget that our known universe always lacks information.

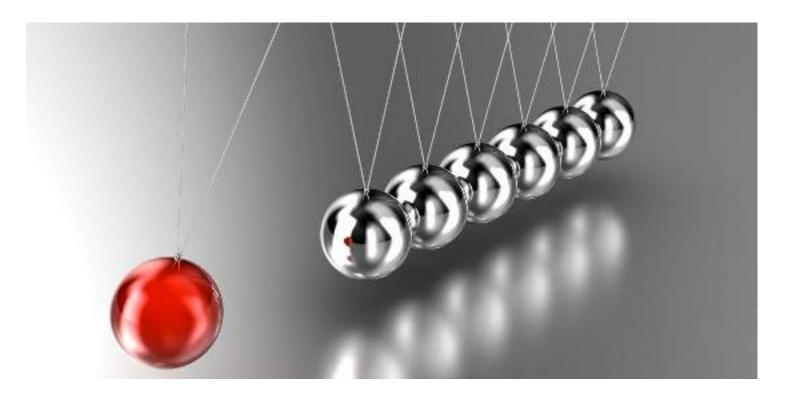
This becomes a problem for individuals, and more

so, for societies when the situations that we want to solve are more complex, and require more information, analysis, and evaluation. The discipline of researching, and acquiring a vast, and valid knowledge before building our mental model is fundamental for achieving transformational change. We must start with—against all of our instincts—the assumption that the solution lies in what we do not know; and that we have to explore an unknown world to discover it.

Peter Drucker once pointed out that making good decisions depends on the dialogue of several points of view, and choosing from different judgements. Thinking profoundly means that we must challenge all the premises that make us feel safe. This allows us to actively search for alternate models that are the opposite to our current ones, because within these new models lies our future's undiscovered solutions.

Now more than ever it is important for Puerto Rico to ponder the things we know, and be aware of the things we do not know. This will allow us to critically analyze, and identify strategies and alternatives that will help us overcome the crisis. What we know about tourism today is not necessarily what will take us to the next level.

Ending Inertia



Inertia lies in our habits, in our daily lives, and in the stories we tell ourselves to define what we can or cannot be or do. Ending inertia means separating ourselves from the stories or myths that we consciously or subconsciously create to describe in simple terms the world that surrounds us. Since these models are based on the premise that the world is more constant than changing (a concept with which our prehistoric ancestors relied on), they limit us in times of accelerated change because they impede us from assimilating new knowledge and information. They also deprive us from opening ourselves to new opportunities and from achieving transformation.

In order for Puerto Rico to become a destination for the world, it is necessary to examine historic perceptions of tourism that make up our common policies, and break, through evidence and logic, with fallacies or myths that have denied us of our potential in the tourism industry, and limited its development as an important economic strategy.

Taking this first step requires that we understand the importance of the Visitor economy, beyond the concept of traditional tourism. We have to end the preconceptions which we have created over the years. We

have to visualize new models that transform the way in which we act. This will be the only way we will be able to see new ideas as possibilities, and not as impossible dreams. This will allow us to stop for a moment, and evaluate our known surroundings, and ponder new ideas that will make us advance in the path to our economic recovery.

It is necessary to put the visitors' economy as a top priority and start working as allies developing all the elements necessary to inspire potential visitors to choose our destination, explore our entire geography and participate in a variety of memorable experiences. This will multiply in quantity and prolong their stays, which will generate the economic impact we need so much.

In order to succeed in this project we must all adopt a welcoming mentality or culture through which we can understand and commit to the importance of achieving that every visitor's stay consist of unique and memorable experiences; greeting them with the warmth and kindness that sets us apart. These visitors, immersed in our hospitable culture and humanity, moved by their experiences and by the personal bonds developed during their visit, long to return to Puerto Rico, transforming them into our ambassadors.

Myths and Assumptions

We have identified several myths and assumptions regarding tourism. In each box we present a brief explanation of the realities and opportunities that, from our perspective, contradict these perceptions about the Visitor economy. They must be taken into account in order to take any call to action.

Tourism is a second-rate economic activity that will never have an impact large enough to change our economic path.

Globally, the Visitor economy represents 10% of total economic activity, and also 10% of Puerto Rico's economy. It is also the only sector that is still growing. Its size can be doubled in five years, thus stabilizing the economy. There is no other sector that can offer such a growth within this timeframe.

Tourism is rather applicable to underdeveloped countries, like other Caribbean islands. But it doesn't apply to Large and sophisticated economies like Puerto Rico's.

Important countries like Japan, the UK, and France (the world's 3rd, 5th, and 6th largest economies) strategically prioritize their Visitor economy and receive approximately 22, 34, and 83 million international visitors every year. Puerto Rico is a privileged destination, very well established for tourism, and has much more to offer than other Caribbean islands that limit themselves to offering sun and beaches.

Tourism is a high-price market. Puerto Rico is an expensive destination, and therefore not competitive. The Dominican Republic, and now Cuba "are completely beating us."

The world tourism market is enormous (1.2 billion visitors per year), and has several niches and opportunities for very diverse offers. The Dominican Republic has achieved growth with a low cost, "all-inclusive" offer suited for Europeans. And now Cuba is pursuing a similar model, and will become a more direct competitor for the Dominican Republic. However, Puerto Rico has many advantages that these two countries do not have in infrastructure, internal accessibility, bilingualism, security, and the freedom to move individually that make our island stand out very favorably, and that ensure us a very exploitable niche.

There are many other destinations with more tourist attractions such as beaches, climate, casinos, etc.; and Puerto Rico's offer is not competitive with these destinations.

The precise advantage Puerto Rico has is not that its beaches are beautiful (there are plenty of Caribbean destinations that rely on their coasts) or that its climate is better (it is the same as the rest of the Caribbean's), but the diversity of our offer, and the combination of many advantages at the destination. This all separate us from different Caribbean destinations. Puerto Rico is a combination of different offers like climate, natural beauty, fine cuisine, cultural, and historic offer; convenient air, land, and sea accessibility; the fact that it is a domestic destination for US residents, under federal protection; and a sophisticated physical and digital infrastructure with a compact and accessible geography.

Tourism advertising is expensive, and Puerto Rico, with limited economic resources, will never achieve media presence that other better endowed destinations have.

Our budget for tourist promotion is comparable to Hawaii's and California's, although smaller than Florida's, France's, the UK's, or Mexico's. The challenge we face is not so much the size of the budget allocation for tourism, but rather what it is spent on, and how market strategies change due to changes brought by election cycles or changes in government administration. Puerto Rico cannot compete in the global market as long as it keeps projecting itself as a sun and beach destination. There are enough of these already. The island must differentiate itself with a set of unique qualities and experiences that any potential visitor can aspire to enjoy during an extended stay.

Puerto Rico is in "very bad shape" to be successful in tourism. This affects tourists' experience. Before tending to visitors, we must fix all of our problems.

There are no excuses for not cleaning or maintaining our island for the benefit of everyone. Doing this makes us a better destination. We cannot think that visitors look for a cosmetic replica of their home. They seek authentic experiences, even adventure. Many times they explore places with worse reputations than Puerto Rico's, with much larger security risks. In many parts of the Dominican Republic, and in some parts of Mexico, visitors are recommended not to leave their immediate tourist areas for security reasons. Puerto Rico is a very safe place. With all the things that have to be improved, it is important to know that visitors' reaction to their experiences in Puerto Rico is highly positive.

Tourism grows due to international wholesale intermediaries, such as travel agencies and wholesalers, hotel ,chains, and airlines or cruise lines.

Historically, these intermediaries have been an important source of visitors. But as commission agents with many destinations to offer, they tend to not give a priority to what Puerto Rico offers. Instead they make it compete with other destinations. In a digital age, we must move toward an increasingly more direct interaction with potential visitors. Have them visualize the destination in detail, develop an appetite for the experiences we offer, and even directly plan their own itineraries by using the available technology.

Tourism's economic benefit is limited to direct providers like hotels, transportation operators, and, in the case of cruise ships, tourist stores in Old San Juan.

The visitor's economic benefit involves direct expenditures in hotels, transportation, and other services for visitors such as retail shopping, fine dining, and tickets to cultural events and activities. In addition, the visitor's economic activity indirectly impacts all the businesses that support direct providers, suppliers, wholesalers, service providers (including the government), banks, builders, farmers, etc. Finally, all the salaries earned by individuals working for the industry, directly or indirectly, are spent on the local economy for yet another extremely important impact. According to the WTTC, the sum of these three economic activity components almost triples the Visitor economy. Without tourism, Puerto Rico's economy would decrease by more than 10%.

Tourism does not grow as much because the island is already receiving the maximum number of visitors possible, and there is no more hotel capacity for significant growth. There is no capital to invest in its growth either.

Puerto Rico can easily double the activity of its Visitor economy in 5 years by using strategic promotion that not only increases the number of visitors staying in the island by two million, but also extending the length of their stay by two days. Current hotel capacity includes not only hotels, but also over 10,000 available short-term accommodations. Emigration by hundreds of thousands of Puerto Ricans during the past decade ensures an almost endless amount of accommodations that can be developed with low capital investment.

Tourism jobs are of low wage, poor quality, and are only available during specific seasons.

Jobs generated by the Visitor economy are not limited to hotels or taxi drivers. They include multiple dimensions of direct, indirect, and induced economic activity; resulting not only in the creation of jobs throughout the economy, but also in creating many more opportunities for self-management, family owned businesses, and generating revenue in communities. By changing from a sun-and-beach destination to a destination with a diverse offer with events and attractions distributed throughout the year, Puerto Rico's tourist activity will extend throughout the entire year, and so will jobs.

The Zika virus will eliminate every opportunity for expanding tourism, and in any case, reduce visits.

Reactions to the Center for Disease Control's (CDC, by its acronym) warning of neurological abnormalities caused to a fetus during pregnancy by this virus (and we must acknowledge that just one child being affected is a tragedy) is having a negative effect on tourism. It is also affecting the entire Caribbean region, including Cuba, the Dominican Republic, Brazil, and the southern US. We cannot let this be an obstacle. It is very important to assertively, and timely address the fears of potential visitors, and tourists. Provide them with updated information, and clearly advise them about preventive measures, and precise recommendations for high-risk groups. For example, at the recent Olympic Games in Brazil, women who planned to become pregnant were advised to avoid getting pregnant at least 8 weeks after departing the country. Visitors were also insistently advised about using repellant to avoid mosquito bites.

Changing Narratives

We must end the inertia caused by decades-old ways of thinking that are not suitable in today's evolving world. It is necessary to change common narratives occurring in our economic context, and limit us; in order to create alternative narratives that empower us, thus building a new future for Puerto Rico, founded on the opportunity of turning us into a destination for the world. Hereafter, we include examples of narratives and beliefs about our economy. We also include alternative narrative suggestions that take into consideration the opportunities that the twenty-first century offers us, in tourism and other areas, helping us promote this great economic transformation project.

Expanding the manufacture and exports of physical goods with an emphasis on the pharmaceutical industry.

Alternative narrative — Promote the research, commercialization, and exportation of innovation. In order to strengthen the Visitor economy, we must prioritize novelties that strengthen us as a destination, and that differentiate our capacities for tending to potential and actual visitors. This would include those who come for recreation, for an education, improve their health or retire, to those who come to undertake, innovate, and export.

Maintaining agriculture of traditional products with subsidies to achieve food safety.

Alternative narrative – Promote sustainable agricultural development with the technology, and twenty-fist century knowledge. This should be for both local consumption (which means relief from the impact of imports), and for exportation, thus generating new income, and economic growth from well-developed niches in the world market. Turning Puerto Rico into a destination, and a center to exchange knowledge for agricultural experts, investors, and researchers from all over the world.

Boosting economic activity by promoting imported consumer goods, and the propagation of supply chains and multinational wholesalers.

Alternative narrative – Focusing on local production and businesses by refocusing the offer of consumer and service businesses, from restaurants to literature, arts, and music destinations, retail sellers, and banks, toward tourism and exports.

Reducing work costs and benefits to increase "productivity" of a shrinking private sector.

Alternative narrative – Expanding the private sector with local production, innovation exports, and the growth of our tourist destination in order to create more jobs and thinning down fixed costs. The Visitor economy is the most powerful instrument for short and mid-term growth because it creates values that translate into genuine productivity.

Keeping jobs within the government as a social obligation, and a budget priority for the executive.

Alternative narrative – Profoundly study, redesign, and reorganize the government and its agencies in order to provide the services that are needed in the twenty-first century, so that Puerto Rico can compete with the world, and advance its development strategies. Train and mobilize employees in order to assume new responsibilities, and the skills needed. Transformation should begin with the entities and services that impact our capacity as a destination, and interact with a diverse visitor profile. This redesign urgently includes institutions that are a part of the public education system.

Increasing federal and local government capital projects to strengthen construction; stimulating the economy.

Alternative narrative – Understanding that construction is not an economic development sector, but a tool used for creating the infrastructure needed for supporting sustainable strategies for economic growth, and that the accelerated growth provided by the Visitor economy will create demand for infrastructures.

Using government capital to provide financing or guarantees for private sector projects, such as hotel development or other private businesses.

Alternative narrative – Understanding that the world capital market is large and diverse, and that any private project with a chance of success must obtain financing in this market. Promoting and facilitating the creation of multiple investment vessels, beyond the government, for several niches of the Visitor economy, and that they are adequate for all the phases of the organizations which they intermediate.

Visitors from Asia, and important countries like China will not influence our tourism industry because these travelers would have to cross long distances to come to Puerto Rico. Besides, they can go to Thailand, the Philippines, the US West Coast, and Hawaii, because these are affordable destinations with a large number of accessible short, daily flights; saving hundreds of dollars and flight hours. Also, it is important to mention that granting visas to Chinese visitors, for example, is not in our hands, and is extremely regulated by the US.

It is true that the lack of sufficient direct flights, and the long relative distance of some destinations may reduce the number of potential visitors. But it is important to remember that these are markets are so large—with hundreds of millions of international travelers—that capturing a million or two is not unreasonable. Every direct flight translates into more than 70,000 visitors per year. If we could add 12 daily flights from these European and Asian origin points, we could generate over one million additional visitors. Nevertheless, the alternative that we propose until we increase the number of direct flights—which must be a priority—is promoting Puerto Rico as an "add-on" destination or an extension package to trips that millions of people already make from Europe and Asia to the US East Coast.



Taleb Rifai, OMT Secretario-General

Extractos de entrevista por Skift: Sobre el poder transformador mundial del viaje

Skift

During the past five or six years, it is clear that China has become the top traveler-originating destination in the world. Six years ago it was Germany. China has not only established itself as the leading tourist originator. But it has done it by a large margin: In 2015, 130 million Chinese people travelled. This is a 30% growth compared to the previous year. Let's stop and think about this. In 2000, China barely originated 10 million international visitors. In 16 years, this figure increased from 10 to 130 million. These 130 million people spend \$290 million dollars, an expenditure rate of \$2000 per passenger, per year. This is mora than 80% of the average public spending per tourist in the world.

When the Chinese travel, they spend their own money, their friends' money, and their creditor's money. They go shopping, buy things, and take them home. Their impact on the economy is incredible. Regarding global tourism, he said, "Just last year we had a 4.5% growth, an additional \$15 million from 2014 figures, for a total of 1.2 billion international travelers crossing borders every year. It's fantastic. Think about it for a moment. In 1950, after World War II, there were only 22 million international travelers. This number has increased to 118 billion. There is no industry in the world, no other human activity that has grown more exponentially than the travel industry. It has become part of our daily life, a part of our culture."



Foundation for Puerto Rico invited several collaborators to comment and share their impressions on this strategic vision. Here are their initial contributions.



TOMÁS RAMÍREZ

President, Combate <u>Beach Parador</u>

Parador Combate Beach Resort started its operations on December 2010 in Cabo Rojo, Puerto Rico; when the family group acquired a small 17-room inn that had closed for business. Today, after four expansion phases, the parador or inn has 48 rooms in 10 different models, and commodities to cater to the different needs of visiting families.

At the time of purchase, a master plan (with established goals and metrics) was already in motion for expanding the property in five years. Besides concentrating on the physical plant, the plan also included a marketing strategy to increase the product reach, at a local and international level, and to contribute to the development of the Combate community. The goal was to turn Combate into a world-renowned tourist destination since the region already had cultural, ecotourism, and gastronomic attractions to offer.

The new owner's vision was rooted on the idea that surpassed having a profitable business for himself. He wanted to develop opportunities for his community by placing Combate as a destination in Puerto Rico, promoting a local quality experience. From the very first day his actions were guided by the motto: "think local, live local, buy local, and hire local." The staff that was hired was mainly from the local area. Over 2 million additional dollars were invested in renovations and expansions. Skilled professionals, contractors, and technicians from the local area were also hired.

A significant amount of the materials, furniture, and equipment purchased was from local hardware stores, distributors, and contractors. Two Puerto Rican cabinetmakers made the entire hotel's furnishings. Over 80% of em-

ployees working on the hotel's operations and supervision are residents of El Combate, and El Corozo. This created 26 direct jobs, and an annual injection of over \$300,000 in payroll to the communities' economy. Furthermore, over \$80,000 are invested annually in maintenance, renovations, construction, and technical professional services; using resources from nearby communities. This is an important contribution to the economy of Cabo Rojo, a municipality with a population of 50,917; of which 45.5% are individuals over 18 years of age living below the poverty level, and an unemployment rate of 17.1.

Today, over 18,000 new guests and visitors from all over the world arrive at the inn and the Combate community every year. Until July 2016, 65% of guests were local and 35% were non-residents, this figure includes Puerto Ricans living in the United States. There has been a noted increase in visitors from the US coming to the region from places like Alaska, and also in foreigners from places as far away as China, Japan, Russia, Australia, Argentina, Africa, Canada, Iran, Norway, Sweden, among others. The owner says that in order to encourage visitors' consumption in businesses outside the property, Combate Beach offers food service during limited hours and promotes its guests visiting local restaurants that have fine cuisine, an excellent gastronomic offer. Conservatively, it is estimated that these visitors annually invest over 1.4 million dollars in restaurants, kiosks, pharmacies, bakeries, gas stations, and other businesses and tourist operators in the region. Several economists estimate that every direct job at a hotel or parador can generate up to an additional five indirectly related jobs.

The parador's management team also collaborates with

the Municipal staff of Cabo Rojo, the Tourism Company, and several government agencies in order to ensure cleaning and décor, lighting, signage, and security in the area. The municipality, regional state and federal agencies have implemented several large-scale projects for tourism development of El Combate. The result is that now tourists are arriving throughout the entire year. During the past three years there has been a substantial, and constant increase in the number of tourists arriving at El Combate during the summer's high season.

Without a doubt, these planned and coordinated efforts have sparked a rebirth of El Combate as a destination. There has been an increase in investment and renovations in existing businesses, and new tourist operators and businesses have opened. The parador's management is currently working with the municipality's tourism office, and the Puerto Rico Tourism Company to turn the El Combate beach area, and the Los Morrillos lighthouse into a renowned wedding destination.



DENNIS R. ROMÁN ROA

President, Centro para Puerto Rico/Fundación Sila María Calderón

"THE VISITOR ECONOMY AND COMMUNITY ENTREPRENEURSHIPS"

The Visitor economy would open the market to a vast variety of business projects carried out today in Puerto Rico. The boom of community-based entrepreneurship rooted on empowerment and self-management principles entails a new offer for visitors with unique qualities because it is culturally rich and connects with our traditions.

Many of the emerging businesses that have become part of this boom are based on a local gastronomy, traditional Puerto Rican history. Together with owners of new, smaller, customized paradores or inns, they are offering a new experience to our visitors. Other projects are developed by artisans offering new choices for visitors, an example of Puerto Rico's artistic and creative richness.

This revitalized entrepreneurship, on many occasions led by women, brings a variety of offers that go beyond traditional products. These offer services that were once found solely in commercial centers or specialized places, today are found throughout the country. This stimulates economic development, and a reinvestment in the communities from which they serve.

If the island opens its doors to visitors, community entrepreneurship will be there to serve as a support system, and also grow along such an important element of Puerto Rico's economic development.



RAMÓN DAUBON

Collaborator

"A CITIZEN'S ECONOMY"

The challenge we must consider is working together to look for a way in which multisector agreements spark practices that help identify a shared, single direction toward action. They would also lead to positive economic measures from citizens, both for their immediate communities and the entire country. Puerto Rico already has a number of networks, and agreements that cover several sectors. But these tend to work separately, and often opposing one another. Every sector presents its own particular vision that seeks to superimpose similar efforts over the other; instead of thinking as citizens-that is, each sector keeping its own particular vision of the world, but committing first to the common goal of building a stronger local economy. This challenge requires we take a better look at which individual, community, and institutional practices may spark—or otherwise discourage—this citizen's economy. It should particularly focus on the role the agreements and their networks play in consistently building relationships, establishing connections, and generate processes that can now support these productive civic interactions, locally and nationally.

The most necessary and fundamental change of mentality is acknowledging, at an individual and collective level, that the base of any economy is civic commitment to a collective success. The best formulated public policy is destined to fail without a citizenry that feels they are an essential component for protecting its execution. "It's up to me" is perhaps the best attitude for anyone interested in the economic health of his or her immediate environment, city, or country. Any entrepreneur clearly understands that his or her business' success depends on having commercially-capable clients and suppliers. But perhaps the fact that they also depend on a trustworthy, predictable institutional and legal order that guarantees that the performance standards and protection of the business are reliable and transparent; is not that obvious. It is the responsibility of the citizens, as economic stakeholders that connect and work along with his/her neighbor, to protect this setting. The Visitor economy is especially suitable for "binding together" all of Puerto Rico in this shared effort.

MAYRA SANTOS-FEBRES

Writer/Poet

"CULTURA Y ECONOMIA DEL VISITANTE"

The two main assets that Puerto Rico has for strengthening The Visitor economy are its geography and cultural differences. Our beaches, ecosystems, and cultural heritage feeds off and is complemented by our vast cultural offer when it comes to gastronomy, music, literature, art, dance, sports, medicine, and agriculture. Until now, we have focused our tourist offers in the northern area—the capital—and we have ignored the large, almost unexplored possibility of cultural offers throughout the rest of the island that can easily enrich any visitor's experience at a global level.

This is why our vision of the Visitor economy gives priority to Puerto Rico's arts and indigenous culture, turning it into a valuable tool for the economy's program and development.



It is very important to develop means of transportation, or mechanisms that are technological and visual, that make it easy for international visitors to have access to and enjoy all kinds of festivals. There are music festivals (like Día Nacional de la Salsa, Loiza Patron-Saint Festivities, etc.), food festivals (SOFO, Maricao's Coffee Crop Festival, Rum Festival, etc.), literary festivals (Festival de la Palabra, Salinas Used Book Fair, International Children's Reading Day, etc.), film festivals (Horror Film Fest, Queer Film Festival, San Juan Cinema Fest, etc.). This way visitors will extend the length of their stay in Puerto Rico in order to enjoy the wide range of cultural and ecological experiences that already take place on the island, but have remained invisible and inaccessible to them.



LUZIRENE MENDOZA

Partner & CEO, TBWA San Juan

In 2014 Foundation for Puerto Rico (FPR) began developing an innovative concept that would allow the world to see Puerto Rico's attributes, and think of it as a destination. In the past years, TBWA \ San Juan became an important collaborator of FPR in designing this innovative concept. The project focused on developing a digital platform with unique features that would awaken the potential visitors' curiosity and interest of living an authentic experience in our island.

TBWA \ San Juan is part of TBWA Worldwide, an international network of digital strategies with offices in 97 countries. The agency collaborated by incorporating all its resources during the stages of research and carrying out the digital platform to promote the Visitor economy in Puerto Rico. The challenge: creating a digital marketing program that would position Puerto Rico as a unique destination, in an extremely competitive global market, by designing a plan that would not be perceived as advertising, whether paid or traditional, and which would connect the island with other audiences such as the US, Canada, Western Europe, Latin America, China, India, and other emerging markets. TBWA used their global colleagues to carry out an online survey in 21 countries. The gathered information revealed that the main obstacle in promoting Puerto Rico as a unique destination is a lack of awareness, and not having a distinctive brand in the global market. The survey also pointed out other opportunities for attracting visitors such as increasing projection of the diversity and attractions we already have, communicating the benefit of being part of the US (passport and currency), highlighting anecdotes of positive experiences visitors have had, and effectively becoming part of the digital world.

As part of the platform design, the team developed a series of digital marketing key initiatives that would present every service, attraction, or experience that has to do with Puerto Rico's Visitor economy. One was providing inspiring content that would capture potential visitors' interest so that they would want to read, comment, and share it. This content would have the potential of turning visitors into ambassadors of Puerto Rico; without being perceived as advertising. Another method would be recruiting local staff who are already avid promoters of the island in platforms like Instagram and Twitter to disseminate content. One example is the hashtag #ILiveWhereYouVacation; and another is creating a story in "Amazing 100", where the best 100 successful stories of Puerto Rico are acknowledged for a given year. These stories can cover different fields such as the economy, sports, innovation or personal growth.

The digital platform has 3 main areas or functions:

- 1. Content development: focused on stories that spark potential visitors' curiosity from the very moment they start looking for inspiration for their trip. The stories will focus on attractions, personalities, and topics of interest regarding Puerto Rico. The work group will be composed by a varied team of reporters, special collaborators, and others who will send the content to the media, and those who have special influence in identified markets.
- 2. Ambassador conversion systems, ACS: An ACS system will have a tracking system to identify the patterns of use of our visitors, the frequency and their interests; in order to ensure that users find and receive the content they want and what they are searching for as fast as possible. This system will have the capability of serving the user or visitor from his/her arrival to departure. The intent is to be able to welcome our visitors, provide them the necessary assistance during their visit, and make sure that their experience is so good that they want to come back; thus becoming ambassadors for Puerto Rico.



ALAN TAVERAS SEPÚLVEDA

Co-founder, BAIS Puerto Rico

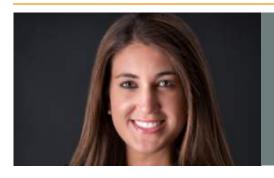
While studying abroad in Argentina, I had the opportunity of living a full Argentinian student life thanks to BAIS (Buenos Aires International Students). Upon returning to Puerto Rico I discovered, with the help of Denisse Rodriguez, local co-founder, Campus Puerto Rico; even though they limited their academic offer. We found an opportunity to improve international students' stay in the island while boosting the Visitor economy. Today, we have served over one hundred international students by means of tourist activities, and nightlife; as their expenditures exceed thousands of dollars in local businesses and Puerto Rico's university systems. BAIS PR has become an extended family for international students on the island.

TERESTELLA GÓNZALEZ DENTÓN

Dean
International School of Hospitality and Culinary Arts
Universidad del Este



The role of academia is crucial in changing mentalities to give priorities to visitors. We should also be consistent, and not discard what has worked just because someone else thought of it. For example, we must retake, expand, and upgrade some programs that worked in the past; like "Hello Tourist", which promoted the development of tourist guide programs in the Department of Education's vocational schools. We should also integrate into our primary education a sense of appreciation, pride, and satisfaction for service. We should also strengthen historic and cultural knowledge of our island so that we can all become good hosts.



ISABEL RULLÁN

Co-founder,
ConPRmetidos

I think that we should develop tools of references that are easy to access (podcasts, digital maps with audio-narrated routes, etc.) so that service providers such as taxis, can share historic facts, curiosities, and information about Puerto Rico with visitors while they are on their way to their lodging accommodation; from the moment they leave the airport. Other helpful tools would be calendars of festivals and activities so that our service providers can let visitors know about cultural events occurring during their stay.



FERNANDO LLOVERAS SAN MIGUEL

President, Para La Naturaleza

The Non-profit organization Para la Naturaleza protects high-value ecosystems as well as historical heritage sites. It receives over 70,000 local and foreign visitors annually that participate in tours in rivers, forests, caves, historical places or carry out some sort of volunteer work.

As part of their mission to inspire visitors to also be guardians of Puerto Rico's ecosystems, their offerings are educational. Hence, besides enjoying the best our islands have to offer, visitors learn and do their part to protect them. This includes planting native trees, threatened species reintroduction projects, archeological research, and citizen science initiatives.

Para la Naturaleza demonstrates the potential of promoting sustainable tourism practices. Tourism development is aligned with the protection of our most valuable resources. Each visitor has the capacity of driving our local economy while at the same time contributing to the conservation of what distinguishes Puerto Rico: its natural beauty and historical legacy



Foundation for Puerto Rico has undertaken the task of researching, analyzing and developing knowledge on the visitors' economy. This effort gains value by openly sharing this knowledge through the creation, publishing and distribution of studies, articles, dialogues, forums, and alliances with private and public entities and persons within the tourism sector and other sectors, as well as the general public. Our main purpose for sharing this knowledge is to increase it, address it, enrich it with new perspectives, and transform, it through exchanges, into the development of joint strategies and coherent collective actions.

In this strategic vision document, we have repeated once and again that we are convinced of the potential the development of the visitors' economy represents to revert the economic recession Puerto Rico has been under for more than a decade. The new travel markets that have opened in Asia, Africa, and Latin America have made the tourism and global travel industry into the fastest growing economic segment. The opportunity is immense, all destinations, even emerging ones, are growing. Puerto Rico cannot stay behind; we are an amazing destination for the world.

The First step in *Going Forward* in this direction is to incite a change of mindset and take a new look at our environment and peel away that veil of pessimism that today blurs our vision. The *#yonomequito (#idon'tgive-up)* attitude is essential. It is important to begin from admiration and to value the richness there is in the diversity of the many natural, cultural, recreational, sporting, gastronomical, and human resources we have, all connected by a world-class infrastructure that puts us at everyone's reach. They are there.....waiting for us to pay attention to them and give them the opportunity to become our best calling card.

Our indifference towards all of our abundance is shocking to those that visit us, and to many locals as well. The challenge IS NOT what is lacking, but what can we do with the assets we have to generate the economic activity that would result in essential services and opportunities for all. Let's set aside our disdain, let's change our attitude and share with the world how passionate we are about our island and its treasures. Let's make visitors fall in love with us, let us plant in them the seeds of curiosity of coming closer, the desire to get to know

us, and once they are here let's make sure to captivate them by experiencing our essence in such a way that they will tell others and will want to come back.

To achieve the **2+2** goal, 2 million additional annual visitors that extend their stay in Puerto Rico by 2 days, it is imperative to truly believe, from the deepest in our souls, that **WE ARE** that great global destination. And then, proud of what distinguishes us, skillfully insert ourselves in the media game and project everything we have to offer through all the means possible in order to be found through any search method they desire.

Let's develop a digital data clearinghouse where will store relevant and interesting information for the visitor of all the places there are to visit, the interesting stories to be told, the curiosities, cultural, artistic, recreational and sporting events, and much more, that exist in all the corners of our islands and are the essence of the Puerto Rico we want the world to know. Let's have universities, hotels and inns, rural and urban communities, and municipalities work collaboratively in order to fine comb the whole island and gather the complete offer of authentic experiences. Then, let's place that information in the hundreds of existing online platforms where potential visitors from all over the world look for inspiration at the moment of choosing their next destination. In the XXI century, we must use technology to reach them and communicate with them in their own language.

It is necessary to work with discipline and agree to commit to a *Citizen's Agenda* that focuses primarily in driving Puerto Rico's transformation as a global destination and a unique place to live, work, study, visit, invest, launch new ventures and export. This strategic vision framed in the visitors' economy is inclusive and sustainable, provides a space for all, incorporates the diverse dimensions of our development and ties together all sectors in one same frequency and in *One Single Voice*: education, transportation, technology, safety, Health, art and culture, environment, agriculture, business, etc.

We will reach 2 + 2 and much more when we are willing to think big and long term, with hard and consistent work to create the conditions that will consolidate Puerto Rico as a global destination. When we *Hit the Ground Running* and schools and universities teach

various languages to our students so they can learn to communicate with the world. Let's imagine that Puerto Rico decides to do an immersion program in Mandarin and German, being China and Germany two of the main tourism travel exporters, and that it would also certify 1,000 people at a competent level in each one of these languages in the commercial, health and academia fields among others in the next 3 years. Let's project that those property owners whose properties are losing value, many of them retired elderly and whose children and family have left the country, condition and convert those rooms and empty structures into rooms, hostels and guesthouses to rent them to visitors, which would increase and diversify our lodging capacity in a sustainable manner.

Let's visualize all those Puerto Ricans with cooking, baking, carving and dancing skills, teaching or demonstrating to our visitors how to prepare pasteles, alcapurrias, tembleque, or how to carve a Saint or dance Salsa; activities they could plan, schedule, and pay online with a direct deposit to the local providers' account. All of this before even setting foot in Puerto Rico. How many days could we add to their travel itinerary and fill them with experiences, products and coordinated routes that take them all over the island?

Let us think of our youth, who are so savvy with digital technology that focus their creativity in the development of apps that visitors can access from their cellphones and find audiovisual recordings in the voice of our people telling them stories of the places they visit, offering tour and companion services, in this way making visible other places they could visit. Let's look at the farmer that invites the visitor to spend their night in their farm and the next day takes them to milk the cow, pick coffee, cacao, and to prepare the dinner they will eat that night. Let's make our theater shows with subtitles or audio descriptions in other languages so our non-Spanish speaking visitors can also appreciate and enjoy the talent of our artists.

Let's become experts in the profiles, tastes and customs of visitors from countries like Great Britain, India, and Korea so we can understand their idiosyncrasies, preferences, expectations on service hours so that we can entice them and serve them better. Let's propose to im-

prove our competency in the English language, which is the universal business language, and attract to Puerto Rico the establishment of multinational companies that would create good employment opportunities and the export of the local products. Let us include local products in our hotel and restaurant menus, to consume what is *Made in Puerto Rico* and start to reduce imports. Let's agree on a common starting point, let's establish the goals to be pursued in regards to the number of visitors, new access routes, contributions from the economic sector, employment generation, etc. Let's trace the road map to follow, let's be rigorous, consistent, and transparent in the execution of strategies to achieve them and to measure progress.

The tourist or visitor that comes to Puerto Rico represents jobs, additional resources to the treasury for essential services, entrepreneur opportunities and sustainability for existing businesses and services. According to Oxford Economics, "statistical studies in the past two decades have indicated that countries with a robust and growing visitors' economy have had a superior economic performance in comparison to their peers" and increasingly, statistics of emerging destinations in developing countries show a positive correlation between tourism's growth and the improvement of the general economy and quality of local life. The new demand for services and amenities created by the visitor bring new resources that help improve transportation, lighting, parks, public safety, etc. When looking at the tourist, let's look at an opportunity and take advantage of each interaction to treat them with dedication, respect and sensitivity and show them that more than just being a marvelous destination, the best thing Puerto Rico has is its people. Let's change the individualistic approach which is the result of scarcity and let's go out to the world Together for Puerto Rico and snatch the big price. This is the project that could unite us, in which we can all come together to work.

At **Foundation for Puerto Rico** we are convinced that to reach the potential that the visitors' economy promises it is not enough for our political leaders to declare or legislate in favor of tourism from up above. We invite all those that find a resonance with this message and that believe in this proposal to become part of the equation by joining the **2+2**, we all are Puerto Rico.

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