UNWTO INSTO Meeting

Buenos Aires Tourism Observatory

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Madrid, 22-23 October 2018
<table>
<thead>
<tr>
<th>¿What we do?</th>
<th>¿Why?</th>
<th>¿For whom?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Collect accurate data</td>
<td>• To position Tourism as a strategic activity for our city</td>
<td>• Government</td>
</tr>
<tr>
<td>• Transform information into knowledge</td>
<td>• To orientate decision making processes at public and private level</td>
<td>• Private sector</td>
</tr>
<tr>
<td>• Comunicate key trends for the travel and tourism industry</td>
<td></td>
<td>• Entrepreneurs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Tourism suppliers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Associations and chambers</td>
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<tr>
<td></td>
<td></td>
<td>• Academic institutions</td>
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<td></td>
<td></td>
<td>• Press and Media</td>
</tr>
</tbody>
</table>
Our team is focused in 3 main areas of work

**Economic analysis**
- Economic impact
  - Employment
  - Investment
  - Market forecasts
  - International and domestic travel

**Qualitative research**
- Primary data collection
  - Surveys, interviews, ethnographic studies, focus groups.
  - Hotel occupancy
- Market segments: MICE, Cruise, Cultural, Gastronomy, Educational

**Big Data**
- Air connectivity
  - Hospitality
  - Gastronomy
  - Tourist mobility
Big Data

What is?
- Compilation, processing and analysis of large volumes of data

Sources of data
- Social networks, digital e-commerce platforms, administrative and electronic records.

New findings
- Identify trends, new opportunities, anticipate problems.
Big Data for travel and tourism

Obtaining data
- Private sector associations
- Entrepreneurs/professionals
- Suppliers and value chain
- Press and academic sector
- Digital platforms
- Social networks
- Administrative and / or electronic records

Processing and Analysis
- Methodology is key
- Accessible data
- Easy to understand
- Reports

Re-utilization
- Orientate policies
- Identify opportunities
- Anticipates problems
- Development of new demand
- Evaluation of actions/results

Decision making
Big Data: sources and partnerships

- Secretariat for Tourism
- Amadeus
- ANAC
- AA2000
- Migrations
- SEGITTUR

Air connectivity

- Hotel online platforms

Hospitality

- Gastronomy online platforms

Gastronomy

- Telefónica

Tourist mobility
Sistema de inteligencia turística

**Planeamiento del viaje**
- ¿Cuál es el interés para visitar Buenos Aires?
- ¿Cuáles son las principales tendencias y perspectivas de reservas de vuelos?
- En qué fechas buscan? Cuando quieren viajar?
- ¿Cómo se posiciona Buenos Aires frente a otros destinos?

**Conectividad aérea**
- La nueva política aerocomercial tendrá un alto impacto en la llegada de turistas a Buenos Aires.
- ¿Cuál es la conectividad de cabotaje e internacional de Buenos Aires?
- ¿Qué aerolíneas operan, con cuanta frecuencia y cuál es la oferta de asientos?

**Migraciones**
- ¿Cuántos viajeros entran y salen por las vías migratorias de la ciudad de Buenos Aires?
- ¿De qué nacionalidad son, desde qué países llegan, cuál es su edad y su género?
- En qué época del año prefieren visitar Buenos Aires?

**Turistas en Buenos Aires**
- ¿Cuántos turistas llegan a Buenos Aires? ¿Cuánto gastan y cuántas noches se quedan en la ciudad?
- ¿Cuáles son los principales mercados turísticos?

**Movilidad turística**
- ¿Cuáles son las principales zonas de atracción y barrios de Buenos Aires que visitan los turistas?
- ¿Existen diferencias entre el segmento nacional e internacional?
- ¿Hay patrones de movilidad según el origen, el género y la edad de los turistas?

**Competitividad hotelera**
- ¿Cómo se posiciona Buenos Aires frente a los principales destinos de América Latina en competitividad hotelera?
- ¿Cuáles son las tarifas de los hoteles y cómo afecta la anticipación de las reservas a los precios?
- ¿Qué servicios ofrecen los hoteles en Buenos Aires?
Tourist thermometer: Chile and Colombia

Since July, the arrival of Chilean and Colombian tourists to Buenos Aires began to increase, showing the first signs of growth after depreciation of the peso. The good performance of both economies is another factor that drives the departure of travelers.

Annual variation of the entries of Chileans and Colombians by Ezeiza and Aeroparque and by week of the year of 2018.

Fuente: ENTUR sobre base de datos de la Dirección Nacional de Migraciones y SECTUR.
During the last 2 months the volume of reservations from the main cities of the world to Buenos Aires grew 15%, showing an acceleration in the last 8 weeks.

ANNUAL VARIATION OF SEAT RESERVATIONS TO BUENOS AIRES FROM THE MAIN CITIES OF THE WORLD, BY DATE OF REALIZATION.
The West Coast of the United States begins to pull the growth of the United States to Buenos Aires. In addition, European cities, Auckland and Bogota show increases in reservations of more than 10%.

**ANNUAL VARIATION (%) OF THE RESERVATIONS OF SEATS TO BUENOS AIRES MADE IN JULY-AUGUST 2018.**

Var. i.a. (%)
Tourism prospects: new connection to Los Angeles

Since the new direct connection between Buenos Aires and Los Angeles that will start operations in December, air ticket reservations of that city increased 58% to travel in that month and 100% for January.

**EVOLUTION OF RESERVATIONS FROM LOS ANGELES TO BUENOS AIRES, BY MONTH OF TRAVEL.**

<table>
<thead>
<tr>
<th>Año actual</th>
<th>Período anterior</th>
<th>Período actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>enero</td>
<td>0.9</td>
<td>1.0</td>
</tr>
<tr>
<td>febrero</td>
<td>1.3</td>
<td>1.3</td>
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<tr>
<td>marzo</td>
<td>1.4</td>
<td>1.4</td>
</tr>
<tr>
<td>abril</td>
<td>0.9</td>
<td>0.9</td>
</tr>
<tr>
<td>mayo</td>
<td>1.0</td>
<td>0.8</td>
</tr>
<tr>
<td>junio</td>
<td>0.8</td>
<td>0.9</td>
</tr>
<tr>
<td>julio</td>
<td>0.9</td>
<td>0.8</td>
</tr>
<tr>
<td>agosto</td>
<td>0.8</td>
<td>0.8</td>
</tr>
<tr>
<td>septiembre</td>
<td>0.7</td>
<td>0.6</td>
</tr>
<tr>
<td>octubre</td>
<td>0.6</td>
<td>0.6</td>
</tr>
<tr>
<td>noviembre</td>
<td>0.6</td>
<td>0.5</td>
</tr>
<tr>
<td>diciembre</td>
<td>0.7</td>
<td>1.1</td>
</tr>
<tr>
<td>enero</td>
<td>0.4</td>
<td>0.4</td>
</tr>
</tbody>
</table>

Inicio conexión LAX – BA via American Airlines

Tourism prospects: new connection to Los Angeles

Fuente: Elaboración propia en base a Amadeus.
Air Connectivity
Prediction of future demand

We forecast future demand based on flight reservations and econometric models.

RESERVATIONS TO BUENOS AIRES MADE BETWEEN JANUARY AND AUGUST 2018, PER MONTH OF TRAVEL.

% OF CHANGE OVER SAME MONTH OF PREVIOUS YEAR

Source: Buenos Aires Tourism Board based on Amadeus
We estimate the flight occupancy rate to evaluate the performance of international and domestic routes.


<table>
<thead>
<tr>
<th>Country of Origin</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>EE.UU</td>
<td>91.9</td>
<td>88.4</td>
</tr>
<tr>
<td>México</td>
<td>85.4</td>
<td>87.2</td>
</tr>
<tr>
<td>Canadá</td>
<td>76.5</td>
<td>81.0</td>
</tr>
<tr>
<td>Francia</td>
<td>95.2</td>
<td>95.2</td>
</tr>
<tr>
<td>Alemania</td>
<td>95.2</td>
<td>94.9</td>
</tr>
<tr>
<td>Gran Bretaña</td>
<td>95.5</td>
<td>95.5</td>
</tr>
<tr>
<td>España</td>
<td>86.8</td>
<td>92.4</td>
</tr>
<tr>
<td>Italia</td>
<td>78.2</td>
<td>72.7</td>
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<tr>
<td>Holanda</td>
<td>72.7</td>
<td>67.0</td>
</tr>
<tr>
<td>Turquía</td>
<td>62.1</td>
<td>67.0</td>
</tr>
<tr>
<td>Nueva Zelanda</td>
<td>86.2</td>
<td>81.0</td>
</tr>
<tr>
<td>EAU</td>
<td>80.3</td>
<td>77.0</td>
</tr>
<tr>
<td>Qatar</td>
<td>68.1</td>
<td>68.1</td>
</tr>
<tr>
<td>Etiopía</td>
<td>41.5</td>
<td></td>
</tr>
</tbody>
</table>

Source: Buenos Aires Tourism Board in cooperation with National Secretariat of Tourism
Impact of the new connectivity: Norwegian

Since 2018, the percentage of British arriving at Buenos Aires in a non-stop flight increased due to the start of Norwegian operations.

% of British arriving by direct flight from London, per month. Years 2017 and 2018 *

Start of Norwegian flights (LON-BA)

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>ene</td>
<td>55.8</td>
<td>51.5</td>
</tr>
<tr>
<td>feb</td>
<td>59.7</td>
<td>52.1</td>
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<tr>
<td>mar</td>
<td>52.7</td>
<td>52.9</td>
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<td>abr</td>
<td>46.7</td>
<td>55.7</td>
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<td>may</td>
<td>39.5</td>
<td>41.3</td>
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<td>jun</td>
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<td>jul</td>
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<tr>
<td>sep</td>
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<td>oct</td>
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<td>47.2</td>
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<tr>
<td>nov</td>
<td>39.5</td>
<td>41.3</td>
</tr>
<tr>
<td>dic</td>
<td>46.7</td>
<td>57.5</td>
</tr>
</tbody>
</table>

Source: Buenos Aires Tourism Board in cooperation with National Secretariat of Tourism
% of outbound and inbound tourism per flight

% OF INBOUND/OUTBOUND PASSENGERS ACCORDING COUNTRY OF ORIGIN, 3RD QUARTER 2017

% of total of pax

Source: Buenos Aires Tourism Board in cooperation with National Secretariat of Tourism
Asian Market

The main connections of the Chinese tourists are made via Doha and Dubai.

Meanwhile, the Japanese tourists prefer to arrive via the United States and the route with New York became more relevant since the beginning of United Airlines operations.


- San Pablo: 13.1%
- Dallas: 10.2%
- New York: 9.9%
- Santiago de Chile: 9.0%
- Frankfurt: 6.3%
- Houston: 6.3%
- Lima: 5.0%
- Dubai: 4.0%
- Atlanta: 3.5%
- Toronto: 2.9%

Source: Buenos Aires Tourism Board in cooperation with National Secretariat of Tourism
Hospitality: Competitiveness, rates and tourist's opinions
Buenos Aires online hotel offer

Location of Buenos Aires hotels by neighborhood. February 2018

- 4 stars
- 5 stars
- Other hotels

Source: Buenos Aires Tourism Board based on hotel online platforms
Hotel rates of Buenos Aires, Santiago de Chile and Lima

PRICE PER NIGHT OF DOUBLE ROOM PER HOTEL AND AVERAGE PRICE PER CITY AND CATEGORY. JAN 22 - FEB 4 2018

Source: Buenos Aires Tourism Board based on hotel online platforms
Tourist’s evaluation of hotel services

According to different components of hotel services

**AVERAGE RATING OF TOURISTS IN HOTELS, BY CITY. FEBRUARY 2016 - JANUARY 2018**

<table>
<thead>
<tr>
<th>City</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buenos Aires</td>
<td>8.2</td>
</tr>
<tr>
<td>Lima</td>
<td>8.5</td>
</tr>
<tr>
<td>Santiago</td>
<td>8.5</td>
</tr>
</tbody>
</table>

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Source: Buenos Aires Tourism Board based on hotel online platforms
**Hotel prices on specific periods of high demand**

**PRICES (US $) 7 DAYS IN ADVANCE FOR STANDARD DOUBLE ROOMS IN 4 AND 5 STAR HOTELS.**

### 4 STARS

**MARCH 2018**

<table>
<thead>
<tr>
<th></th>
<th>Domingo</th>
<th>Lunes</th>
<th>Martes</th>
<th>Miércoles</th>
<th>Jueves</th>
<th>Viernes</th>
<th>Sábado</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>108.81</td>
<td>112.02</td>
<td>114.99</td>
<td>112.46</td>
<td>113.49</td>
<td>114.97</td>
<td>116.14</td>
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<tr>
<td><strong>6</strong></td>
<td>110.81</td>
<td>112.41</td>
<td>110.92</td>
<td>114.79</td>
<td>115.53</td>
<td>123.82</td>
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<td><strong>11</strong></td>
<td>112.10</td>
<td>111.22</td>
<td>112.10</td>
<td>114.11</td>
<td>114.49</td>
<td>114.70</td>
<td>116.40</td>
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<tr>
<td><strong>16</strong></td>
<td>107.33</td>
<td>109.11</td>
<td>108.69</td>
<td>111.39</td>
<td>137.33</td>
<td>148.28</td>
<td>140.06</td>
</tr>
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</table>

### 5 STARS

**MARCH 2018**

<table>
<thead>
<tr>
<th></th>
<th>Domingo</th>
<th>Lunes</th>
<th>Martes</th>
<th>Miércoles</th>
<th>Jueves</th>
<th>Viernes</th>
<th>Sábado</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>241.59</td>
<td>247.58</td>
<td>251.99</td>
<td>219.19</td>
<td>253.90</td>
<td>269.46</td>
<td>278.38</td>
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<tr>
<td><strong>6</strong></td>
<td>267.96</td>
<td>296.08</td>
<td>301.04</td>
<td>302.25</td>
<td>300.42</td>
<td>272.57</td>
<td>266.66</td>
</tr>
<tr>
<td><strong>11</strong></td>
<td>277.98</td>
<td>240.48</td>
<td>237.63</td>
<td>256.33</td>
<td>252.14</td>
<td>242.53</td>
<td>239.61</td>
</tr>
<tr>
<td><strong>16</strong></td>
<td>231.24</td>
<td>232.63</td>
<td>232.44</td>
<td>233.87</td>
<td>248.77</td>
<td>249.95</td>
<td>245.23</td>
</tr>
</tbody>
</table>

**Holidays**

- 29th y 30th. Thursday and Holy Friday.

**Events**

- 16th to 18th. Lollapalooza.
- 17th to 18th. 2nd meeting of deputies of Finance and Central Banks.
- 19th to 20th. 1st Meeting of Finance Ministers and Presidents of Central Banks.

Source: Buenos Aires Tourism Board based on hotel online platforms
**Prices according to day of the week**

**Prices (US $) 7 days in advance for standard double rooms in 4 and 5 star hotels, per day of the week. Period January - August 2018.**

*Source: Buenos Aires Tourism Board based on hotel online platforms*
Gastronomy
¿Where are the gastronomy establishments located?

The typical gastronomy of Argentina (grills and pizzerias) has a greater presence in all neighborhoods.

We identified **10 types of food and cuisines** according to their origin and cultural identity.

Númmero de establecimientos

- Argentina
- Europea
- Comida rápida
- Vegetariana, vegana, etc
- Pizzería
- Parrilla
- Asiática
- Latinoamericana
- Kosher o halal
- Otras comidas

Source: Buenos Aires Tourism Board based on gastronomy online platforms
Healthy food and the asado are the best qualified food types with the highest number of comments per establishment in Buenos Aires.

Although the number of establishments is low, the type of religious food (Kosher or Halal) is the best rated by TripAdvisor users, showing that they respond well to the needs of the niche.

Source: Buenos Aires Tourism Board based on gastronomy online platforms. Jan 2012 to Apr 2018
Palermo is the most commented neighborhood (38% of total comments). The staff and the service are the most negative points. The couples (41%) are the ones who commented the most and they did it about Argentine and healthy food in similar proportions.

Retiro is the best qualified neighborhood and is characterized by the comments of business travelers, who talk about food (healthy and Argentine) and location.

In Puerto Madero the comments are mostly from families and they talk about Argentine food and grill.

San Telmo is the 3rd neighborhood with the most comments. 33% were from travelers in a group of friends who rated European food in a high proportion.

Source: Buenos Aires Tourism Board based on gastronomy online platforms
¿What do consumers talk about when they comment?

48% of the guests spoke about their general experience in the establishments and 20% of the English speakers (11% of the total comments are in this language) talked about the food category.

- **Most frequent words in the Restaurant category.**
  - Years 2012-2018.
- **Most frequent English words in the food category.**
  - Years 2012-2018.

10% of the comments were negative.
- Frequent words in positive comments: food, attention, environment.
- Negative words: food, tables.

9% of the comments in English were negative.
- Frequent words in positive comments: delicious, food.
- The references to Argentine foods stand out: meat, pizza, empanadas, beef.

Source: Buenos Aires Tourism Board based on gastronomy online platforms
The popular grills “parrillas” and heritage pizzerias are distributed in more neighborhoods of the City in comparison with the rest of the establishments of interest.

Source: Buenos Aires Tourism Board based on gastronomy online platforms
Tourist mobility
Tourists mobility in Buenos Aires

- Volume of national and international tourists in different neighborhoods of Buenos Aires.
- Attraction areas.
- Sociodemographic profiles by neighborhoods.
- Impact of cultural, sport and gastronomy events.
- Estimate the economic potential of an area.
- Analyze the tourism flows at specific moments of the day and year.
¿How do travelers move around the different neighborhoods of the City?

Busiest schedules for Brazilian tourists, according to tourist area. Second semester 2017.

Plaza Serrano
20pm to 01am and Saturdays from 14pm to 17pm

Peatonal Florida/Colón
17pm to 21pm

Plaza de Mayo
11am to 14pm

Puerto Madero
13pm to 16pm and 20pm to 24pm

Caminito
11am to 14pm, with peak at 12am

Source: Buenos Aires Tourism Board based on Telefonica Argentina
Neighborhoods: San Telmo

Map of San Telmo Neighborhood based on mobile phones coverage cells.

FAIR OF SAN TELMO

SAN TELMO MARKET

PLAZA DORREGO

SAN TELMO MARKET

Source: Buenos Aires Tourism Board based on Telefonica and Openstreetmap
Sundays are the busiest days for tourists thanks to the San Telmo Fair, being the main attraction of the area.
San Telmo Fair

This street Fair promotes the presence of 19,300 people in the San Telmo area during the peak hours of 5:00 pm, which coincides with the closing of the Fair.

VOLUME OF PEOPLE ON SUNDAYS IN THE NEIGHBORHOOD OF SAN TELMO. 2017.

Source: Buenos Aires Tourism Board based on Telefonica Argentina

Sitio web: www.buenosaires123.com.ar

“The busiest time at the San Telmo fair is after 2:00 p.m. If possible, it is recommended to visit it in the morning as it is less crowded.”

Sitio web: www.buenosaires.travel

“The fair only opens on Sundays, but it works from morning to afternoon and the peak time is after noon.”

Web page: www.feriadesantelmo.com

“Another classification, more emphatic, divides the visitors between ‘buyers’ and ‘curious’. The first ones usually know what they are looking for: they visit the Fair in the morning or in the afternoon after comparing prices and evaluating the purchase. In the middle, the curious walk around during the morning and afternoon, although, at noon, they stop for lunch and move to some of the many restaurants nearby. After 16, the locals arrive and it is said that they ask a lot, but buy little.”
The cultural event Asado Championship increased the flow of people through the area of 9 de Julio Avenue between 30 thousand and 40 thousand people during the peak hour of the event (14 pm) in its two editions.
At the peak of the event (19 pm) we estimate that 25 thousand people participated in the parade (of a total of 103 thousand that were in the area). Of the people present in the area, 54% were residents of the City, 39% residents of the GBA and 7% tourists (national and international).

Source: Buenos Aires Tourism Board based on Telefonica Argentina
Final of the Polo Open: impact on national tourism

**NATIONAL TOURISTS, BY HOURLY SCHEDULE ON SATURDAYS OF DECEMBER 2017. ARGENTINE POLO FIELD AREA (PALERMO).**

**Final of the Argentine Polo Open Championship**

2,223
National Tourists

<table>
<thead>
<tr>
<th>PROFILE OF DOMESTIC TOURISTS AT 5:00 P.M.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Province</strong></td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Gender</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Age</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Source: Buenos Aires Tourism Board based on Telefonica Argentina
INTERNATIONAL TOURISTS, BY HOURLY SCHEDULE ON SATURDAYS OF DECEMBER 2017.
ARGENTINE POLO FIELD AREA (PALERMO).

Final of the Argentine Polo Championship

250
International Tourists

Tourists

0 50 100 150 200 250 300
0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23
Hour of the day

Source: Buenos Aires Tourism Board based on Telefonica Argentina
Sport and musical Events

Tourists by time range on Saturdays of September 2017. Vélez Stadium area.

- **National Tourists**
  - Domestic tourists
    - 02-sep-17
    - 09-sep-17
    - 16-sep-17
  - International tourists
    - 02-sep-17
    - 09-sep-17
    - 16-sep-17

- **International Tourists**
  - Domestic tourists
    - 02-sep-17
    - 09-sep-17
    - 16-sep-17
  - International tourists
    - 02-sep-17
    - 09-sep-17
    - 16-sep-17

- **Events**
  - Bon Jovi Show
  - Rugby Championship Argentina vs. All Blacks

Source: Buenos Aires Tourism Board based on Telefonica Argentina
Work in progress: attractions of the City

Main objectives:

- Know more than 780 attractions in the City on TripAdvisor.
- Understand their distribution in the territory.
- Analyze the perception and assessment of visitors.
- Obtain sociodemographic profiles.
- Detect opportunities, strengths and weaknesses.

Results

- General reports, by theme and by neighborhood.
- Integration of different databases (Telefónica, IG, ETI).

Fuente: ENTUR en base a TripAdvisor y Telefónica.
Ranking of attractions, according to the number of comments

The 20 most commented attractions of the city are located in the areas with the highest concentration of foreign tourists.

Location of the most commented attractions of the City and number of foreign tourists on Sundays in July at 3 pm, in the area.

Fuente: ENTUR en base a Tripadvisor y Telefónica.
Perception of users about museums

MACBA is in the worst position with only 110 comments and 60% positive comments.

Very well qualified but little commented.

It is the most commented museum and it has the highest number of positive ratings, over the average (91%).

MACBA is in the worst position with only 110 comments and 60% positive comments.

Attractions with more comments than the average, but with negative content.

Fuente: ENTUR en base a TripAdvisor.
Buenos Aires Tourism Board

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