Tourism Observatory of the city of Buenos Aires

First Annual Progress Report
October 2020

1. Buenos Aires

1.1 The city

Located on the banks of the Rio de la Plata, in the centre-east of Argentina, the Autonomous City of Buenos Aires (CABA) is the capital of Argentina and the seat of the federal government (see Figure 1). With an estimated population of 2.9 million inhabitants (and 12.8 in the metropolitan area) and an area of around 202 km², the City of Buenos Aires is the largest urban conglomerate of Argentina and one of the most populated areas of South America. It is also among the 20 largest cities in the world.
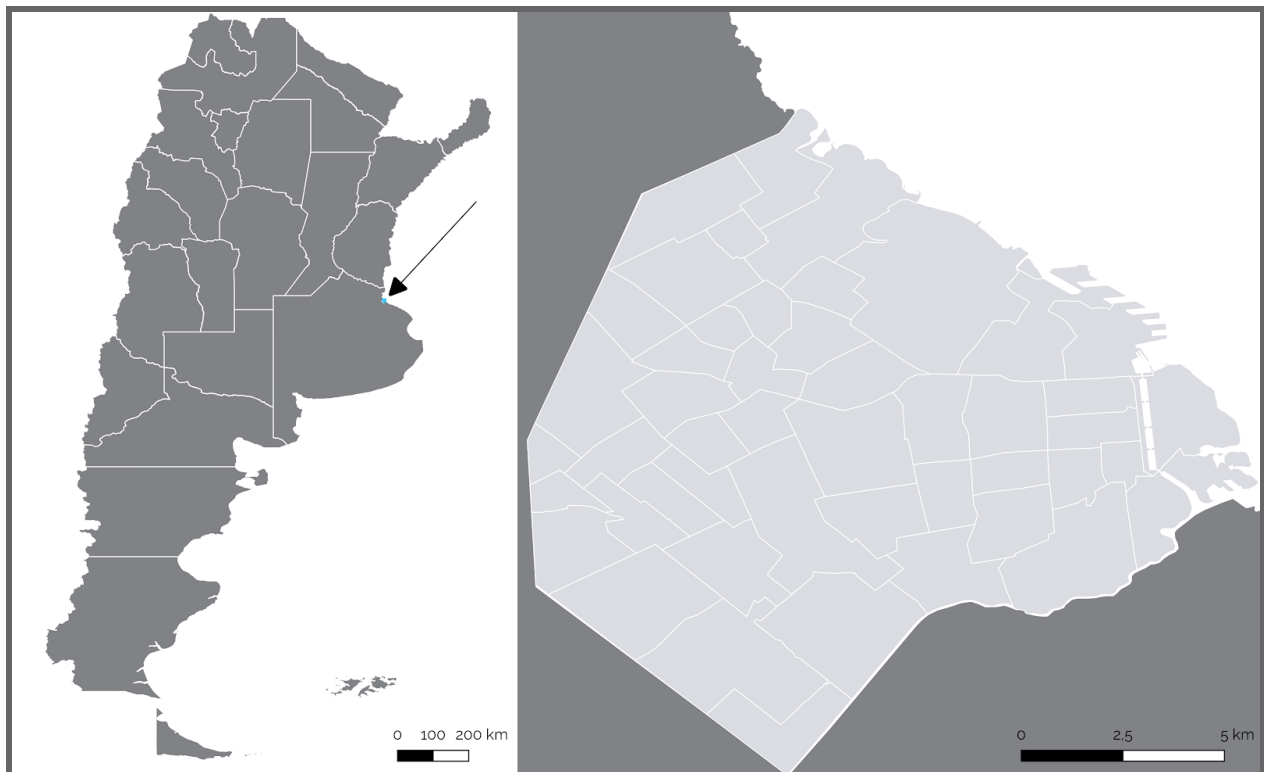
Figure 1. Argentina and the Autonomous City of Buenos Aires.

Buenos Aires also ranks among the cities with the highest quality of life in Latin America, and its per capita income (per capita GDP, USD 24,812) puts it in the top-three in the region. The City of Buenos Aires was founded in 1580 by the Spanish Juan de Garay, who called it City of the Holy Trinity. In the 19th century the Argentine state, with the aim of populating a large nation, promoted European immigration. Thus, the port of Buenos Aires was the arrival

point of the Spaniards, Italians, Lebanese Syrians, Poles and Russians who will define it as a cosmopolitan and dynamic city, rich in cultural diversity.

The city reveals traditions inherited from multiple cultures, and its diverse neighborhoods can be explored by foot with free guided tours. The combination of gastronomic and cultural offers is not to be missed in a city that does not sleep. In addition, its extensive parks and plazas, its coastlines and reserves make Buenos Aires an eco-friendly and healthy city.

With around ten million tourists per year, Buenos Aires is the most visited city in South America (ranking Euromonitor 2019 "The Top 100 city destinations,, one of the 25 best tourist destinations in the world and the most popular destination in South America (TripAdvisor 2016). It is also the Latin American city with the most award-winning restaurants (Latin America's 50 Best Restaurants 2015) and the best tourism destination in Central and South America (Conde Nast Traveler 2013).

1.2 Sustainable Development Goals 2030 in Buenos Aires

The 2030 Agenda for Sustainable Development was approved by all Member States in the General Assembly of the United Nations in September 2015, with the main challenge of eradicating poverty in all its forms and "not leaving anyone behind". The Agenda has 17 Sustainable Development Goals (SDGs) that, in turn, contain 169 goals and 231 indicators. The Agenda covers social, environmental and economic dimensions and aims to be transversal to plans, policies and areas of action. It is expected that the governments that adopt this commitment can propose local indicators to follow up on the fulfillment of the goals and the progress made in terms of development.

From the cities we can approach the objectives in a pragmatic way and contribute with local actions to the fulfillment of the proposed goals. At the same time, the SDGs provide a framework for government planning and for an inclusive development strategy. In the City, the first stage of the 2030 Agenda institutionalization was fulfilled by signing the Cooperation Agreement between the National Council for the Cooperation of Social Policies (CNCPS) and the Head of Government of the City of Buenos Aires (2016).

The General and International Relations Secretariat (SGyRI) of the City of Buenos Aires is responsible for coordinating the process of adapting the 2030 Agenda at the local level and convening the government and civil society organizations to participate in it. In addition, its function is to disseminate the SDGs at the local level, with the support of CNCPS and the United Nations. The result of the process is to determine the City's own goals, according to government priorities and the projects that contribute to the SDGs. In addition, the

necessary instruments to monitor this Agenda (definition of indicators, sources of information, baselines, and dates) must be defined in conjunction with other Government areas to achieve compliance with the intermediate and the 2030 goals. The final product of this joint effort will be published in a document called "SDG Localization Plan in the City of Buenos Aires", where the City's contributions to the 2030 Agenda, the prioritized SDG goals, its monitoring indicators and the commitments assumed for the intermediate and final goals will be listed.

In the City, work began on identifying the global and national indicators available to the City, based on the data published, the frequency of data collection and who produced it. It is important to adopt these indicators to ensure the comparability with the national and international contexts.

The first stage of the localization process consists of surveying the priority axes of government and their relationship with the goals defined in the 2030 Agenda. For this diagnosis it was necessary to analyze the plans, projects and initiatives of the City's Government Plan and map the areas responsible for them. The sources of information analyzed were the Strategic Goals that were defined for the Roadmap 2027 (2017) and the Government Commitments (2015-2018). Of the 169 goals proposed by the United Nations and the 78 defined by the CNCPS at the national level, 56 prioritized goals were identified for the City of Buenos Aires. The goals belong to 15 SDGs and they call on 27 City Government agencies.

The Buenos Aires Tourism Board works on the concretion of the Sustainable Development Goals that the Autonomous City of Buenos Aires has adhered to, particularly the following objectives:
- SDG 8: Promotes sustained, inclusive and sustainable economic growth and decent work for all through the strengthening and competitiveness of the sector.
- SDG 9: Promotes inclusivity and sustainability in the tourism sector through promotion of innovation models based on triple impact.
- SDG 11: Contribute to the transformation and positioning of the City of Buenos Aires as a smart and resilient tourist destination in the national and international market.
- SDG 12: Promotes models of responsible production and consumption as a strategy for innovation and competitiveness.

1.3 Tourism infrastructure & attractions

1.3.1 Air connectivity

A privileged location in South America connects Buenos Aires with the main cities of the region and the world. With two established international airports and one smaller airport only recently open to local and international commercial flights, receiving around 700 international flights per week in 2019, three hours from Rio de Janeiro and two from Santiago de Chile, Buenos Aires is a strategic center at regional and international level (see Figure 2).
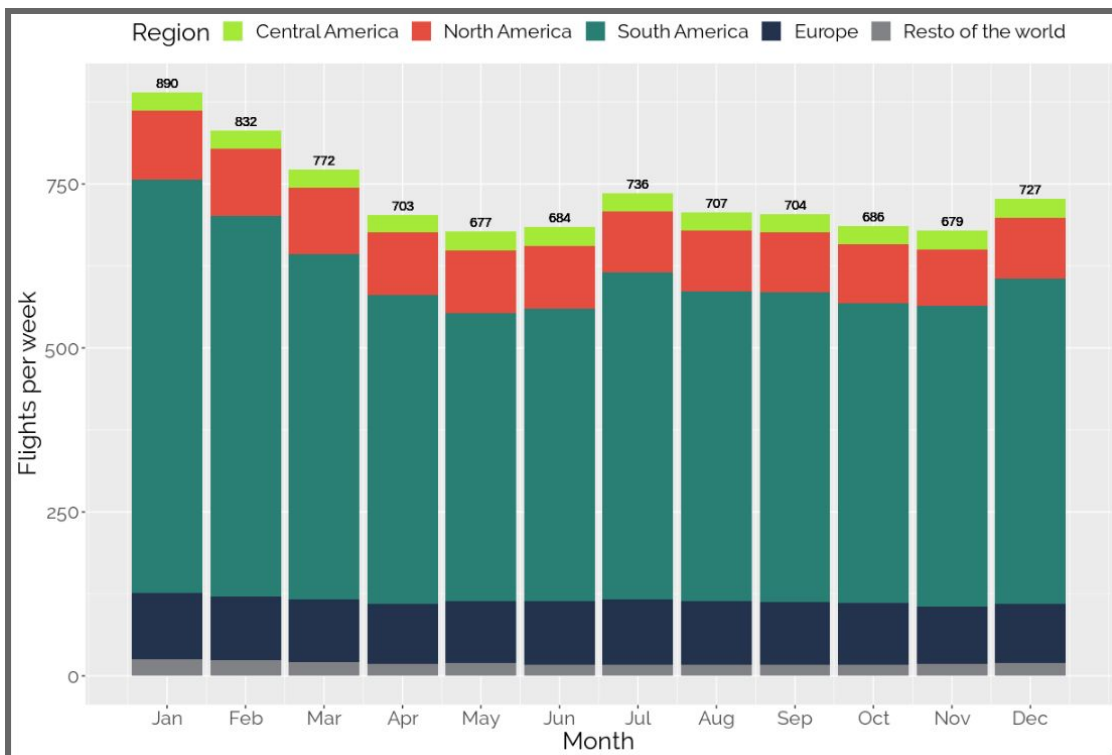
Figure 2 - Average international flights arrived at the Ezeiza, Jorge Newbery and Palomar airports per week from each region of the world, during 2019. Source: AA2000, own elaboration.

The city also had more than one thousand flights per week in 2019 that connected it with the rest of the country (see Figure 3).
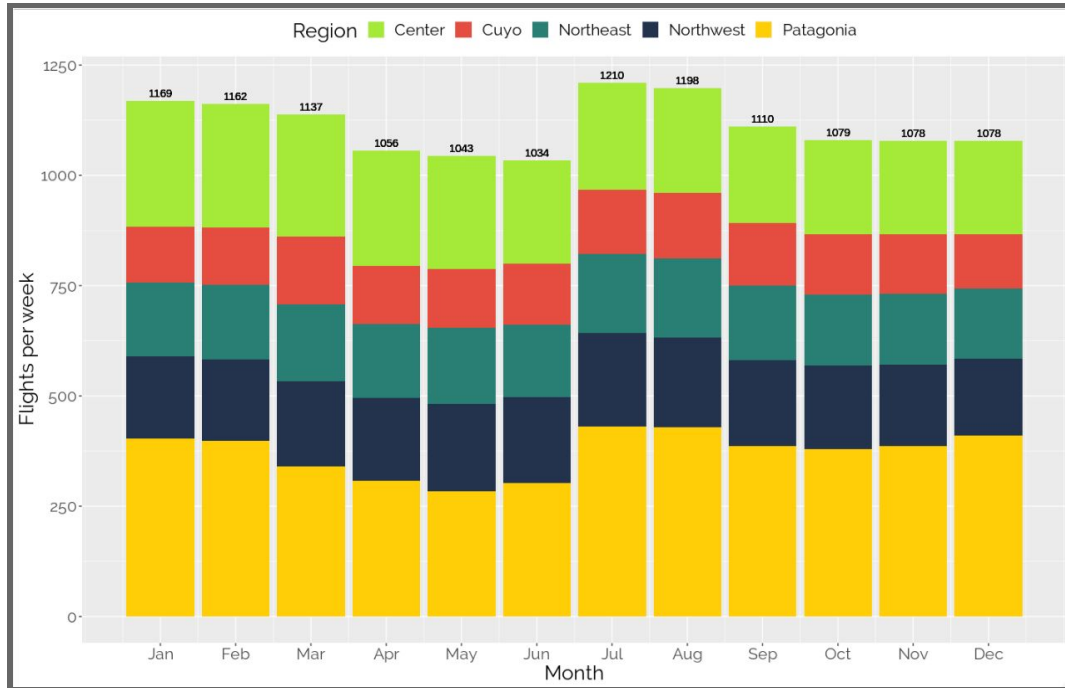
Figure 3 - Average national flights arrived at the Ezeiza, Jorge Newbery and Palomar airports per week from each region of the country, during 2019. Source: AA2000, own elaboration.

1.3.2 Tourism accommodations

As of December 2019, there were 547 hotels and other temporary accommodations in the city, 19.6% of which are high category (4 and 5 star hotels).

Hotels are mainly located in the tourism heavy areas of the city; especially those of high category (see Figure 4).
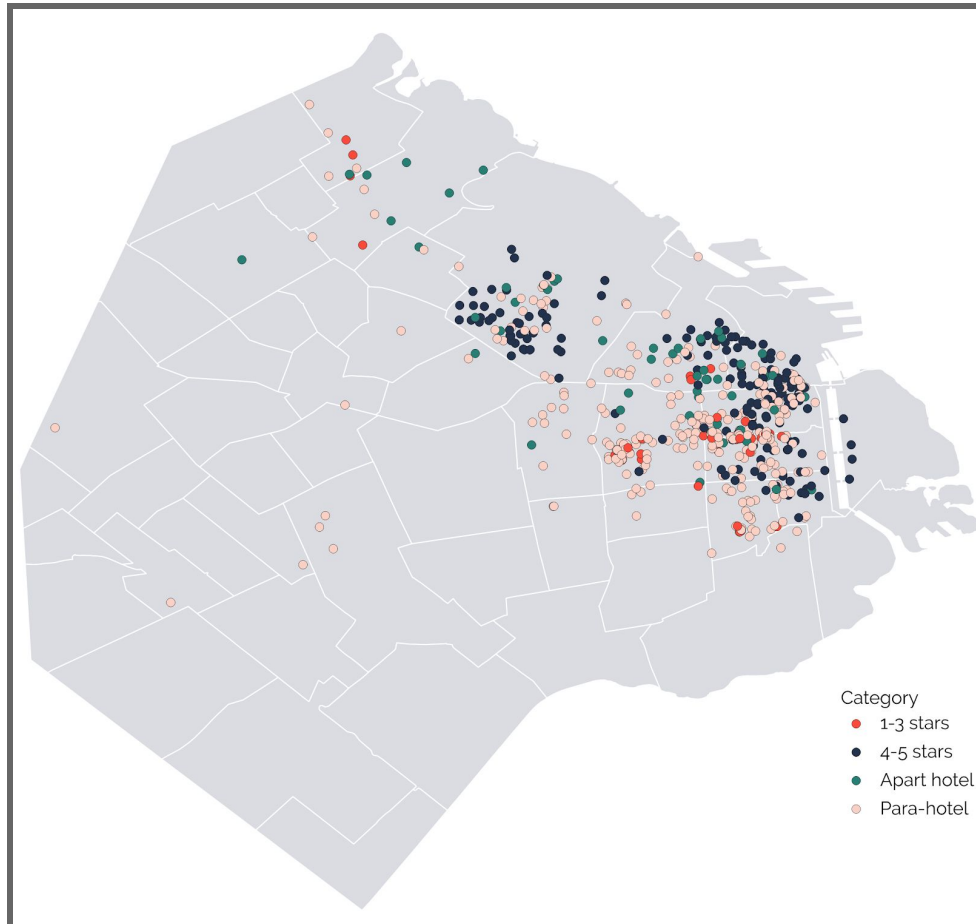
Figure 4 - Tourism accommodations surveyed in the Hotel Occupation Survey, by category. Source: Hotel Occupation Survey, own elaboration.

1.3.3 Gastronomy and cultural attractions

Buenos Aires city has numerous restaurants, more than 2.600 were found to have online presence in TripAdvisor. These restaurants are mainly located in the tourism heavy areas of the city (see Figure 5). Gastronomy in Buenos Aires is very diverse, there are restaurants that offer Asian, European and non-Argentinian Latin-American food, as well as some that offer Kosher and Halal food. There is a remarkable number of "parrillas", or restaurants that offer Argentinian-style barbecue (14% of the total number of restaurants).
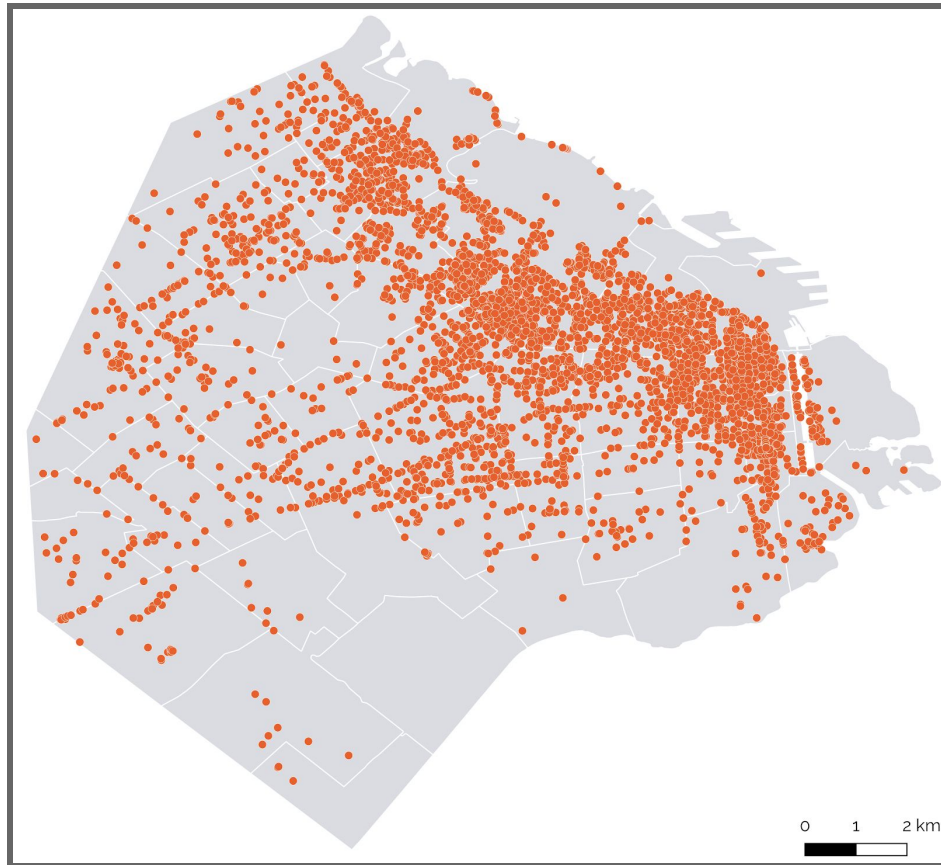
Figure 5 - Restaurants with online presence in TripAdvisor. Source: own data collection and elaboration.

On the other hand, the City of Buenos Aires stands out for having a very active cultural life. Most of the cultural activities are carried out through different agencies, establishments and events under the jurisdiction of the city government: libraries, museums, theatres, the cultural centers of Recoleta and General San Martín, Planetarium Galileo Galilei among others. Many cultural and gastronomic festivals are also organized by the Government of the City of Buenos Aires.

As of 2019, some of the cultural resources and attractions in Buenos Aires were:
I.   3 Thematic Parks (Tierra Santa, Museo de los niños, Ecoparque);
II.   150 Museums;
III.   5 Opera Houses (Teatro Colón, Teatro Avenida, Teatro Coliseo, Teatro Picadero, Teatro Ópera Alianz);
IV.   219 Theatres and auditoriums;
V.   216 Libraries;
VI.   More than 400 book stores; and

VII.   3 Consolidated Traditional Fairs (Feria de Mataderos, Feria de Antigüedades Mercado de San Telmo, Feria de Antigüedades Mercado de las Pulgas) apart from hundreds of trade fairs of social interest, of responsible consumption, artisans, and booksellers.
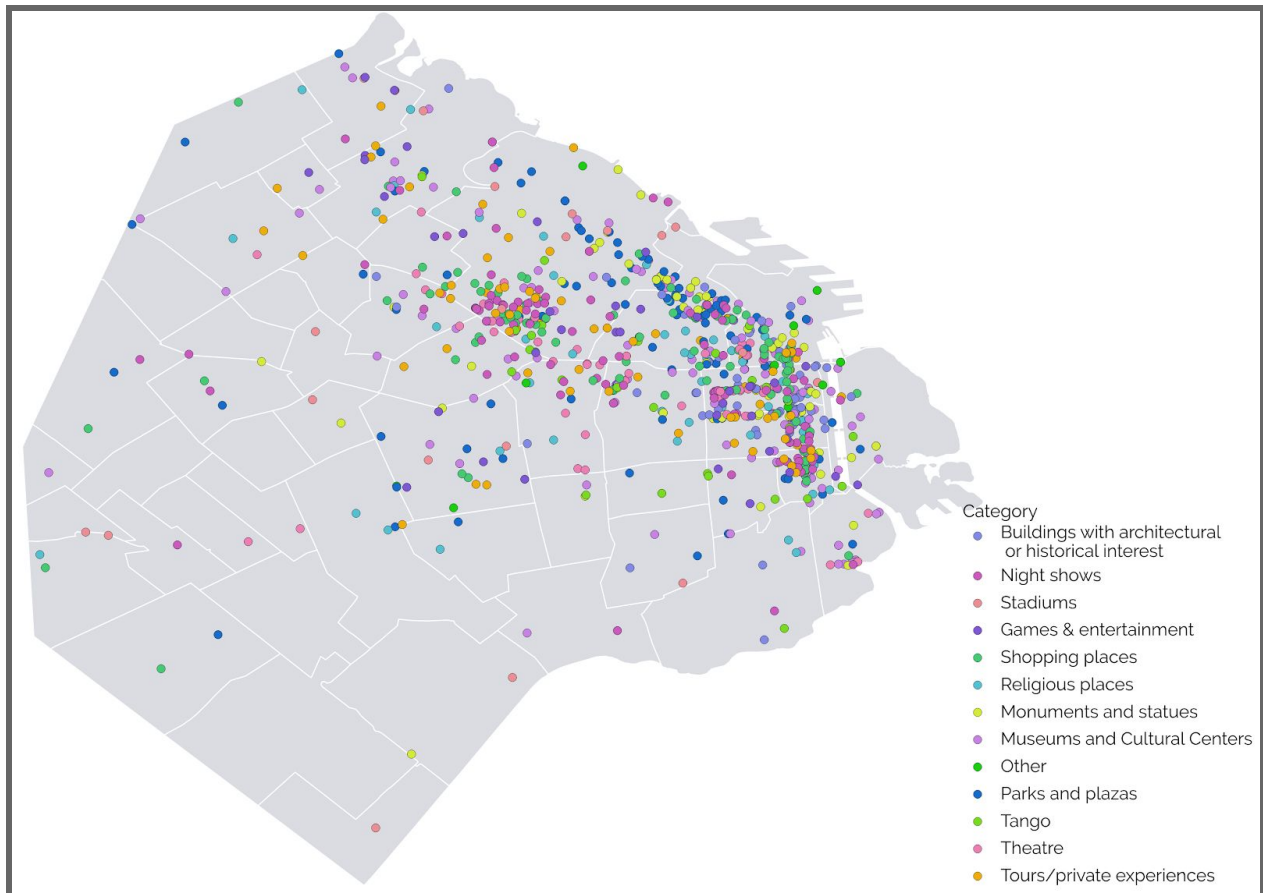
Figure 6 - Points of interest or tourist attractions with online presence in TripAdvisor. Source: own data collection and elaboration.

2.   Data governance in times of COVID-19 crisis

The city's government has been working hard to combat the pandemic evolution in different dimensions, notably in strengthening the health system for medical assistance.

Since the beginning of the COVID-19 outbreak, the City of Buenos Aires established a 360° communication strategy by developing wide public information campaigns. The authorities developed accurate public information campaigns regarding personal hygiene, COVID-19 information, social distancing, and care of the elderly.

Data governance was a central part of the first efforts to assess the situation of COVID-19, and the Tourism Observatory contributed to it by organizing the first calls to hotels to evaluate the number of visitors in the city. During this first stage, this team also created a dynamic dashboard including data of arrivals from repatriation flights, in order to contribute to organizing the isolation measures for local population in hotels. The city´s government data was pooled and is published for public use (https://www.buenosaires.gob.ar/coronavirus/datos).

During the crisis, the Observatory also maintained constant contact with other public institutions and private enterprises to share knowledge about new developments in the industry, and learn from the experience of destinations that have already started the reactivation process.

It is important to recall that the COVID-19 outbreak has resulted in a drop of -73% of tourists during the first eight months of the year, severely impacting on the economic income of the city by negative USD 1 billion.

In addition to the national schemes to support the recovery of the tourism industry, the city of Buenos Aires has decided to work closely with the tourism sector to develop accurate strategies once the mandatory isolation is over. In this regard, Buenos Aires is working with the World Travel and Tourism Council (WTTC) to obtain the Safe Travels seal which guarantees destinations have adopted global standardized safety and health protocols, marketing the city as a safe destination. This strategy aims to help the recovery as well as an adaptation of the industry to new challenges derived from the COVID-19 crisis.

The government also determined important strategies to help the tourism businesses fight the COVID-19 and adapt to the new normality. First, the government performed the amendment of the hotel sector promotion regime to provide low-interest rates for hotels and incentivize them to adapt their facilities according to new security protocols. Second, another relevant strategy undertaken by the City was the temporal cancelation of city taxes (ABL) for a limited number of months.

In addition to the economic measures, the Buenos Aires Tourism Board, in collaboration with public and private agents, developed the Tourist Reactivation Task Force, which is a comprehensive plan to reactivate tourism. Among the current main actions to keep the destination working are: (1) redefining markets and segments; (2) sharing stories of resilience; and (3) developing programs and actions. Moreover, this Task Force aims to keep the destination as a leading urban destination, which means that Buenos Aires is the top destination in LATAM to live and work, study, and do business, and it is also among the three safest urban tourist destinations in the region.

The phases and actions for the recovery plan are explained as follows:

- **Phase 1: National objectives**
    - Place Buenos Aires within the top 5 cities for domestic getaways.
    - Focus on three major segments: family and friends; leisure (millennials); and LGBT community.
    - Work with three main geographical groups according to the evaluation of sentiments and proximity.
- **Phase 2: Reopening**
    - Creation of a Federal Tourism Board for the exchange of good practices post-COVID-19.
    - Dissemination of hygiene and safety protocols.
    - Cross-promotion agreements with major markets in coordination with private sectors.
    - Agreements to promote national MICE tourism.
    - Press trips with opinion leaders and travel influencers all over the country to showcase safe tours.
- **Phase 3: Normalization**
    - Reopening of the main attractions (i.e. Hop-On-Hop-Off Tourist Bus, the Colon Theater, the Planetarium).
    - Presentation of Safe Tourist Circuits.
    - Communication and press actions for the arrival of the first tourists to the city.
    - Promotional strategy for national tourists (raffle tickets for the tourist bus, theaters tickets, airline, and restaurant discounts).
    - Updated statistical reports on the evolution of domestic tourism.
- **Phase 4: International objectives**
    - Maintain pre-existing awareness and positioning of the city in the minds of travelers and the tourist industry in strategic markets.
    - Be among the first 3 safe urban destinations approved by the WTTC in the region.
    - Position BA as a safe and resilient city prepared to receive "new tourists" based on good practices and international safety certifications.
    - Develop Visit BA with the private sector to promote international tourism through commercial activities and communications campaigns.

3. Buenos Aires Tourism Observatory

The destination management organization (DMO) is the Buenos Aires Tourism Board – BATB- (Ente de Turismo de Buenos Aires), an autonomous public body under the scope of the General Secretariat and International Relations of the city.

The main objective of the BATB is to design and implement policies and programs for the development and promotion of tourism as a strategic economic activity of the city.

The Tourism Observatory of the city of Buenos Aires was originally established in 2009 with the main purpose for collecting and analyzing information for the tourism sector. Our vision is to generate strategic knowledge for a data-driven approach applying innovative research techniques to foster sustainable development of tourism.

Nowadays, in order to achieve the objective established by the DMO to foster the economic impact of tourism in the city, the Tourism Observatory undertake several projects under 3 main areas of work:

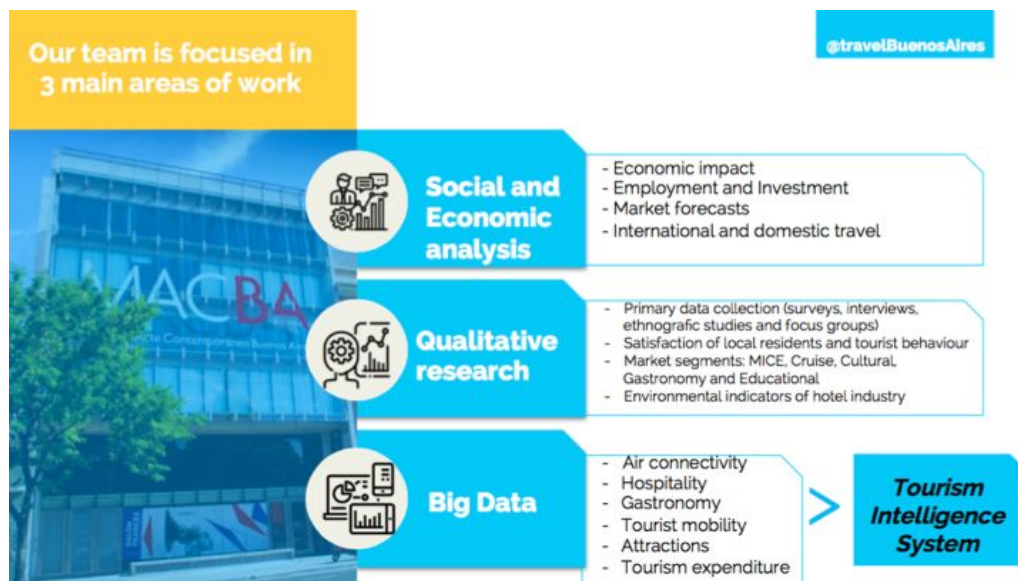1. Economic analysis

2. Qualitative research

3. Big Data

Figure 7 - The Buenos Aires Tourism Observatory areas of work.

Since November 2017, the Director of the Tourism Observatory of Buenos Aires city is Mr. Federico Esper (fesper@buenosaires.gob.ar), daily supported by a great group of professionals who are supervised by Mr. Federico Zerba (Manager of Big Data and Social and Economic analysis - fzerba@buenosaires.gob.ar) as well as Mrs. Silvina Di Giano (Manager of Qualitative Research - silvinadigiano@buenosaires.gob.ar). It is also important to recall that this First Annual Progress Report was drafted by Ms. Helen Braunstein, Senior Analyst of the Observatory,

Moreover, from the Observatory we have developed a 360-degree data-driven approach as detailed below:
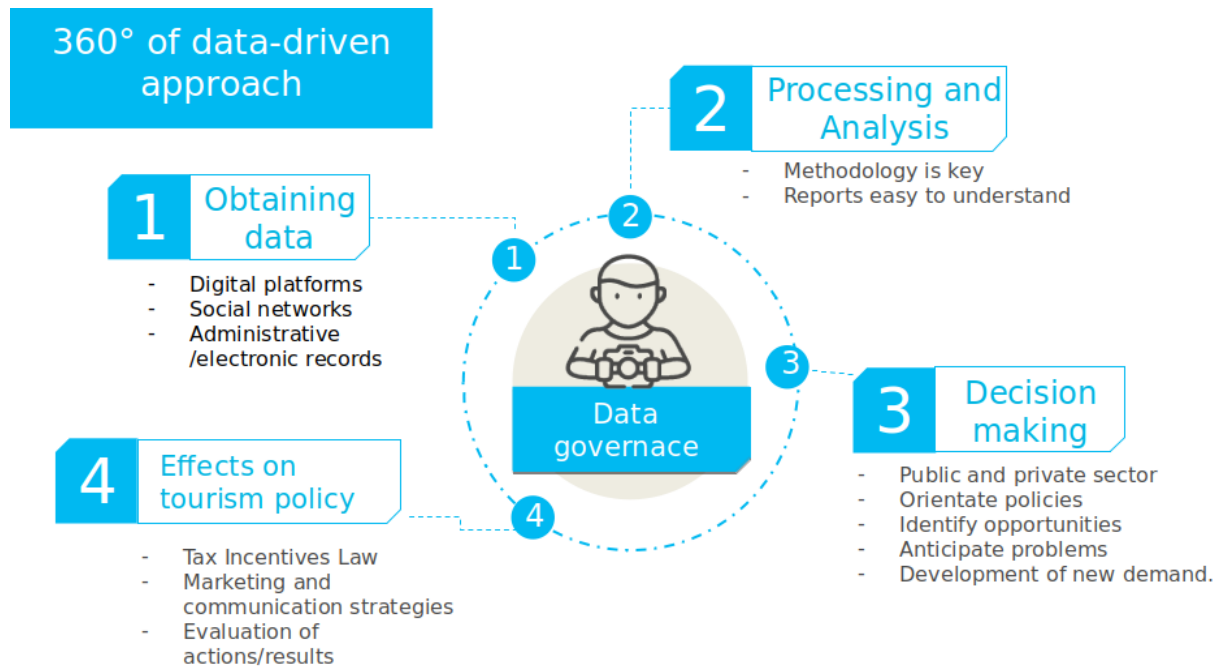

360° of data-driven approach

1 Obtaining data
- Digital platforms
- Social networks
- Administrative /electronic records

2 Processing and Analysis
- Methodology is key
- Reports easy to understand

3 Decision making
- Public and private sector
- Orientate policies
- Identify opportunities
- Anticipate problems
- Development of new demand.

4 Effects on tourism policy
- Tax Incentives Law
- Marketing and communication strategies
- Evaluation of actions/results

Data governace

Figure 8 - The Buenos Aires Tourism Observatory360° of data-driven approach.

Finally, is it important to underline that the Tourism Observatory gathers data as a contribution for 2 international rankings at local level:
- ICCA ranking (International Congress and Conventions Association): addressed to MICE segment, it covers information on the number of international ICCA events celebrated in every city worldwide. From the Observatory in cooperation with the Buenos Aires Convention Bureau we collect key information of these events held in the city in order to provide that information to ICCA.
- Ranking Euromonitor Top 100 most visited destinations: We provide Euromonitor with key data on international tourism arrivals at Buenos Aires city, in order to place our destination among other cities worldwide.

4. Buenos Aires Tourism Intelligence System

The Tourism Observatory launched a Tourism Intelligence System last year (see Figure 9), which makes available a huge amount of information in a simple way, including dynamic graphs and interactive maps. It impacts positively on the local community by granting free access to this information, allowing all tourism stakeholders to implement projects that maximize the benefits of their activities in a sustainable way, encompassing economic, socio-cultural and environmental dimensions.
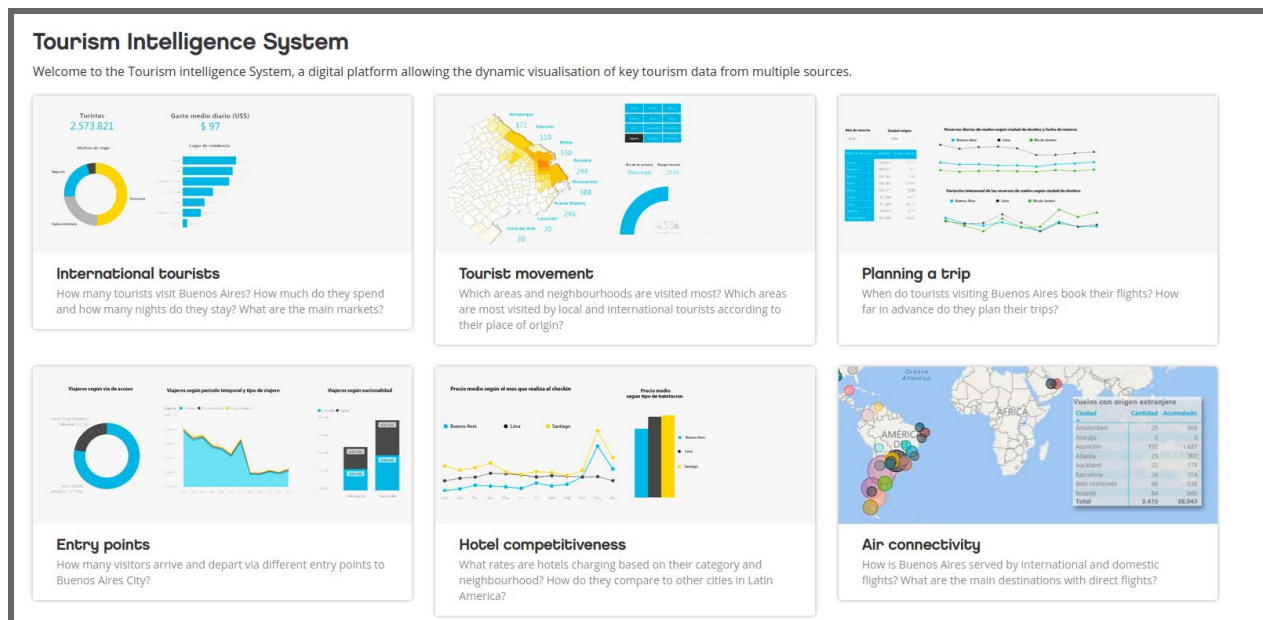

Figure 9 - Buenos Aires Tourism Intelligence System.

The Tourism Intelligence System allows us to understand Buenos Aires' position compared to other competitors in the region, to anticipate the main trends for forthcoming months, to understand the behavior of different segments of tourists who visit the city and to recognize the movement of visitors across the different neighborhoods and tourism attractions. At the same time, it allows us to evaluate the competitiveness of our hotels and gastronomy establishments and to strengthen product development strategies. This project includes more than 1 billion records by integrating many sources of information through collaboration with other organizations, both public and private, such as: the National Tourism Secretariat (former Ministry of Tourism of Argentina),, Amadeus, Smart City Undersecretary (Buenos Aires Government), Telefónica Argentina, Aeropuertos Argentina 2000, and the National Department of Migration, among others.

This online platform is available at: https://turismo.buenosaires.gob.ar/es/observatorio.

5. Innovation with Big Data

The Observatory has developed several new indicators using big data techniques, as an innovative approach based on new technologies for tourism research and market intelligence:

- Foreign and national people through immigration checkpoints registered by the National Directorate of Immigration on entry and exit.
- Number of national phones and foreign phones on roaming connected from different points of the city. This allows it to estimate tourism flow and concentration for both national and foreign visitors in the city (provided by Telefonica de Argentina).
- Number of credit and debit national and foreign card transactions and transaction amounts in different areas of the city (provided by Prisma Medios de Pago SA). This allows us to estimate part of tourism expenses and characterize it.
- Searches and reservations done using the Amadeus system from a number of cities around the world to Buenos Aires' airports.
- Hotel rooms prices (published online), and hotel room availability, as well as public comments and ratings on online offered hotels.
- Gastronomy establishments offered online, the public's categorization and ratings, as well as their comments on them.
- City attractions with online presence in online travel platforms, the public's categorization and ratings, as well as their comments on them.
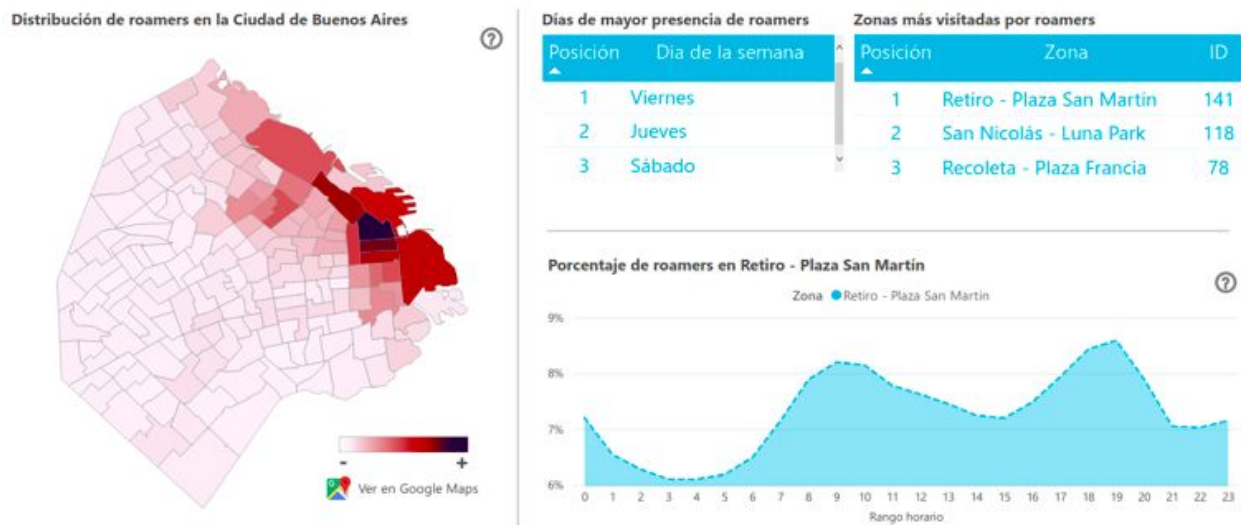

Figure 10 - International tourism presence in the city per city area and hour, as well as main week days.
Taken from the Tourism Intelligence System website:
https://turismo.buenosaires.gob.ar/en/observatorio/movilidad-turistica
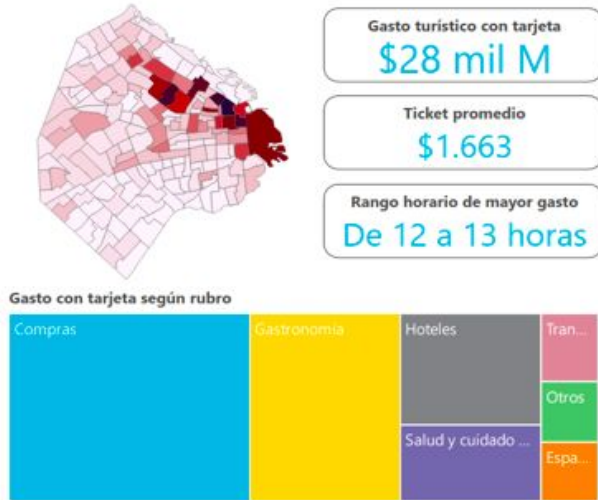
Figure 11 - International and national tourism expenditure through credit and debit cards in the city per city area, average ticket and type of expense. Taken from an upcoming section of the Tourism Intelligence System website, not yet public.

6.   Sustainability Performance Indicators

Table 1. Indicators in this report.

ISSUE AREA	DESCRIPTION	Status
Seasonality	International travelers arrivals through local ports of entry by month and market (volume and % of annual arrivals)	Available
	National travelers staying in tourist accommodations by month (volume and % of annual arrivals)	Available
Employment	Number of formal employees in the accommodation and food service sector	Available
Economic benefits	International tourism expenditure in the city	Available
	National tourism expenditure in the city	Available
Governance	Number of sources of information from the private sector	Available
	Number of training workshops addressed to private sector with key trends	Available
Local and visitor satisfaction	Number of neighbourhoods included in local satisfaction research	Available
	Visitor satisfaction with city services	Available
Energy management	Measurements in progress.	
Water management		
Waste management		

7.   Tourism Seasonality

Seasonality in tourism is the tendency of travelers to be distributed unequally throughout the year. Measuring tourism seasonality is important, because this unequal distribution can have negative consequences, like instability of tourism industry employment or high impact on residents on high volume months. We evaluate tourism seasonality in international travelers arrivals and national travelers staying in tourism accommodations by looking at the volume per month, the relative frequency distribution of that volume, and calculating the gini index for seasonality.

7.1 International travelers arrivals through local ports of entry by month and origin market (volume and % of annual arrivals)

We estimate seasonality for international travelers using the Directorate of Migration database, and the date of entry of the visitors who stayed at least one night in the country. Buenos Aires international tourism isn't, a priori, hugely seasonal, probably because the city has many attractions through the seasons, and different points of interest for the different origin markets. In particular, seasonality is more marked in origin markets far from the country, and less so in the regional origin markets. See Table 2, where we detail the calculated gini index for seasonality (an index closer to 1 indicates a more marked seasonality), or Figure 11, where the more concave curves, farther from the straight line, point to more seasonal origin markets.

Furthermore, long haul markets tend to prefer the local summer months, while regional markets have a preference for winter, possibly also combining the city with other country destinations like the south.
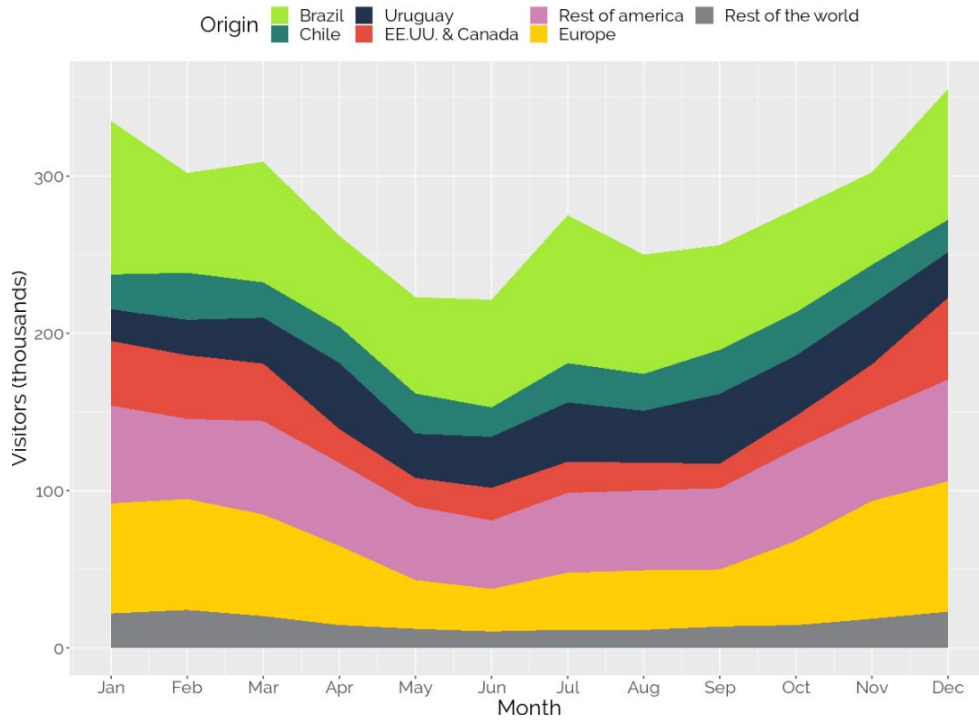
Figure 12 - International visitors that stay overnight in the country and enter the country through Buenos Aires ports of entry, by origin market and month. Source: National DIrectorate for Migration, own elaboration.
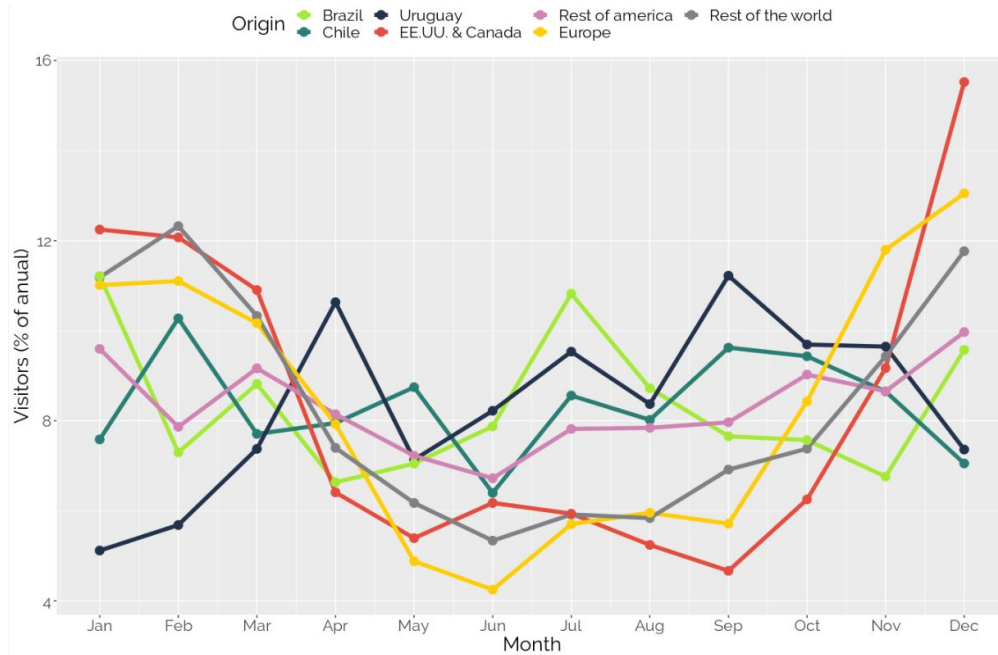

Figure 13 - Percentage of international visitors that enter the country per month. Source: National DIrectorate for Migration, own elaboration.
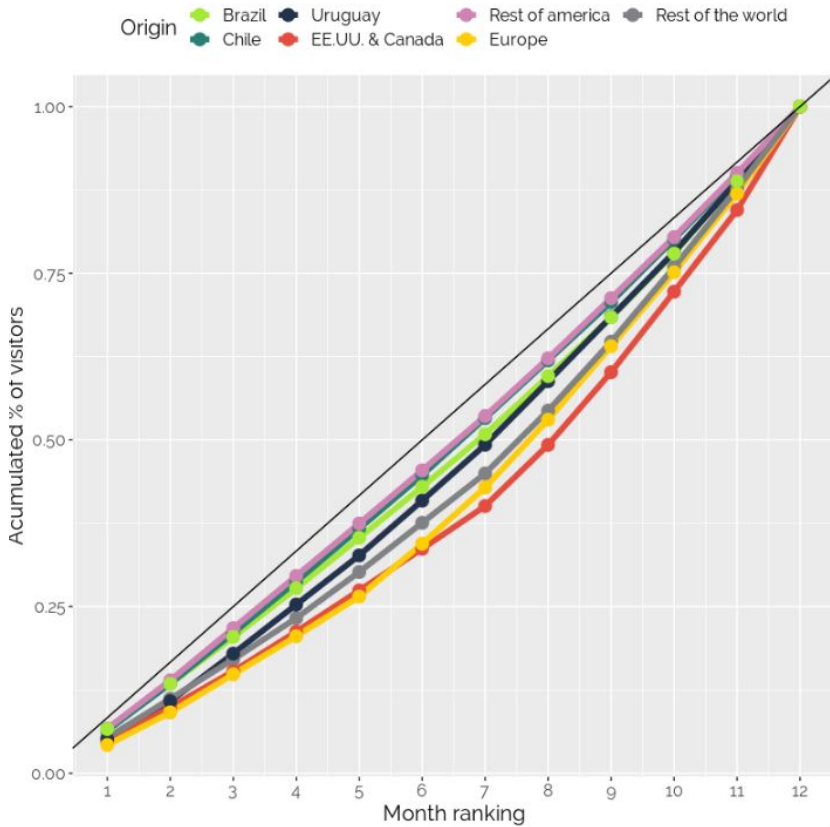
Figure 14 - Seasonality curve for the international visitors. Source: National DIrectorate for Migration, own elaboration.

Origin	Gini coefficient
Brazil	0.10
Chile	0.07
Uruguay	0.12
EE.UU. & Canada	0.22
Rest of america	0.06
Europe	0.20
Rest of the world	0.16

Table 2 - Seasonality gini index for each origin market. Source: National DIrectorate for Migration, own elaboration.

7.2 National travelers staying in tourist accommodations by month (volume and % of annual arrivals)

We estimate seasonality for national visitors in the city using the monthly Hotel Occupancy Survey, which provides the necessary granularity. The seasonality of nationals travelers who stay in tourist accommodations also isn't high, with a gini index of 0.062 and reaching the highest points in July, during the winter school vacations.
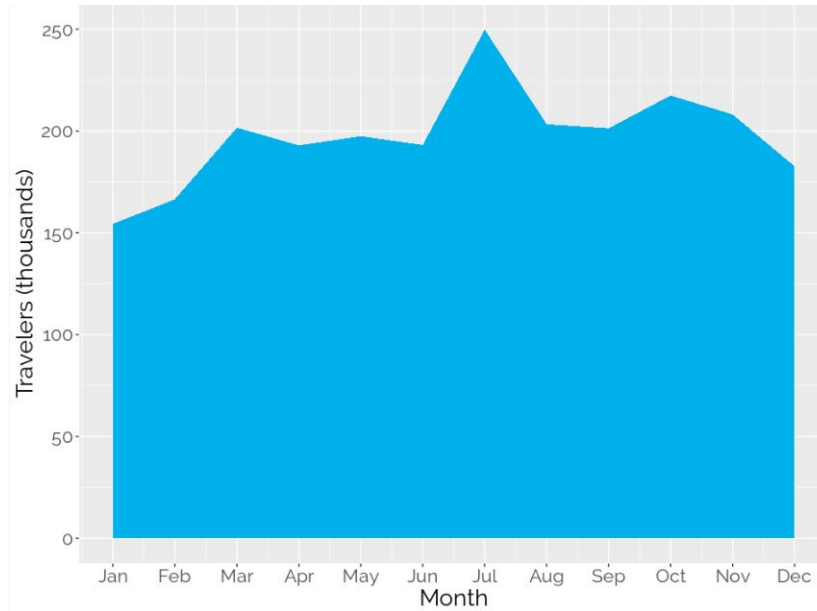
Figure 15 - National travelers that stay in any of the city's tourist accommodations, by month. Source: Hotel Occupancy Survey.
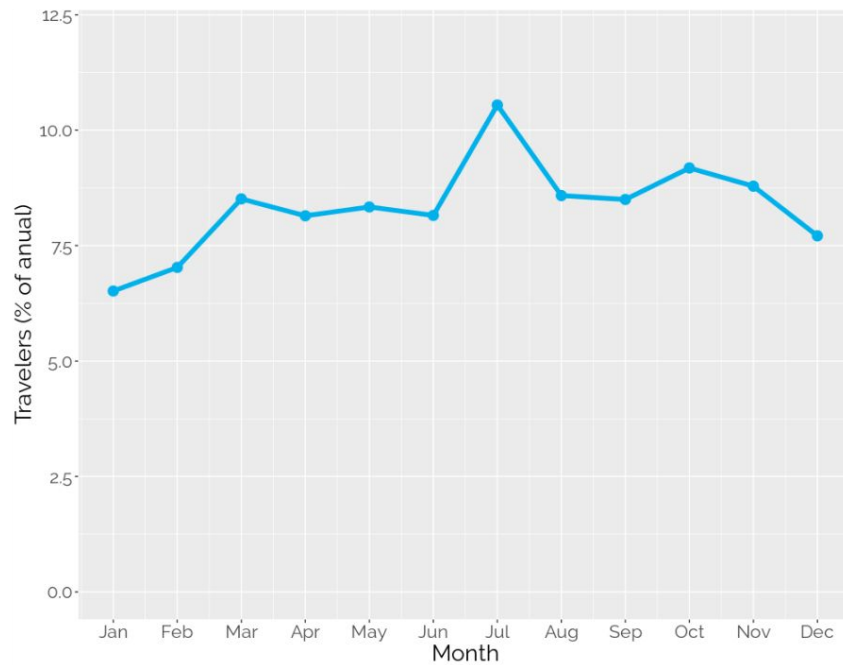
Figure 16 - Percentage of national travelers that stay in the city's tourist accommodations per month. Source: Hotel Occupancy Survey.

8. Employment

8.1 Number of formal employees in the accommodation and food service sectors

The number of formal, registered employees in the accommodations and food service sectors is around 80.1 thousand every year.

Sector ■ Accommodations ■ Food service

Figure 17 - Monthly average of formal, registered employees in the accommodations and food service sectors in the city, per year. Source: SIPA, own elaboration.

9. Destination Economic Benefits

9.1 International tourism expenditure in the city

Using the International Tourism Survey, and data from the National Directorate for Migration, we estimate international tourism expenditure to be US$1.839 Millions in 2019. Tourists consumption of goods and services in the city in 2019 rose 6,5%, although expenditure measured in US dollars was down by the same number.
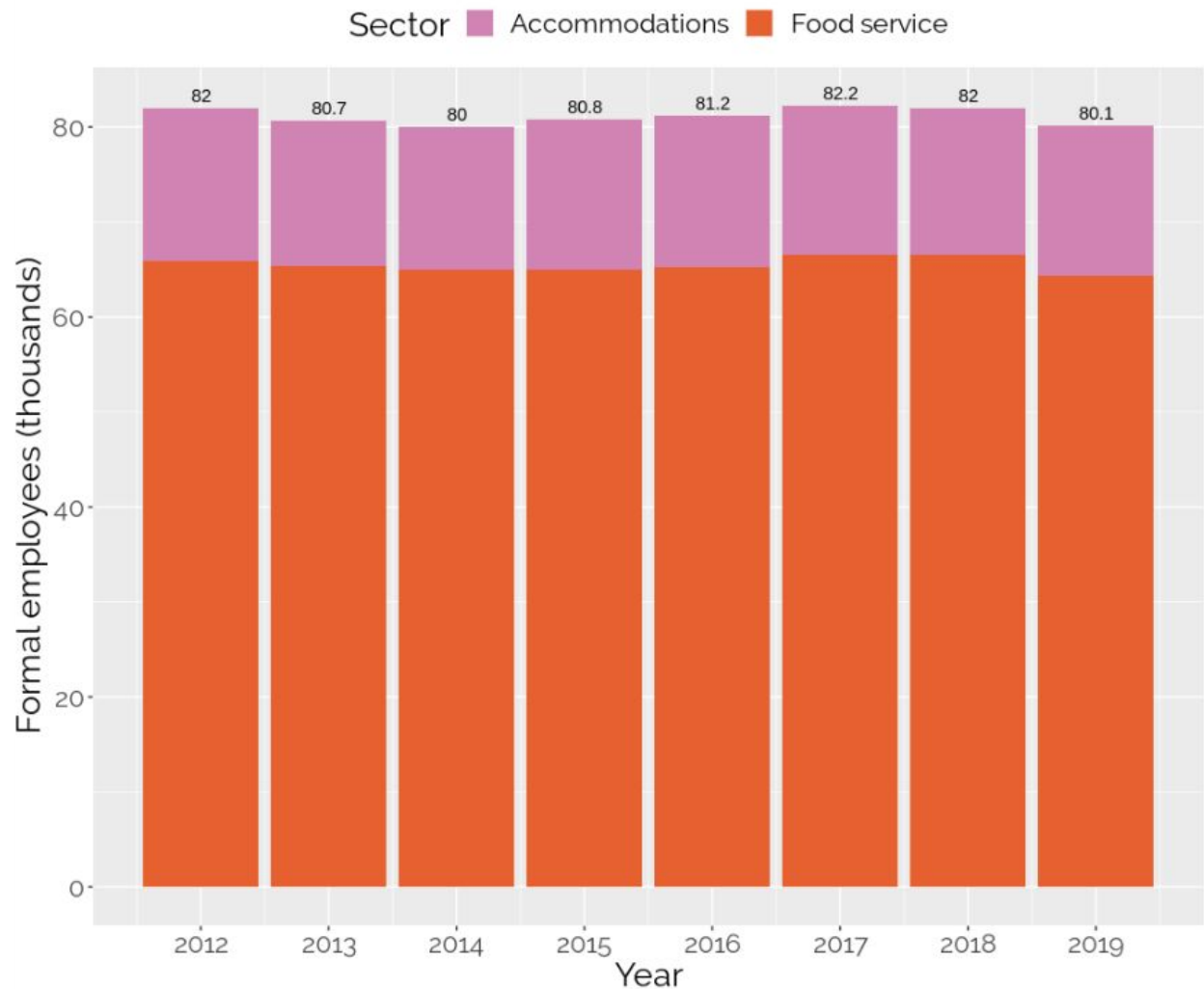
Gasto

US$	1.839 M (-6,5%)	**US$628** Promedio por viaje
AR$ (constantes de 2019)	88.336 M (+6,5%)	
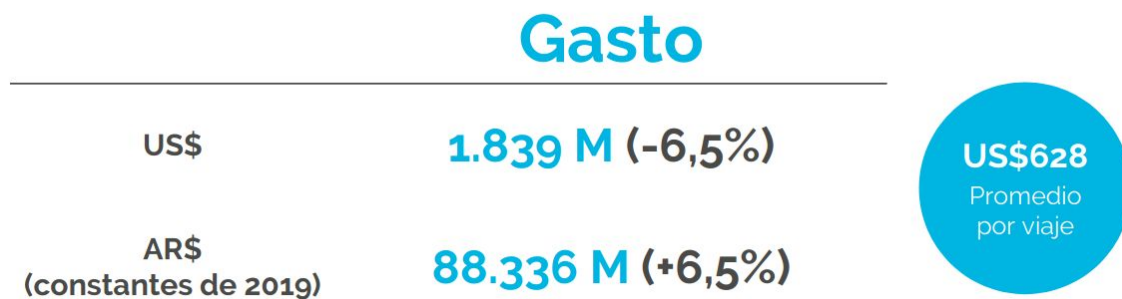
Figure 18 - 2019 international tourism expenditure in US$ and 2019 AR$.

9.2 National tourism expenditure in the city

Using the Hotel Occupancy Survey and the Travel and Tourism Home Survey, we estimate the National tourism expenditure in the city to have been around US$645 Millions during 2019,, explained by stays of around 3 nights and a per visit expenditure of around US$93.

Gasto total
US$ 645 millones

Gasto por viaje
US$ 93

Estadía media
3 noches

Figure 19 - 2019 national tourism expenditure in US$.

10. Governance

10.1 Number of sources of information from the private sector

Public-private cooperation is a key pillar of sustainable governance. One of our goals is to increase the number of sources of information, specially sources that are normally unavailable to government data driven decision making — that is, private sources of information.

Currently, the Observatory has 5 sources of information coming from the private sector:

- Telefónica Argentina, tourism mobility through mobile network
- Prisma SA, tourism expenditure through debit and credit cards
- Aeropuertos Argentina 2000, arrivals and departures in local airports
- Amadeus, travel searches and bookings through GDS
- TRP (Terminales Río de La Plata - DP World Buenos Aires), movement of cruise ships and passengers at the Quinquela Martín Terminal.

10.2 Number of training workshops addressed to private sector with key trends

The Observatory undertook the organization of several workshops addressed to chambers and tourism associations, entrepreneurs, hoteliers, tour operators, academic institutions and other stakeholders in order to share knowledge, key trends for the industry and the use of our Tourism Intelligence System in order to improve decision-making and competitiveness. It is very important for us to share and disseminate the key trends to local stakeholders of the tourism activity, contributing to a data-driven approach and helping them to re-orientate their strategies and marketing actions in these uncertain times.

In this regard, we have conducted more than 20 workshops and webinars to different tourism and hotels associations, enterprises and companies, such as AVIABUE, Destino Argentina, Buenos Aires Convention & Visitors Bureau, AFEET-FIASEET (Asociación de ejecutivas de empresas turísticas), CAT (Cámara Argentina de Turismo), AHT (Asociación de Hoteles de Turismo), AHRCC (Asociación de hoteles, restaurantes, confiterías y cafés),

FEHGRA (Federación Empresaria Hotelera Gastronómica de la República Argentina), Despegar, Asociación Argentina de Polo, Global Blue, RIL (Red de Innovación Local), and local Tourism Boards of many destinations in Argentina such as Tierra del Fuego, Mar del Plata, Río Negro, Concordia, Salta Ciudad, Salta Provincia, Carlos Paz, among others.

11. Local Satisfaction

11.1 Number of neighbourhoods included in local satisfaction research

Since it is essential for the sustainable development of tourism in the city to understand the local residents´ perception of tourism's impact on the city in general and on their neighborhoods in particular, the Tourism Observatory is carrying a research project with residents of the main tourist neighborhoods in the city: San Telmo, La Boca, Recoleta, Palermo y Villa Crespo. The project also included research on neighborhoods with an incipient development of tourism, but was interrupted by the Covid-19 pandemic, so we have only included the Villa Crespo neighborhood, with the Chacarita and Colegiales neighborhoods still pending. Further research on neighborhoods with emerging tourism residents' perceptions about tourism as an activity and its impact on their neighbourhood is planned to continue as the current COVID19 outbreak normalizes.

The main goals of this research project are:
- To gain an in-depth understanding about the impact of tourism on the residents of the city.
- Collect the associated meanings and the acceptance of tourism as an activity in the neighborhood.
- Detect associations linked to the "tourist experience" (local - tourist encounter).

To carry out the aforementioned goals, 30 focus groups, 6 in-depth interviews, and 380 surveys were carried out in the 5 neighborhoods of the city mentioned above. These neighborhoods have a population of 531,500 inhabitants, 18% of the total population of the city.

The quantitative stage of the project was carried out in the San Telmo neighborhood, since it is one of the main tourist neighborhoods in the city, and where most of the attractions related to the historic center of Buenos Aires are located. To carry out this quantitative

research stage, we worked on a joint project with the University of San Martín (UNSAM), both in the design of the project, the instruments for collecting information, the field work and the analysis of results. Below there are some key findings of the study:
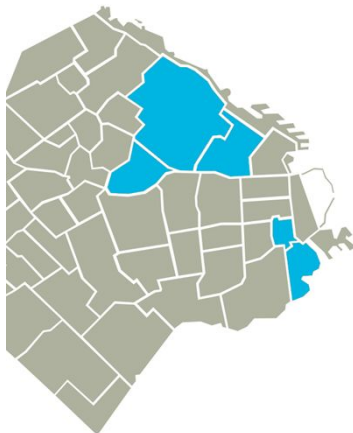

Figure 20 - Design of the study about residents' perception of tourism impact.

2 Percepción del turismo como actividad y su impacto en la ciudad

@travelBuenosAires

Predominan **connotaciones positivas** sobre el **turismo como actividad**, y su impacto en el país y la ciudad

Plano racional

- **Impacto económico:** divisas, trabajo, derrame
- Mantenimiento y **embellecimiento** del destino
- "Industria limpia"

Plano emocional

- **Intercambio cultural, enriquecimiento.**
- Orgullo
- **Descubrimiento del propio lugar** a partir de la mirada "del otro"
- "Ventana al mundo" **/ Vidriera** para mostrar el país al mundo

Puntualmente, emergen algunas desventajas : Incremento de precios, deterioro del medio ambiente, aglomeración

*"Creo en el Preámbulo, **uno se alimenta culturalmente del intercambio**...te ayuda a la diversidad, eso **también te ayuda a alimentar la ciudad"***

*"Es bueno para la economía, es un **impulso comercial** para una zona, región, **genera ingresos permanentes"***

*"**El atractivo** lo ves a **través de los ojos del otro"***

*"**Habla bien de la ciudad**, tiene inquietudes para gente que no vive ahí"*

*"**De alguna manera reconocido**, digo por BA, con esta ubicación del fin del mundo y **que llegue la gente hasta acá** quiere decir que es una ciudad hermosa"*

*"Un motivo para **mantener la ciudad más linda**, para embellecerla y cuidarla un poco más"*

Fuente: Dirección General de Inteligencia de Mercado y Observatorio – ENTUR

Figure 21 - Residents' opinions about tourism impact.

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¿Qué sucedería si no viniesen más turistas al barrio?

Palermo

*"Es tanta la afectación positiva que genera que para mi **sería un lugar de Capital sin ningún tipo de atractivo"***

*"Quedaría Palermo **triste**"*

*"**Menos cosmopolita"***

"Perdería la posibilidad de charlar con alguien del otro lado del mundo"

*"**Se termina el folklore**, le falta algo"*

Recoleta

*"Entramos en **guerra civil** o algo **muy grave estaría pasando** si no hubiera más turistas"*

*"**Nos sentiríamos vacíos**, no habría movimiento"*

*"Estaríamos **frustrados**"*

La Boca

*"**Nos iríamos a la B"***

*"Qué feo. Qué **triste**, se vuelve gris"*

*"Seria mucho más **peligroso**"*

"Perdería mucho"

"Como un vacío! Me muero de angustia".

*"Panorama **desolador**"*

"No me cambia nada"

San Telmo

*"**Pierde algo característico** del barrio, pierde prestigio, reconocimiento"*

*"Hace 15 años caminabas por Carlos Calvo había **casas tomadas**. Si el turismo se va, volvería eso"*

*"Quedaría **apagado, inseguro**"*

*"**Cerrarían** muchos bares y restaurantes"*

"Seria lo mismo, seguiría siendo San Telmo"

Villa Crespo

*"**No tanto cambio**, menos negocios en la zona de outlets"*
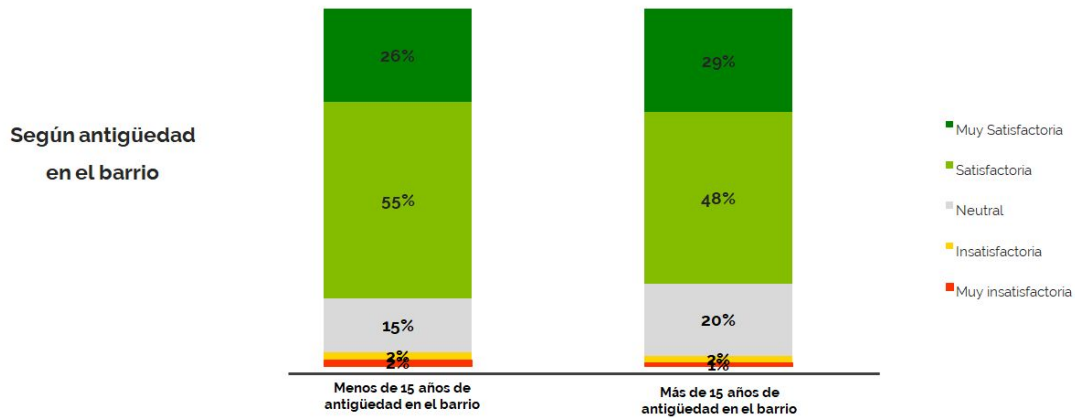
"Más tristes"

"Ni me va ni me viene"

"Yo lo conocí sin turistas"

Fuente: Dirección General de Inteligencia de Mercado y Observatorio – ENTUR

Figure 22 - *"What would happen if there were no more tourism in the neighborhood?"* according to residentes.

Nivel de satisfacción con el turismo en el barrio

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Según antigüedad en el barrio

- Muy Satisfactoria
- Satisfactoria
- Neutral
- Insatisfactoria
- Muy insatisfactoria

Menos de 15 años de antigüedad en el barrio: 26%, 55%, 15%, 2%, 2%

Más de 15 años de antigüedad en el barrio: 29%, 48%, 20%, 2%, 1%

No se evidencian diferencias significativas en la opinión según antigüedad en el barrio.

Fuente: CIDETUR UNSAM y DG de Inteligencia de Mercado y Observatorio ENTUR   11   Base: total muestra

Figure 23 - Residents' satisfaction with tourism according to time living in the neighbourhood.

Satisfacción con la interacción con turistas

@travelBuenosAires

¿Cómo es su experiencia al relacionarse con los turistas?

La experiencia del encuentro con los visitantes resulta satisfactoria para los vecinos del barrio

34%, 48%, 10%, 1%, 7%

- Muy satisfactoria
- Satisfactoria
- Neutral
- Insatisfactoria
- Muy insatisfactoria
- Ns/Nc
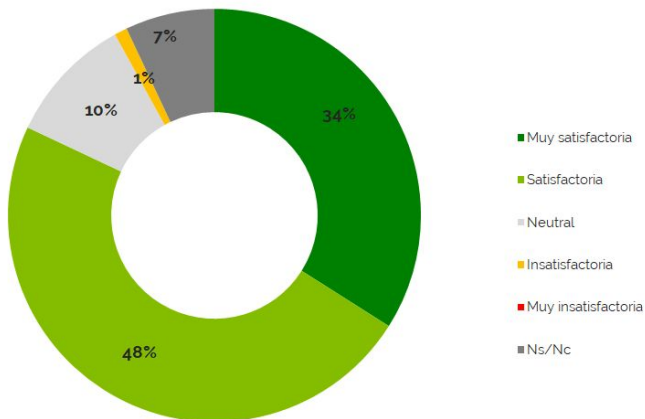
Fuente: CIDETUR UNSAM y DG de Inteligencia de Mercado y Observatorio ENTUR   15   Base: total muestra

Figure 24 - Residents' satisfaction with their interaction with tourists.

Impacto del turismo en el barrio

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Indique su opinión con respecto a las siguientes afirmaciones. "En mi barrio el turismo tienen los siguientes efectos":

Legend:
- Muy de acuerdo
- De acuerdo
- Neutral
- En desacuerdo
- Muy en desacuerdo
- Ns/Nc
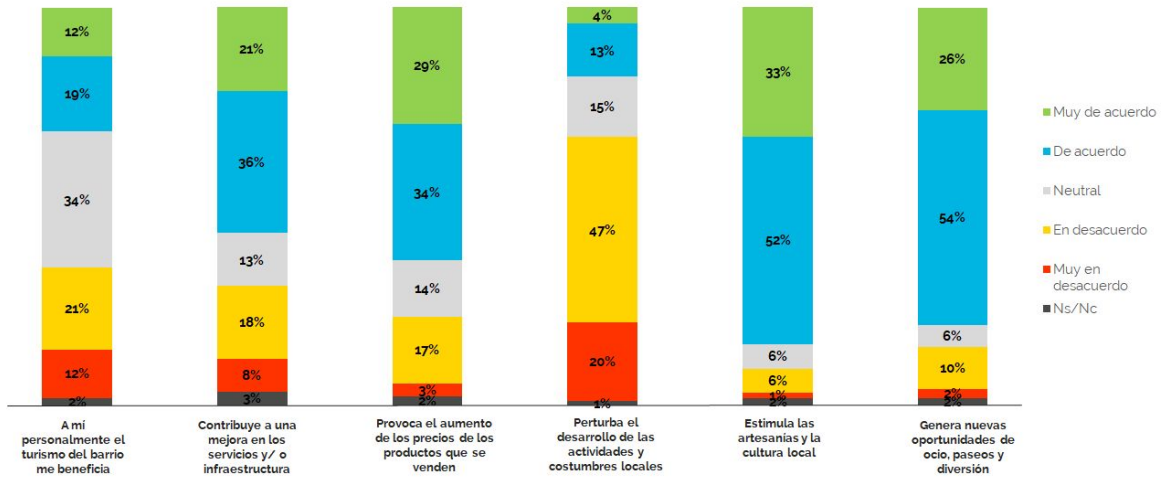
Fuente: CIDETUR UNSAM y DG de Inteligencia de Mercado y Observatorio ENTUR   18   Base: total muestra

Figure 25 - Residents' opinions about tourism impact in their neighbourhood.

Impacto del turismo en el barrio

@travelBuenosAires

Indique su opinión con respecto a las siguientes afirmaciones: "En mi barrio el turismo tiene los siguientes efectos"…

Legend:
- Muy de acuerdo
- De acuerdo
- Neutral
- En desacuerdo
- Muy en desacuerdo
- Ns/Nc
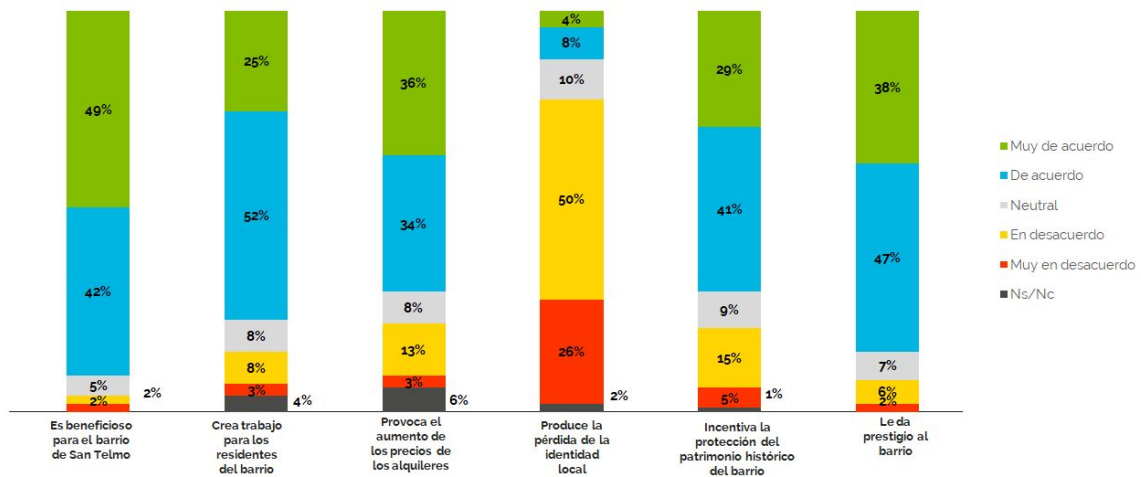
Fuente: CIDETUR UNSAM y DG de Inteligencia de Mercado y Observatorio ENTUR   19   Base: total muestra

Figure 26 - Residents' opinions about tourism impact in their neighbourhood.

11.2 Visitor satisfaction with city services

To estimate visitor satisfaction in city services, we use the International Tourism Survey. International visitors in general score city hygiene lower than other areas of service, with a greater proportion of tourists giving it the lower scores (1 and 2) and a lower proportion of tourists giving it the highest score (5).
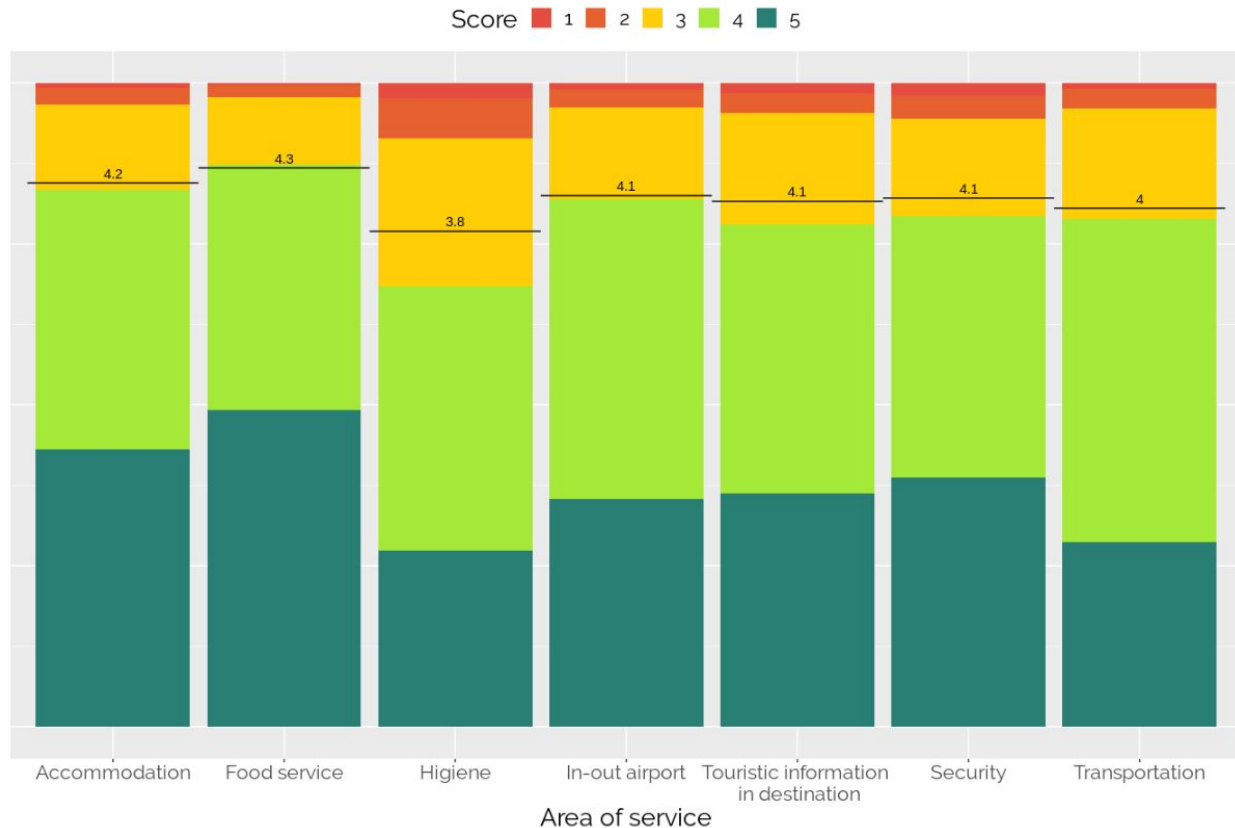
Figure 27 - Score given to the different areas of service in the International Tourism Survey by international tourists who only visited the city. Source: International Tourism Survey. INDEC - MINTUR.

In addition to this global indicator of visitor satisfaction cited above, we measure visitor satisfaction indicators by market segment, for example cruise ship tourists and tourists who participate in MICE events in the city. The survey is systematically carried out through personal surveys with tourists from these segments, where they're consulted to know their profile but also their satisfaction with the city as a tourist destination. Surveys with visitors to the MICE segment are carried out from March to November (the time when these types of events take place) and the survey with cruise ship tourists is carried out between October and April (cruise season in CABA).

During 2019, 1,330 personal surveys were carried out to tourists from the MICE segment at different congresses, conventions, fairs and exhibitions that were held in the city. And, during the 2019-20 season, 1,468 personal surveys were conducted with cruise passengers at the Quinquela Martín Cruise Terminal.

Cruceristas internacionales

@travelBuenosAires

Valoración de los servicios turísticos

| | Muy bueno | Bueno | Regular | Malo | Muy malo | No sabe/ no contesta |

Alojamiento: 46%, 41%, 9%
Gastronomía: 61%, 35%
Shopping: 33%, 52%, 11%
Espectáculos: 56%, 27%, 15%
Excursiones: 46%, 42%, 7%
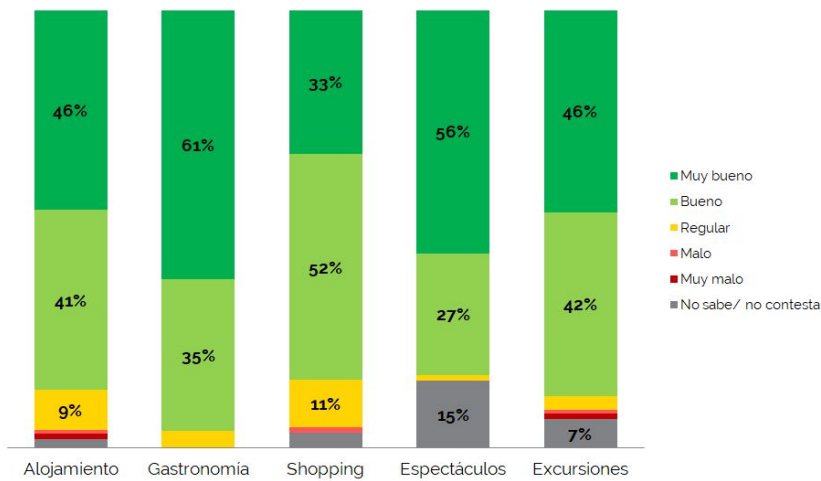
No se presentan diferencias significativas en estas valoraciones con respecto a la temporada anterior

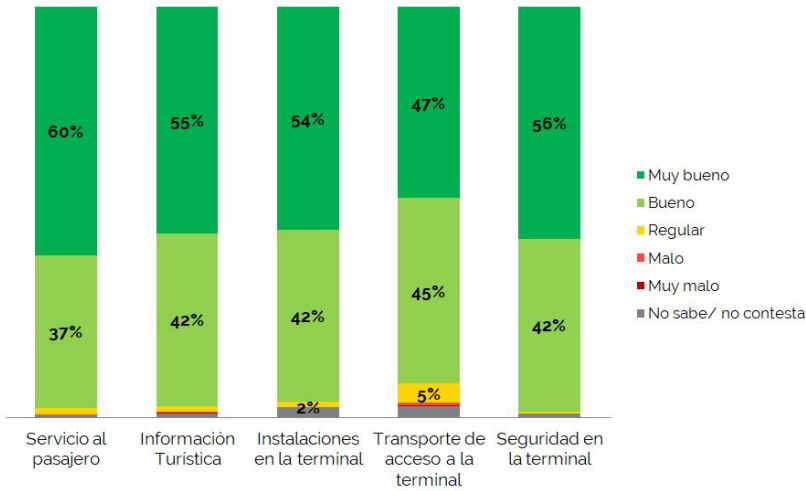Fuente: Dirección General de Inteligencia de Mercado y Observatorio ENTUR.

Base: encuestados que evaluaron cada aspecto.
n = 1112

Figure 28 - Score given to the different areas of city service in the Cruise Tourism Survey during the 2019-2020 cruise season.

Cruceristas internacionales

Valoración de los servicios de la Terminal

Servicio al pasajero: Muy bueno 60%, Bueno 37%
Información Turística: Muy bueno 55%, Bueno 42%
Instalaciones en la terminal: Muy bueno 54%, Bueno 42%, 2%
Transporte de acceso a la terminal: Muy bueno 47%, Bueno 45%, 5%
Seguridad en la terminal: Muy bueno 56%, Bueno 42%

Leyenda:
- Muy bueno
- Bueno
- Regular
- Malo
- Muy malo
- No sabe/ no contesta

Sugerencias de mejora

Wifi

Agilizar el embarque

Fuente: Dirección General de Inteligencia de Mercado y Observatorio ENTUR
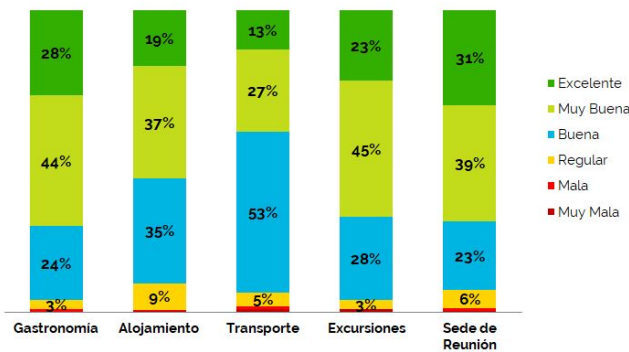
Base: encuestados que evaluaron cada aspecto.
n = 1112

Figure 29 - Score given to the different areas of cruise terminal service in the Cruise Tourism Survey during the 2019-2020 cruise season.

Turistas extranjeros en C&C

¿Cómo califican los servicios de la Ciudad? ¿Regresarían?

40% visita la Ciudad por 1° vez

Gastronomía: Excelente 28%, Muy Buena 44%, Buena 24%, 3%
Alojamiento: Excelente 19%, Muy Buena 37%, Buena 35%, Regular 9%
Transporte: Excelente 13%, Muy Buena 27%, Buena 53%, 5%
Excursiones: Excelente 23%, Muy Buena 45%, Buena 28%, 3%
Sede de Reunión: Excelente 31%, Muy Buena 39%, Buena 23%, 6%

Leyenda:
- Excelente
- Muy Buena
- Buena
- Regular
- Mala
- Muy Mala

99% regresaría a la ciudad

Motivo por el que regresaría*

Motivo por el que regresaría*	
Por ocio	65%
Por otras reuniones / eventos	44%
Por negocios	26%
Por estudio	20%
Para visitar a amigos / familiares	14%

Fuente: Dirección General de Inteligencia de Mercado y Observatorio. ENTUR
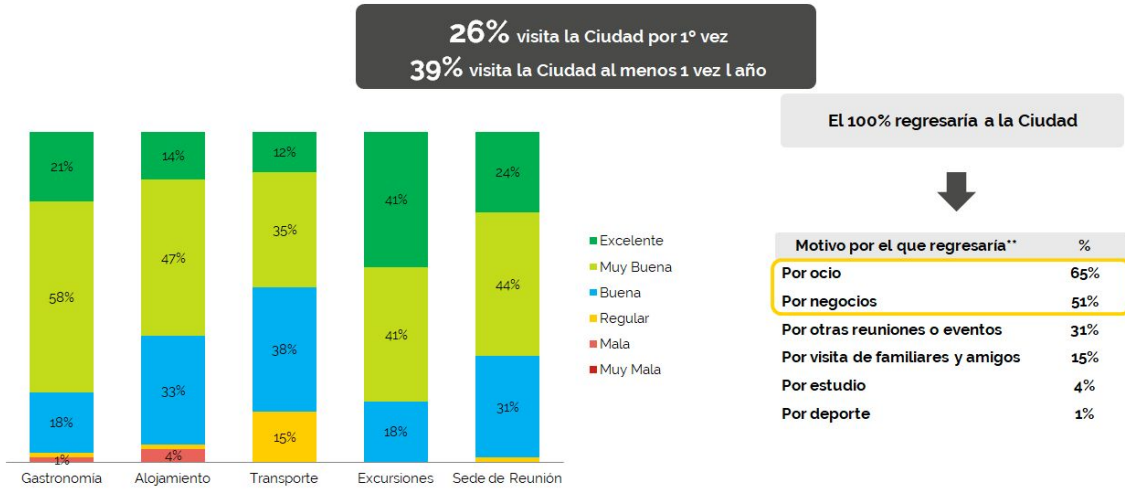
27

** Respuesta múltiple.

N= 644

Figure 30 - Score given to the different areas of city service in the Meetings Survey during the 2019 by international tourists in Conventions & Congresses.

Turistas extranjeros en F&E

@travelBuenosAires

¿Cómo califican los servicios de la Ciudad? ¿Regresarían?*

26% visita la Ciudad por 1° vez

39% visita la Ciudad al menos 1 vez l año

El 100% regresaría a la Ciudad

Motivo por el que regresaría**	%
Por ocio	65%
Por negocios	51%
Por otras reuniones o eventos	31%
Por visita de familiares y amigos	15%
Por estudio	4%
Por deporte	1%

Legend:
- Excelente
- Muy Buena
- Buena
- Regular
- Mala
- Muy Mala

Fuente: Dirección General de Inteligencia de Mercado y Observatorio. ENTUR   38   ** Respuesta múltiple.   n =78
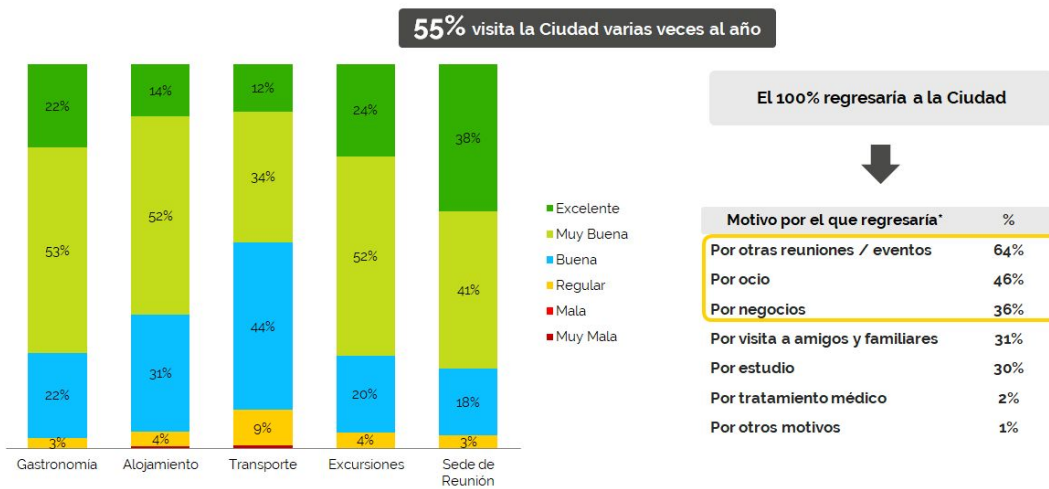
Figure 31 - Score given to the different areas of city service in the Meetings Survey during the 2019 by international tourists in Fairs & Expos.

Turistas argentinos en C&C

@travelBuenosAires

¿Cómo califican los servicios de la Ciudad? ¿Regresarían?

55% visita la Ciudad varias veces al año

El 100% regresaría a la Ciudad

Motivo por el que regresaría*	%
Por otras reuniones / eventos	64%
Por ocio	46%
Por negocios	36%
Por visita a amigos y familiares	31%
Por estudio	30%
Por tratamiento médico	2%
Por otros motivos	1%

Legend:
- Excelente
- Muy Buena
- Buena
- Regular
- Mala
- Muy Mala

Fuente: Dirección General de Inteligencia de Mercado y Observatorio. ENTUR   32   *Respuesta múltiple.   n =411

Figure 32 - Score given to the different areas of city service in the Meetings Survey during the 2019 by national tourists in Conventions & Congresses.

Another important source of information for monitoring the satisfaction of visitors to the city is the permanent survey that is carried out in tourist service centers in the city (CATs), where they're consulted not only about their satisfaction with their experience in the city of Buenos Aires, but also about their satisfaction with the interaction with residents, the quality of care provided by the CAT informant, as well as the services of said tourist service center.
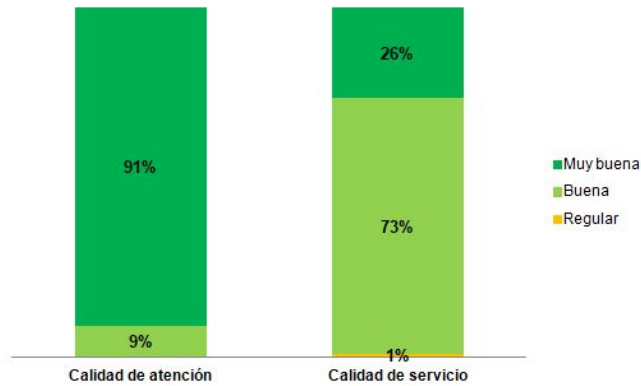

Figure 33 - Score given to the attention and service in the tourist service centers survey from February 2020 to March 2020.
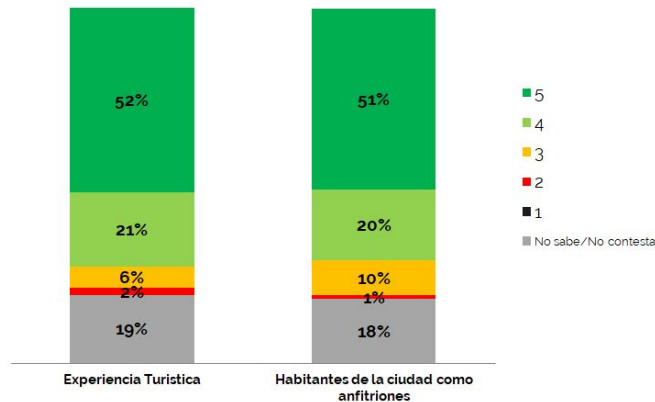

Figure 34 - Score given to the tourism experience and city citizens as hosts in the tourist service centers survey from February 2020 to March 2020.

6440 visitor satisfaction surveys were collected in the tourist service centers of the city during 2019, and 379 were collected during 2020 (January 1st to March 12th). The tourist service centers closed on March 13 due to the COVID19 pandemic, and at the time of writing this report, they have not reopened.

12. Energy, water & waste management

We are improving our efforts to start measuring some indicators of energy, water and waste management related to the tourism activity in the city. In this regard, in 2019 the Hotel Occupancy Survey included some of these sustainability indicators, but due to the pandemic crisis, data processing is delayed and not available yet.

This Survey is aimed at accommodation establishments throughout the country and its main objective is to obtain indicators to improve public actions related to environmental sustainability policies. For this, it is necessary to have information on energy consumption, according to the available energy sources (electricity, gas, etc.) and their uses (heating, cooking and food preparation, lighting, sanitary water heating, etc.), as well as the establishments' treatment of waste and water.

The survey collects information about construction materiales, covered area, last date of renovation and size and type of common areas.

About energy consumption, the survey asks the type of energy sources used, renewable and not renewable, and the amount of electricity and gas consumption per month, as well as how much the establishment spent on it per month, what type of lamps and appliances for cooling, heating, cooking & refrigerating food and cleaning fabric it uses, and whether the establishment generates or can generate in case of emergency its own energy. The survey also asks about measures taken towards responsible energy consumption, like establishing limits to the cooling and heating systems, and programming electrical appliances to turn off automatically.

About water management, the survey asks whether the establishment is connected to the public potable water network, and whether it has a sensor to detect consumption. It asks about monthly water consumption and expenditure, whether it has systems to make secondary use of water, whether it does preventive maintenance on the sanitary installations, and which measures and appliances it uses to optimize water use. The survey also asks about measures taken towards responsible water consumption, like reduced towels replacement schemes.

About waste management, the survey asks how they dispose of solid waste, with which frequency, and whether it separates recyclables, and under which scheme it does so, about whether it provides breakfast and has a restaurant attached, and whether it promotes waste separation among its employees and clients and has politics to reduce generated waste.

In conclusion, the future results of all these new indicators would represent a step forward for the measurement of sustainable tourism in the city.

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