BUENOS AIRES TOURISM OBSERVATORY

INSTO ANNUAL PROGRESS REPORT

Years 2020 - 2021

Acknowledgement

Authors

● Mr. Rodrigo Oliver

Director of the Tourism Observatory of Buenos Aires City: roliver@buenosaires.gob.ar

● Mrs. Silvina Di Giano

Tourism Research Manager: silvinadigiano@buenosaires.gob.ar

● Mrs. Manuela Leiva

Research Analyst: mleiva@buenosaires.gob.ar

● Mr. Axel Pelish

Research Analyst: apelish@buenosaires.gob.ar

Contact information

Tourism Observatory of the City of Buenos Aires:

Uspallata 3160 - Ciudad Autónoma de Buenos Aires

+5411 5091 7419 / 7296

Email: observatorioturistico@buenosaires.gob.ar

Website: https://turismo.buenosaires.gob.ar/en/observatorio

Contents

Graphics List

Graphic 1: Percentage variation of air operations to CABA compared to 2019.

Graphic 2. Air operations to CABA, 2018-2021.

Graphic 3: Percentage variation of total national and international tourists in CABA compared to 2019.

Graphic 4: National tourists staying in CABA hotels per month, 2018-2021.

Graphic 5: International tourists admitted to CABA by airway, 2018-2021.

Graphic 6: Total tourists staying in hotels in CABA per month. 2018-2021.

Graphic 7: Hotel occupancy percentage based on rooms, 2018-2021.

Graphic 8: Weekly air frequencies of arrivals to CABA, 2018-2021.

Graphic 9: Percentage of cruise ship landfalls arrived at the port of the CABA, 2018-2022.

Graphic 10: Evolution of registered employment in the TCA, 2018-2021.

Graphic 11: Annual average of registered employees, 2018-2021.

Graphic 12: Percentage variation in TCA registered employment, 2018-2021.

Graphic 13: Registered employment according to TCA and non-TCA, 2018-2021.

Graphic 14: Percentage variation in TCA and non-TCA registered employment, 2018-2021.

Graphic 15: Evolution of salary (in USD) and percentage evolution of salary in the sector with respect to average general salary, 2018-2021.

Graphic 16 National and international tourism spending (in USD), 2018-2020.

Graphic 17: Percent representation of TCA in GGP, 2018-2021.

Graphic 18: Evolution of total establishments in the CABA, 2018-2021.

Graphic 19: Evolution of occupancy percentage in accommodations in the CABA, 2018-2021.

Graphic 20: Total national and international tourists in the CABA (in millions), 2018-2021.

Graphic 21: Evolution of distinguished tourist providers in environmental management, 2015-2021.

Graphic 22: Evolution of distinguished tourism providers in accessibility, 2015-2021.

Graphic 23: Number of non-resident visitors over total population in CABA, 2018-2021.

Graphic 24: Rating of international tourists on different aspects of the city, 2019.

.**Graphic 25**: Satisfaction of national tourists in general concerning the CABA, 2018-2021.

Graphic 26: Satisfaction of nacional tourists with aspects of CABA. 2018-2020.

Graphic 27: Score given to the different areas of the city service in the Cruise Tourism Survey during the 2019-2020 cruise season.

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

Graphic 29: Qualification of city services by international tourists at MICE events, 2019.

Graphic 30: Qualification of city services by national tourists at MICE events, 2019.

Graphic 31: Score given to the tourism experience and the city citizens as hosts in the Tourist Service Centers Survey. January- March 2020.

Graphic 32: Number of programs implemented by GCBA related to the dimensions of tourism sustainability per year, 2016-2021.

Graphic 33 Number of training activities and promotion of sustainability in Tourism in which the ENTUR participated, 2019-2021.

Figures List

Abbreviations and acronyms used herein

AA2000: Airports Argentina 2000 (by its Spanish acronym)

ABL: Contribution of Lighting, Sweeping and Cleaning, Territorial and Pavements and Sidewalks (by its Spanish acronym)

ANAC: National Civil Aviation Administration (by its Spanish acronym)

APrA: Environmental Protection Agency (by its Spanish acronym)

CABA: Autonomous City of Buenos Aires (by its Spanish acronym)

CAT: Tourist Service Centers (by its Spanish acronym)

CEPAL: Economic Commission for Latin America and the Caribbean (by its Spanish acronym)

COPIDIS: Commission for the Full Participation and Inclusion of Persons with Disabilities (by its Spanish acronym)

DGIMO: General Office of Market Intelligence and Observatory (by its Spanish acronym)

ENTUR: Buenos Aires Tourism Board (by its Spanish acronym)

EOH: Hotel Occupancy Survey (by its Spanish acronym)

ETIS: European Tourism Indicator System

ETI: International Tourism Survey (by its Spanish acronym)

EVyTH: Household Travel and Tourism Survey (by its Spanish acronym)

GCBA: Government of the City of Buenos Aires (by its Spanish acronym)

GDP: Gross Domestic Product

GGP: Geographical Gross Product

GSTC: Global Sustainable Tourism Council

ICCA: International Congress and Convention Association

IGES: Institute for Global Environmental Strategies

INDEC: National Institute of Statistics and Censuses (by its Spanish acronym)

INSTO: International Network of Sustainable Tourism Observatories

LATAM: Latin America

MDEP: Buenos Aires City Ministry of Economic Development and Production (by its Spanish acronym)

MICE: Meetings Incentives Convention and Exhibitions

MTyD: Ministry of Tourism and Sport of the Nation (by its Spanish acronym)

MTEySS: Ministry of Labour, Employment and Social Security of Argentina (by its Spanish acronym)

QS: Quacquarelli Symonds

SGyRI: Buenos Aires City General Secretariat and Foreign Relations (by its Spanish acronym)

SACT: Argentine System of Tourist Quality (by its Spanish acronym)

SDG: Sustainable Development Goals

SIPA: Argentine Integrated Pension System (by its Spanish acronym)

TCA: Tourism Characteristic Activities

TRP: Terminal Río de la Plata

UNWTO: World Tourism Organization

UN: United Nations

WTTC: World Travel & Tourism Council

Foreword

The aim of this progress report is to acknowledge the main work focal points of the Tourism Observatory of the City of Buenos Aires, in connection to the mandatory areas of INSTO, during the years 2020 and 2021.

It is worth mentioning that these years have been pierced by Covid 19 Pandemic, which affected tourist activity in Argentina overall and in the City of Buenos Aires in particular, for most of the period under analysis.

This situation generated a breakup in the production flow of regular information in some public statistics, which processes reactivated during the last part of 2021, with the opening of international tourism in the country. Thus, some indicators, in spite of their importance, lack information during this period.

The return of the activity after the pandemic allowed to reactivate the statistical processes, both regular and specific ones, which will be shown in the 2022 report.

However, and despite the above mentioned difficulties, the pandemic evidenced the importance of the Tourism Observatory as an intelligence tool to support policies of reactivation and future tourism strategies in the destination. Accordingly, the challenge of the Tourism Observatory was the implementation of ad-hoc tools to provide the information needed for decision making on the industry and the visitors during this difficult period.

1. Destination Profile

1.1. City description

The Autonomous City of Buenos Aires is the capital of the Republic of Argentina, and the largest urban area in the country, the second of Latin America and one of the 20 largest cities of the world.

Figure 1: Argentina and the Autonomous City of Buenos Aires.

There are currently 3 million inhabitants in the City of Buenos Aires distributed in 15 communes and 48 neighborhoods, but there are approximately twice as many people who daily commute from the Metropolitan Area to the city.

According to the Global Liveability Ranking, Buenos Aires is among the cities with the highest quality of life and the most livable in Latin America. In addition, its extensive parks, its coastlines and reserves make Buenos Aires an eco-friendly and healthy city. It has more than 100 green areas and it can be toured with the bikeways system. It is also the most sportive city in Latin America.

The main economic activities that contribute to the GGP are developed in the service sector, particularly in communications and transport, finance and business.

The city reveals traditions inherited from multiple cultures. Buenos Aires hosts internal and external migrants: 38% of its residents were not born in the city. During 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 would define it as a cosmopolitan and dynamic city, rich in cultural diversity.
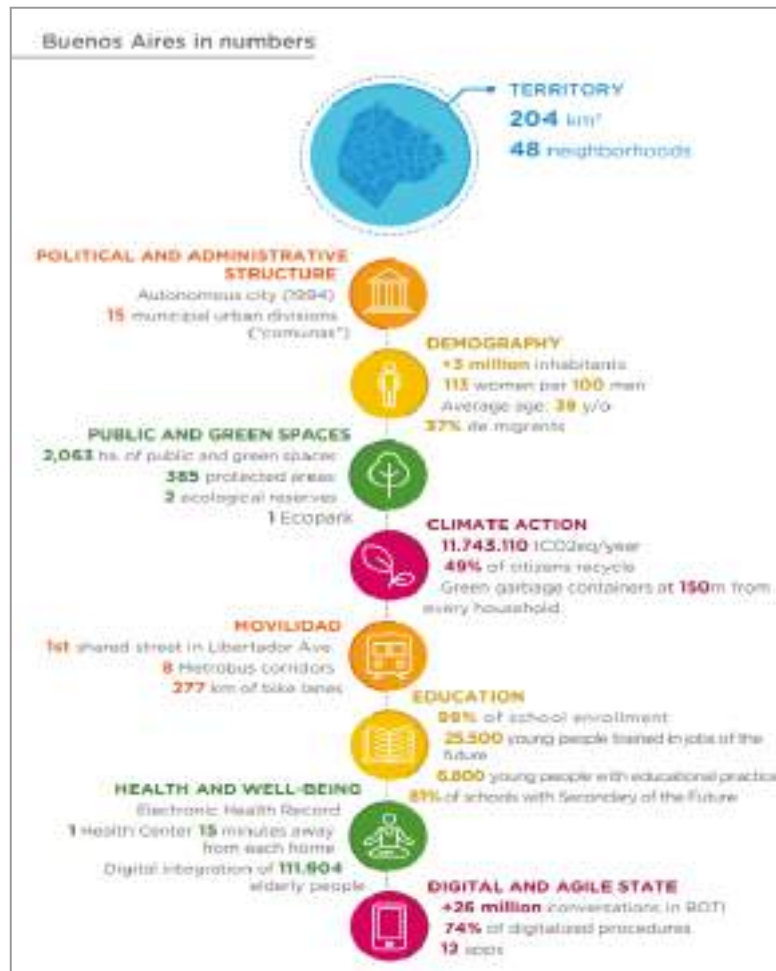
Figure 2: Buenos Aires in numbers.
Source: Buenos Aires IGES Voluntary Local Review, 2021.

1.2. Commitment to the 2030 Sustainable Development Goals

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 Sustainable Development Goals are vital for a recovery that leads to greener, more

inclusive economies, and stronger and more resilient societies, especially after Covid 19 pandemic.

Figure 3: Sustainable Development Goals.

From the cities, we can approach the objectives in a pragmatic way and contribute with local actions to the fulfillment of the proposed goals. The General and International Relations Secretariat 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 the United Nations.

The SDGs localization in the City comprises three fundamental pillars: adaptation, strategic partnerships and awareness-raising. The adaptation corresponds to the process of aligning and prioritizing the Global Objectives to the local reality. This process, in its beginnings, implied the government plan analysis and the coordination and joint work with each government department to prioritize the goals and define the follow-up indicators.
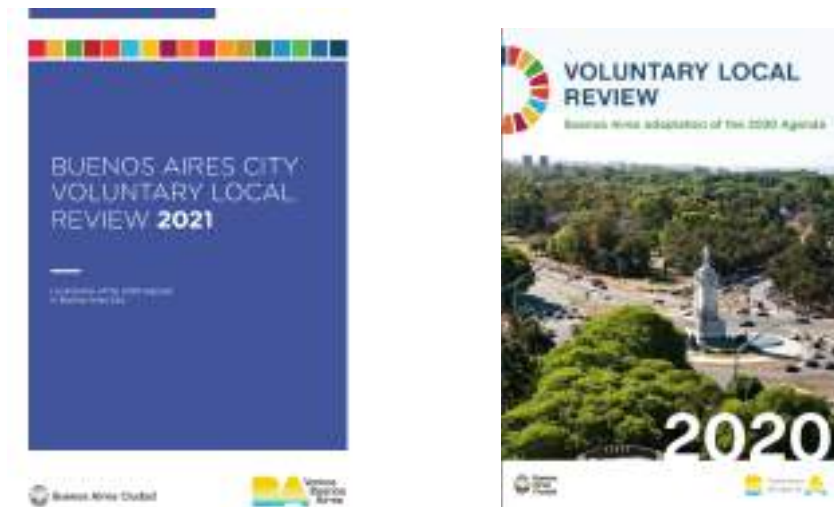
Figure 4: Buenos Aires Sustainable Development Goals Voluntary Local Review 2020-2021.

The Buenos Aires Tourism Board works on the concretion of the Sustainable Development Goals, 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 in the city

With around ten million tourists per year before Covid 19 Pandemic, Buenos Aires was the most visited city in South America (Ranking Euromonitor 2019 "The Top 100 city destinations"). The city is the Number 1 events destination in the Americas according to ICCA (International Congress & Convention Association) Ranking and was elected the

best city to study in Latin America according to the QS World University Ranking for the year 2021[1]. It is also the Latin American city with the most award-winning restaurants (Latin America's 50 Best Restaurants), and in 2020 the "Don Julio" grill was ranked first in the Latin American restaurant ranking.

In 2019, 2.9 million international tourists arrived in the city, which implied a growth of 8.9% compared to the previous year. Bordering countries were the main international tourist issuing markets to the city prior to the pandemic. Brazil (+97.000 tourists) was the market that most contributed to tourism growth by air in 2019. It was followed by the Rest of America (+33.000) and Europe (+24.000).

Figure 5: Origin of international tourists. Main markets. Pre-pandemic (2019). DGIMO-ENTUR.

The city is an important national tourist destination, both for being the capital of the country and for the diversity of attractions and activities that can be carried out. Before the pandemic, Buenos Aires received almost 7 million national tourists, from all the provinces of the country.

The city presents a remarkably eclectic urban profile, highlighted by its cultural offer, pluralism and its nightlife. It is considered the Cultural Capital of Latin America, there are over 300 theatres, 200 libraries, 400 book stores and more than 150 museums. Tango is another important cultural attraction.

---

[1] QS World University Rankings: Top global universities

Architecture in the city depicts the heritage of the different European communities that established in the city in the early 1900s, and throughout the city, visitors can experience different forms of art manifestations.

Gastronomy is another important tourist attraction. It is possible to experience the fusion of the european heritage and the latin flavors in its many gastronomy opportunities. There are options from local steakhouses, historic coffee stores, gastronomic markets, high-end restaurants and a great range of speakeasy bars.

The city also offers outdoor activities and green areas to visit. It is possible to sail along the Rio de la Plata River all the way to Tigre neighborhood or to walk the trails of the Ecological Reserve in Puerto Madero, visit the Palermo Parks and the Botanical Gardens or the Japanese Gardens.

Sporting events are important attractors of tourism to the city: the best polo in the world is found in Buenos Aires, and experiencing a football game in one of its famous stadiums is an experience classified as unique due to the passion that the fans show in each game.

1.4. Tourism Observatory of the City of Buenos Aires

The Buenos Aires Tourism Board is the body in charge of the public management of tourism in the destination, under the authority of the General Secretariat of International Relations of the Government of the City of Buenos Aires.

The Tourism Observatory of the city is conceived as a public asset, which aim is to generate quality information to decide on tourism in the city.

Among the main objectives of the Observatory, the following can be mentioned:

- Generate key information of tourism to guide the decision-making in both the public and private sector.
- Identify key tendencies of the sector.
- Give relevant data to highlight the social and economic importance of tourist activity in the city.

In order to comply with the proposed objectives, the Observatory works in three wide areas: First, an area of Tourism basic statistics analysis, coming from secondary sources, mainly. Then, another ad-hoc study area, focused on the analysis of tourism experience from the perspective of both visitors and residents. And finally, a recent

development area, focused on big data analysis coming from public and private databases, such as mobile telephony, credit card consumption, users opinions on websites about tourist attractions, gastronomy and accommodation, among others.

Figure 6: The Buenos Aires Tourism Observatory areas of work.

Thus, information as regards the different "consumer journey" stages of tourists is gathered by the Observatory in order to describe behaviors and spot opportunities for the development, promotion and communication of the tourist destination.

The information produced is available, unrestricted and for free, at the website of the Observatory: **https://turismo.buenosaires.gob.ar/en/observatorio**, in order to be used for decision-making processes in the public or private sector. In this website, dashboards with data coming from big data are posted, as well as reports with the main statistical data from tourism in the city and with the results from specific studies carried out, for example, in particular tourist segments (cruises, gastronomy, studies, MICE, etc.).

2. COVID 19 Pandemic: Tourist activity and role of the Observatory

2.1. Tourism in the context of COVID- 19

Tourism was one of the most affected industries due to the Covid 19 pandemic worldwide. In Argentina, the impact in the sector began in March 2020 with the restriction of arrivals of international flights to the country, the closure of borders and the declaration of the mandatory social isolation (March 19, 2020).

During the years 2020 and 2021, some pilot tests were carried out to open the country to international tourism, but the final reopening of borders in the country took place in November 2021, after almost 20 months from the first closure due to the pandemic.

Regarding Argentina, the impact of the measures implemented is seen in the drastic decrease in the number of commercial air operations in 2020 compared to 2019: domestic operations were reduced by 72% and international operations were reduced by 73%. During 2021, national air connectivity was partially recovered, despite of being still quite below the frequencies of 2019 (-53%). On the contrary, the decrease in international air connectivity deepened during such year.

Specifically to the city of Buenos Aires, the total number of commercial domestic flights fell by 75% in 2020 compared to 2019, while international operations fell by 73%. In 2021, domestic operations towards the city increased significantly compared to 2020 (+87%), but it was different for international commercial operations, which deepened their fall (- 8%).
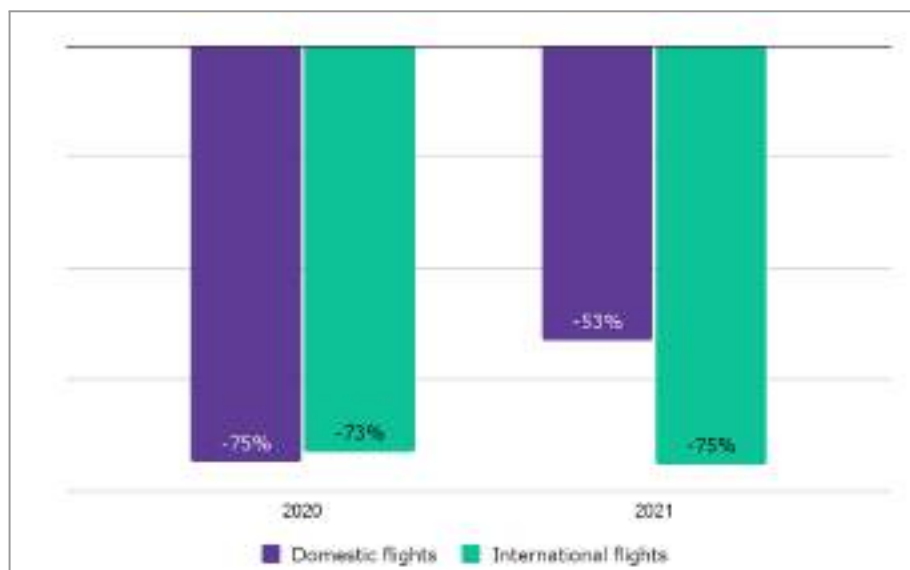
Graphic 1: Percentage variation of air operations to CABA compared to 2019, according to type of operations. Source: DGIMO-ENTUR based on ANAC data.

Graphic 2: Air operations to CABA, 2018-2021.
Source: DGIMO-ENTUR based on ANAC data.

Accommodation for tourist purposes in hotels of the city was interrupted as from March 2020, and some establishments were used for the isolation of residents coming from abroad during the quarantine period in order to prevent potential contagions. By the end of the year 2020, the progressive reopening of establishments began in order to address, mainly, the domestic demand.

Due to the pandemic, during the year 2020, the city experienced a significant fall concerning the amount of tourists received compared to 2019 (record year for international tourism in Buenos Aires). During 2020, the city received 79% less international tourists and 76% less national tourists compared to 2019. During the year 2021, and in line with the global trend, national tourism was the engine concerning the recovery of the activity in the city. However, the arrival of national tourists was 61% below the levels of 2019.
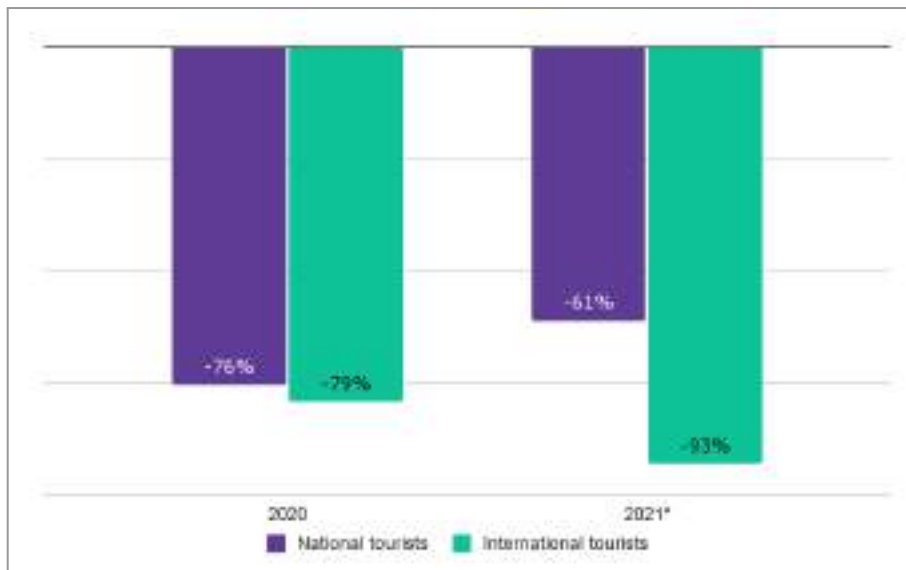
*2021 provisional data due to methodology review.

Graphic 3: Percentage variation of total national and international tourists in the CABA compared to 2019. Source: DGIMO-ENTUR based on EOH, ETI and EVyTH data.

2.2. Pandemic management by the Buenos Aires Tourism Board

The city of Buenos Aires decided to work closely with the tourism sector to develop accurate strategies once the mandatory isolation was over. In this regard, Buenos Aires worked 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.

During 2020 and 2021, 507 tourist providers in the city obtained the "Safe Travels" seal, among which we can find accommodation, travel agencies, transportation services, tourist guides and gastronomic establishments, among others.

Figure 7: ENTUR's Safe Travels Report.

The government also determined strategies to help the tourism businesses fight the COVID-19 and adapt to the new normality, such as 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, and the temporary cancellation 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, a comprehensive plan to reactivate tourism. Among the current main actions to keep the destination working were: (1) redefining markets and segments; (2) sharing stories of resilience; and (3) developing programs and actions. Moreover, this Task Force aimed to keep the city as a leading urban destination in Latin America to live and work, study and do business.

2.3. Role of the Observatory

2.3.1. Data governance

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 international and national visitors remaining in the

city. The survey was carried out daily, until all the visitors were able to return to their places of residence.

The information obtained could be viewed in a Power BI dashboard, which allowed to view in real time the situation of tourists that remained in hotels of the city -according to type, hotel location and host origin– to make a decision concerning the return of such tourists to their places of origin.
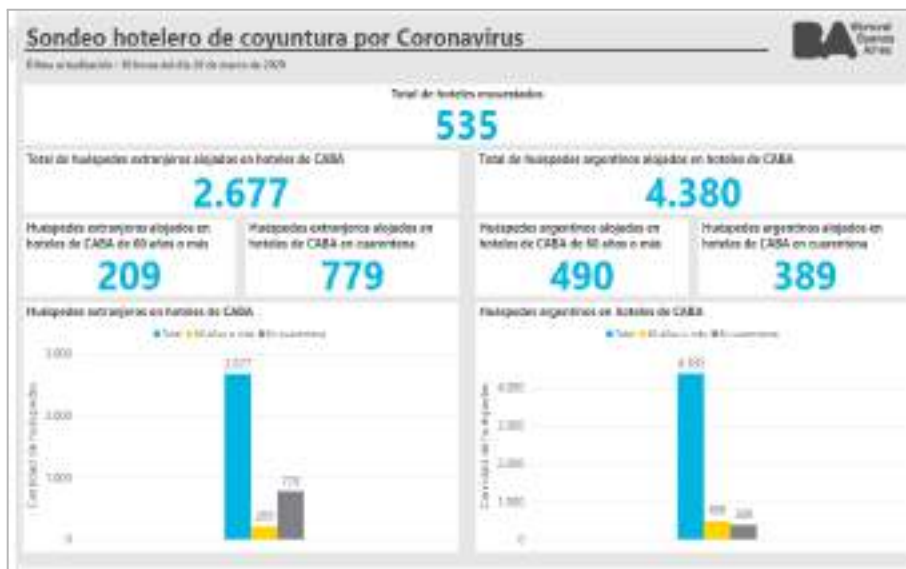
Figure 8: Survey panel of remaining visitors in CABA hotels during the first stage of the pandemic.

Figure 9: Geolocation of remaining visitors in CABA hotels during the first stage of the pandemic.

During this first stage, the team also created a dynamic dashboard including data of arrivals from repatriation flights, in order to contribute to organising the isolation measures for the residents in hotels (who were to remain in quarantine for 15 days). In this dashboard, data concerning the number of residents hosted per hotel, neighbourhood of residence, date of arrival and place of origin could be viewed, among other data.

Figure 10: Dashboard of residents returning to the CABA on repatriation flights.

In June 2021, the team of the Observatory participated in a survey in the territory concerning the status of commercial establishments in the City Center (*Microcentro*) in order to identify the level of establishments closed as a consequence of the pandemic in one of the most affected neighbourhoods due to the closure of stores.

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.

2.3.2. Active participation in the management of the pandemic

From the closure of Argentine borders (March '20) and until September 2021, the staff of the Observatory participated in many general activities of the City Government,

aimed to administrate necessary services for a higher efficiency in the management of the pandemic.

The following can be mentioned:

- *Volunteering in hotels of repatriates:* Comprehensive reception and management of accommodation for Argentine residents who were returning from trips abroad and were to remain in quarantine in hotels of the city intended for that purpose.

- *Management of the public space*: Information in the public road and guidance to neighbours in parks and squares of the city.

- *Testing and vaccination centers:* Support tasks in different testing and vaccination centers for Covid 19.

- *Diffusion of protection measures* against Covid 19 in private residential buildings of the city.

- *Campaign of telephone assistance for the elderly:* Proactive calls to give advice on protection and support measures for adults over 70 in the city.

- *Covid 19 testing center at Ezeiza International Airport:* Advice for passengers and organization of testing operations for national and international travelers coming to the city of Buenos Aires, arriving at Ezeiza Airport.

Figure 11: Tasks in vaccination centers and Covid testing centers.

Figure 12: Diffusion tasks of prevention measures.

Figure 13: Tasks at the Covid testing center at Ezeiza International Airport.

3. Sustainability indicators: systematization framework and process

3.1. Reference framework

This report starts from the definition of sustainable tourism provided by UNWTO, *"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities".[2]*

In this line, sustainability principles in tourism refer to the environmental, economic and socio-cultural aspects.[3] Thus, the tourism management of the destination should:

- Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders.
- Make optimal use of environmental resources, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.

For such reason, it is vital to have indicators that enable to monitor the evolution of the aspects mentioned in order to improve the planning process and the comprehensive management of the destination. To that end, the model suggested by the INSTO network is taken into account, with the different mandatory issues for each of the dimensions of Sustainable Tourism.

Figure 14: Dimensions and mandatory issues of Sustainable Tourism- DGIMO-ENTUR based on INSTO and ETIS.

---

[2] UNWTO: https://www.unwto.org/sustainable-development

[3] UNWTO (2005): Indicators of Sustainable Development for Tourism Destinations. A Guidebook.

3.2. Systematization process and selection of indicators

As starting point of the process, a compilation of background information was performed concerning the recommendations on the measurement of sustainable development in tourism worldwide, from which a methodological proposal to be applied in the city of Buenos Aires was developed.

In this regard, the most relevant background information was recorded, the national universities with trainings regarding this subject were listed, a proposal of indicators to measure the sustainability of tourism in the city was presented and some lines of work were proposed in order to be applied.

Some of the documents consulted were:

- UNWTO (2005). Indicators of Sustainable Development for Tourism Destinations. A Guidebook.
- Global Sustainable Tourism Council (2019). GSTC Destination Criteria.
- European Commission (2016). The European Tourism Indicator System. ETIS toolkit for sustainable destination management.

From the analysis, a comparative grid with the indicators suggested by UNWTO and by ETIS was developed, organized according to the four central dimensions of sustainability (Environmental, Social, Economic and Governance), which were disaggregated into different areas.

Then, a pre-selection of indicators to be reported was made regarding the City of Buenos Aires, and the potential sources of information were tracked. At this stage, meetings were held within the Tourism Board, with different areas of the Government of the City and with the Ministry of Tourism and Sport of the Nation, in order to know the availability of the data required and the assurance of periodicity in the provision of such data. Based on the outcome of these meetings, and on the specific availability of the data, the final selection of indicators, reported below, was made.

4. Checklist on INSTO
Issue Areas

ISSUE AREA	INDICATOR	SOURCE	STATUS
1. Local satisfaction with tourism	Tourism intensity	DGIMO (ENTUR-GCBA) International Tourism Survey (ETI-INDEC) Household Travel and Tourism Survey (EVyTH-MTyD) Hotel Occupancy Survey (EOH-INDEC) National Population Census (INDEC)	Available
	Resident satisfaction with tourism	Qualitative studies with city residents (DGIMO-ENTUR-GCBA)	Available
2. Economic benefits of the destination	Total tourism spending and per trip	International Tourism Survey (ETI-INDEC) Household Travel and Tourism Survey (EVyTH-MTyD)	Available
	Share of TCA in the GGP of the city	Buenos Aires City Ministry of Economic Development and Production (MDEP-GCBA)	Available
	Number of hotels and para-hotels in the city	Hotel Occupancy Survey (EOH-INDEC)	Available
	Percentage of hotel occupancy rate	Hotel Occupancy Survey (EOH-INDEC)	Available
	Total number of tourists	Hotel Occupancy Survey (EOH-INDEC) International Tourism Survey (ETI-INDEC) Household Travel and Tourism Survey (EVyTH-MTyD)	Available
3. Employment	Total number of registered employees in the tourism sector	Integrated Argentine Social Security System (SIPA-MTEySS)	Available
	Number of registered employees per activity	Integrated Argentine Social Security System (SIPA-MTEySS)	Available
	Proportion between employment in the tourism sector and total employment	Integrated Argentine Social Security System (SIPA-MTEySS)	Available
	Average salary of registered employments in accommodation and gastronomy	Integrated Argentine Social Security System (SIPA-MTEySS)	Available
4. Tourism seasonality	Arrival of national and international tourists per month	Hotel Occupancy Survey (EOH-INDEC) International Tourism Survey (ETI-INDEC)	Available
	Tourists staying in hotels per month	Hotel Occupancy Survey (EOH-INDEC)	Available
	Weekly air frequencies	National Civil Aviation Administration (ANAC) Aeropuertos Argentina 2000 (AA 2000)	Available
	Number of cruise ships landfalls per month	Terminal Rio de la Plata (TRP)	Available
5. Energy management	Number of distinguished providers in the "Environmental Management Guidelines for Tourism Providers" program	Argentine System of Tourist Quality (MTyD) Buenos Aires Tourism Board (ENTUR-GCBA)	Available

	Number of hotels that follow sustainability guidelines	Hotel occupancy survey on long weekends (DGIMO-ENTUR-GCBA)	Planned for 2023
6. Water management	Number of distinguished providers in the "Environmental Management Guidelines for Tourism Providers" program	Argentine System of Tourist Quality (MTyD) Buenos Aires Tourism Board (ENTUR-GCBA)	Available
	Number of hotels that follow sustainability guidelines	Hotel occupancy survey on long weekends (DGIMO-ENTUR-GCBA)	Planned for 2023
7. Waste water management			Not available
8. Solid waste management	Number of distinguished providers in the "Environmental Management Guidelines for Tourism Providers" program	Argentine System of Tourist Quality (MTyD) Buenos Aires Tourism Board (ENTUR-GCBA)	Available
	Number of hotels that follow sustainability guidelines	Hotel occupancy survey on long weekends (DGIMO-ENTUR-GCBA)	Planned for 2023
9. Governance	Number of sources of information from the private sector	General Office of Market Intelligence and Observatory (ENTUR-GCBA)	Available
	Number of programs linked to sustainability in tourism implemented by the Government of the City of Buenos Aires	General Office of Market Intelligence and Observatory (DGIMO-ENTUR-GCBA)	Available
	Number of activities promoting sustainability in tourism in which the Buenos Aires Tourism Board participated	General Office of Market Intelligence and Observatory (DGIMO-ENTUR-GCBA)	Available
10. Climate Action			In progress
11. Accessibility	Number of distinguished providers in the program: "Accessibility Guidelines"	Argentine System of Tourist Quality (MTyD) Buenos Aires Tourism Board (ENTUR-GCBA)	Available
	People with disabilities in the travel group	Cruise Tourism Survey (DGIMO-ENTUR-GCBA) MICE Tourism Survey (DGIMO-ENTUR-GCBA) Tourist Service Centers Survey (ENTUR-GCBA)	Available
12. Tourist satisfaction	Tourists' level of satisfaction	International Tourism Survey (ETI-INDEC) Household Travel and Tourism Survey (EVyTH-MTyD) Cruise Tourism Survey (DGIMO-ENTUR-GCBA) MICE Tourism Survey (DGIMO-ENTUR-GCBA) Tourist Service Centers Survey (ENTUR-GCBA)	Available

5. Economic Dimension

5.1. 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 per month, the total number of tourists staying in hotels per month, the frequency of flights arriving to the city and the number of cruise ship landfalls per month.

5.1.1. Arrival of national and international tourists per month

We estimate seasonality for national visitors in the city using the monthly Hotel Occupancy Survey (EOH), which provides the necessary granularity. Regarding international visitors, the International Tourism Survey (ETI), developed by the Ministry of Tourism of the Nation jointly with INDEC (National Institute of Statistics and Censuses), is used as a source.

As seen in the graphics below, the City of Buenos Aires does not show great variations concerning the arrival of visitors, but it maintains a relatively stable number of tourists throughout the year. However, when it comes to national tourism, the maximum number of arrivals is seen during July, which coincides with the winter holidays in the country, and a fall during the summer season (December to February). On the contrary, the arrival of international visitors intensifies during the months of December and January.

During the period being analyzed (years 2020 and 2021), the arrival of visitors was limited by the sanitary measures and restrictions imposed as a consequence of the pandemic, which prevents the analysis of seasonality due to its atypical nature.
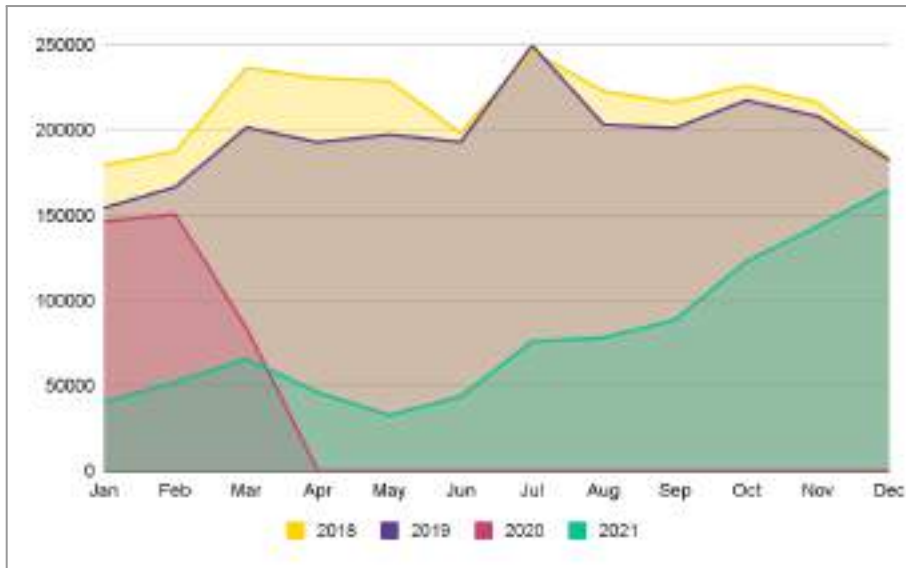
Graphic 4: National tourists staying in CABA hotels per month, 2018-2021.
Source: DGIMO-ENTUR based on EOH data.
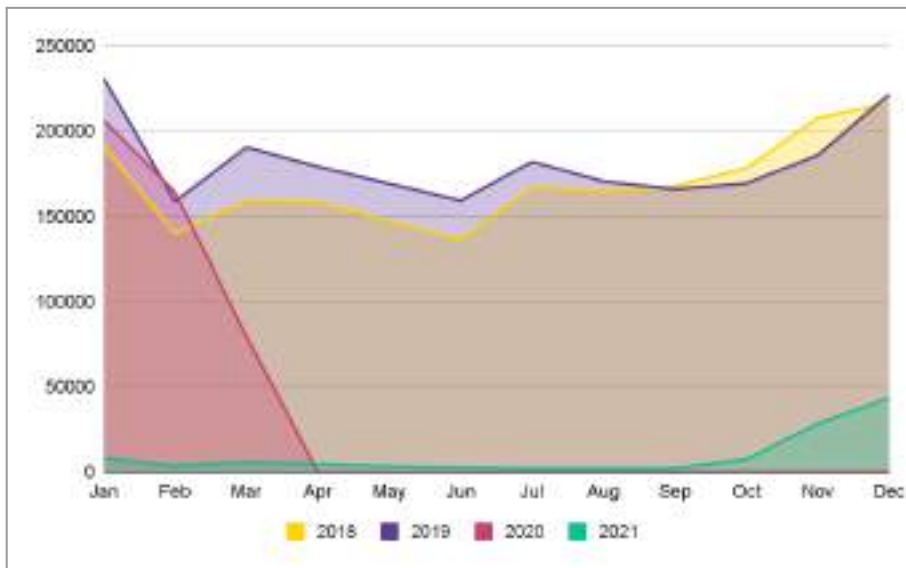
Graphic 5: International tourists admitted to the CABA by airway, 2018-2021.
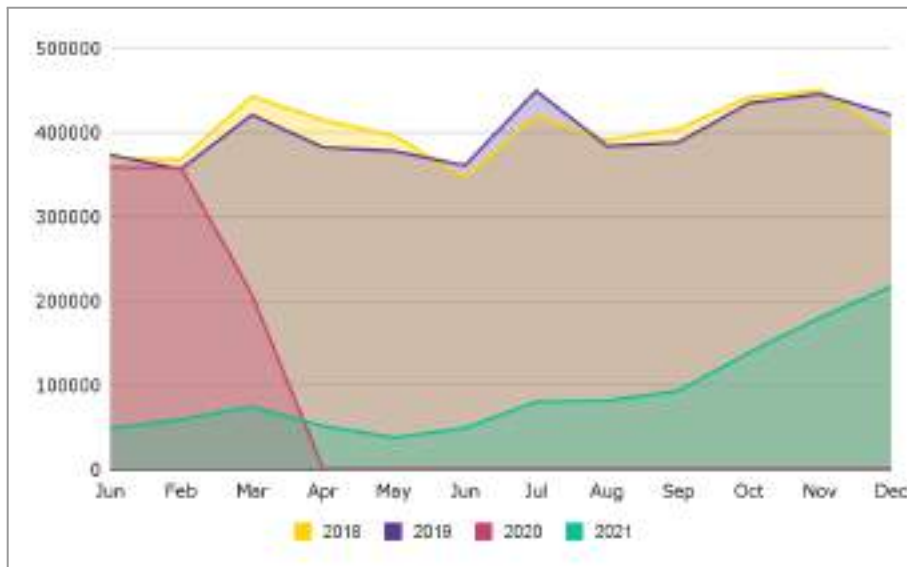**Source: DGIMO-ENTUR based on ETI data.**

5.1.2. Tourists staying in hotels per month

Another indicator that enables to monitor seasonality is the total number of tourists staying in hotels per month, which is obtained from the Hotel Occupancy Survey (EOH). During the years before the pandemic, the months of March, July and

November had the largest number of visitors staying in hotels. During the years of 2020 and 2021, the amount of tourists in hotels varied due to the restrictions and measures adopted as a consequence of the pandemic.

Graphic 6: Total tourists staying in hotels in the CABA per month. 2018-2021.
Source: DGIMO-ENTUR based on EOH data.

In addition to this indicator, the occupancy percentage concerning the rooms offered by hotels of the city was analyzed, the data of which can be seen in the following graph.
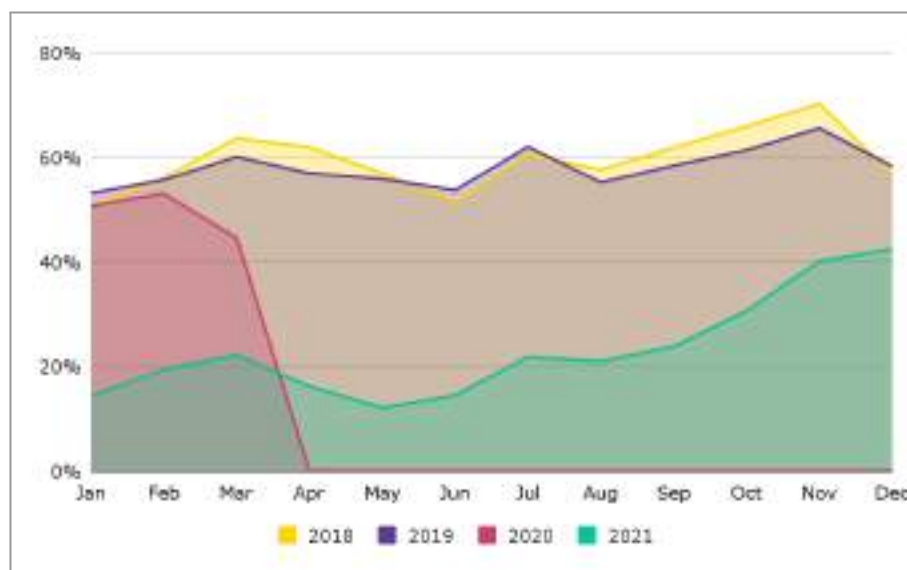
Graphic 7: Hotel occupancy percentage based on rooms, 2018-2021.
Source: DGIMO-ENTUR based on EOH data.

5.1.3. Weekly air frequencies

The observatory monitors air activity at airports with an impact on the tourism of the city considering two sources: the National Civil Aviation Administration (ANAC) and Airports Argentina 2000 (AA2000 - company that manages the airport operations in the country). For the analysis, the average frequency of weekly arrivals to the city of Buenos Aires is taken as reference.

International air frequencies to the city of Buenos Aires increase during the months of December, January and February, coinciding with the period of greatest influx of international tourists. Although the frequencies of national arrivals do not show such a marked seasonality, they increase slightly in July and August, coinciding with the period of winter holidays at the national level.
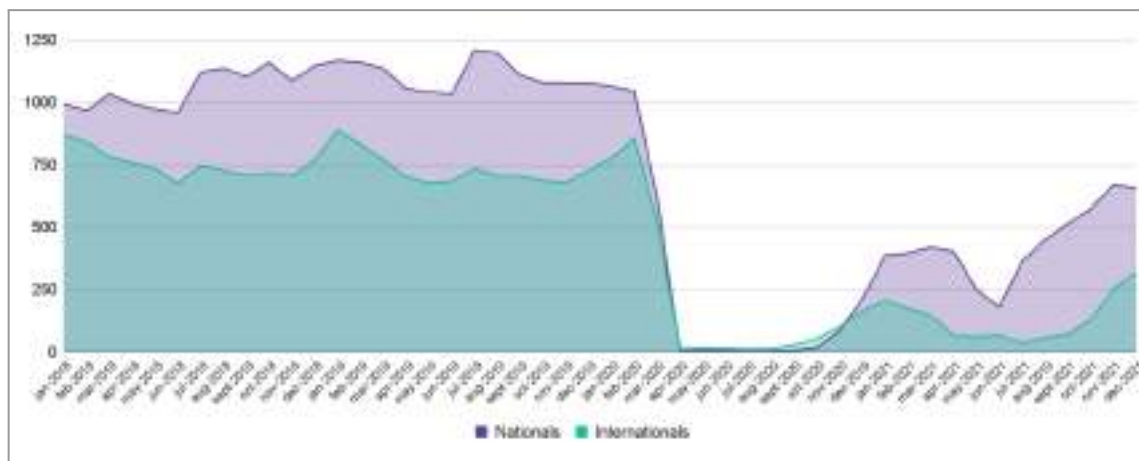
Graphic 8: Weekly air frequencies of arrivals to CABA, 2018-2021.
Source: DGIMO-ENTUR based on ANAC and AA2000 data.

5.1.4. Number of cruise ships landfalls per month

Due to the impact of cruise activity on the city's tourism industry, a monitoring of the number of landfalls and their distribution during the season, between October and April, is conducted.

For the 2019-2020 season, an increase in the number of landfalls was expected compared to the previous season (+20%), but the operations were cancelled in March 2020 due to the pandemic. Therefore, the expected goal was not reached. During

season 2020-2021, there was no cruise ship activity in the city, the activity was resumed during season 2021-2022 with a very low level of operations (10 landfalls).

The arrival of cruise ships has high seasonality. Before the pandemic, almost 80% of landfalls took place during the months of December, January and February, period that concentrated more than 75% of the passengers transported. Season 2020-2021 is atypical due to the irregularity of operations and their low number.
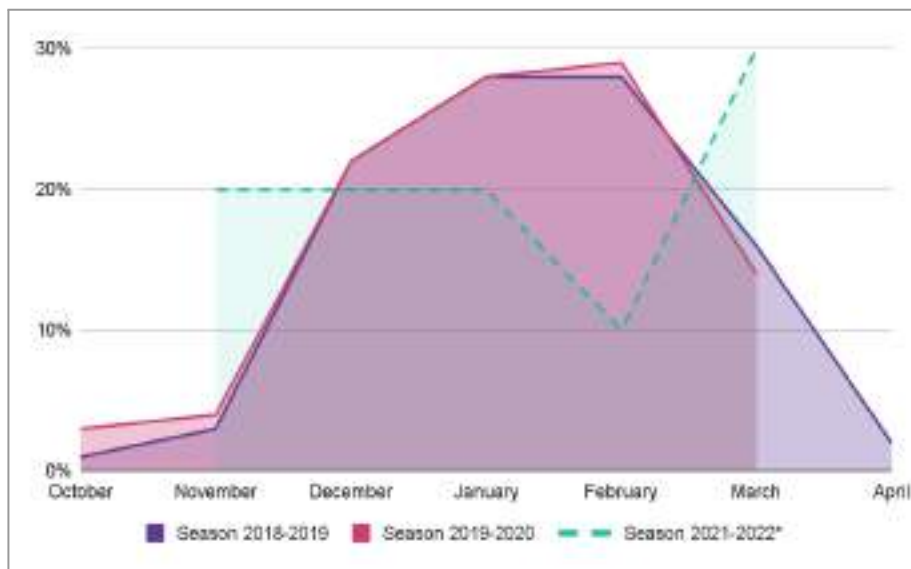
Graphic 9: Percentage of cruise ship landfalls arrived at the port of the CABA, 2018-2022.
Source: DGIMO-ENTUR based on TRP data. *2021 Atypical season due to Covid 19.

5.2. Employment

5.2.1. Total number of registered employees in the tourism sector

The annual average of registered employees in the key branches of tourism in the city (accommodation, gastronomy, transport, and other tourist services) was 134,783 during 2020 and 120,769 during 2021, which implied 8% and 17% less respectively compared to the number of registered employees during 2019. In this report, and based on the data source available for employment assessment, accommodation, gastronomy, transport, and other tourist services are considered key branches of tourism.
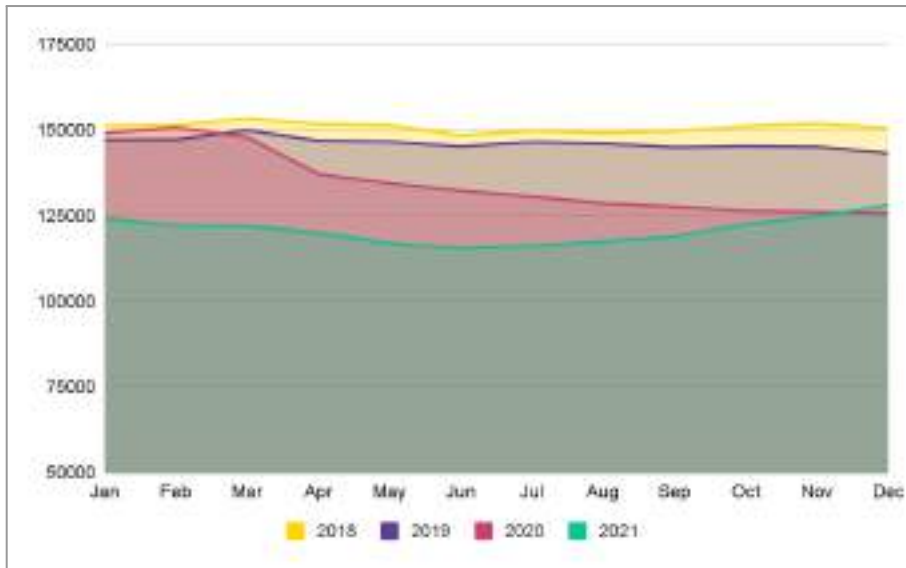
Graphic 10: Evolution of registered employment in the TCA, 2018-2021.
Source: DGIMO-ENTUR based on SIPA data.

5.2.2. Number of registered employees per activity

The gastronomic sector concentrates the largest number of employees of the TCA in the city, representing 44%. Transport has increased its participation from 21% in 2019 to 23% in 2021. Accommodation – the activity with the lowest number of registered employees in the sector – has reduced its participation from 11% in 2019 to 9% in 2021.
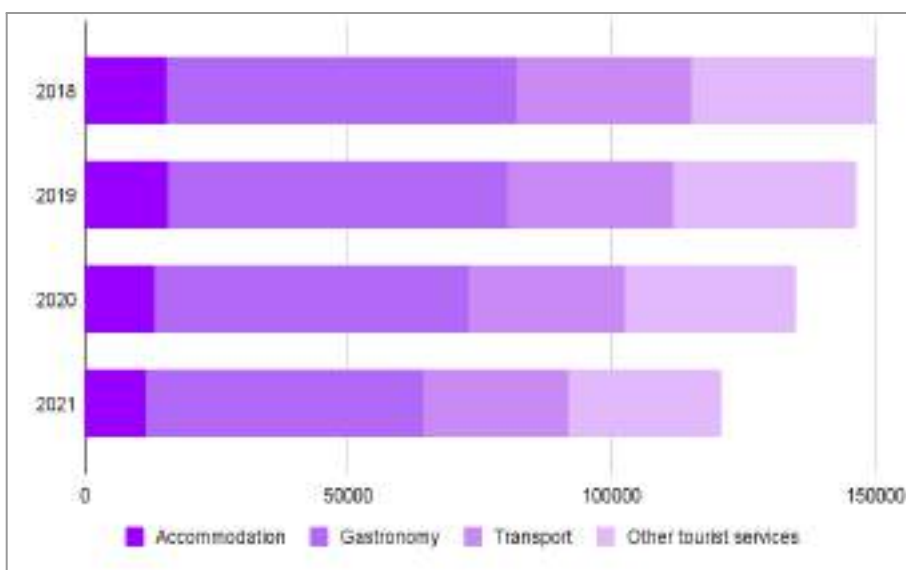
Graphic 11: Annual average of registered employees, 2018-2021.
Source: DGIMO-ENTUR based on SIPA data.

Taking March 2018 as reference (month with the highest number of registered employees), it is clear that the accommodation branch has experienced the greatest growth between November 2019 and February 2020, but at the same time, it is the one that shows the largest drop due to the pandemic (- 33% in June 2021), followed by the gastronomic sector (27% decrease during the same month of 2021).
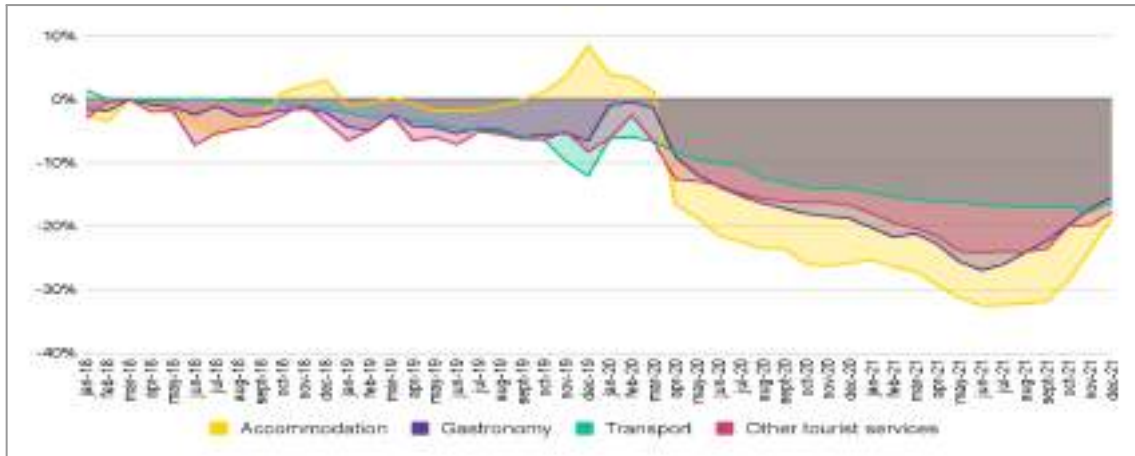
**Graphic 12: Percentage variation in TCA registered employment, 2018-2021. Reference: March 2018
Source: DGIMO-ENTUR based on SIPA data.**

5.2.3. Proportion between employment in the tourism sector and total employment

Registered employment in the key branches of tourism in the city (Accommodation, gastronomy, transport and other tourist services) represented 6.5% of total employment in 2020 and 5.8% in 2021.
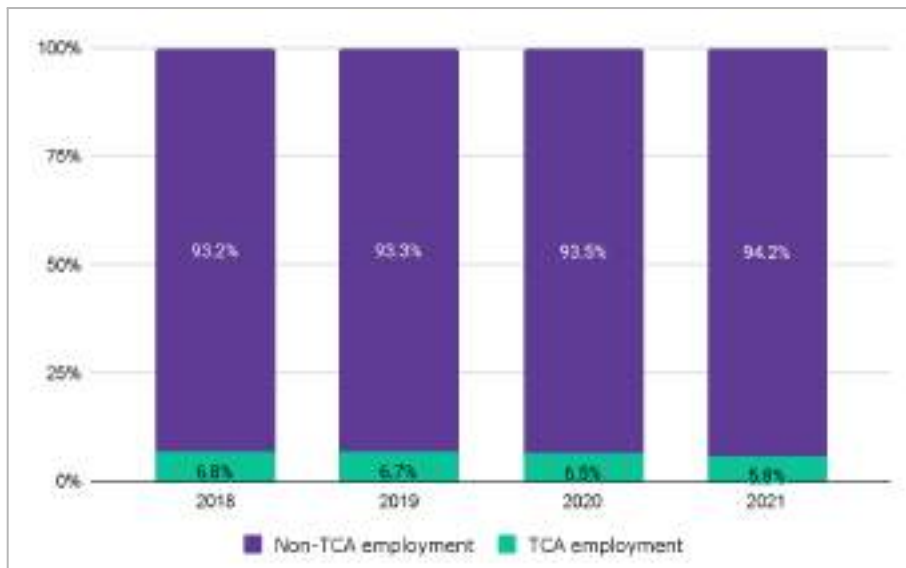
Graphic 13: Registered employment according to TCA and non-TCA, 2018-2021.
Source: DGIMO-ENTUR based on SIPA data.

During the pandemic, employment in the tourism sector of the city had a greater impact than those of other sectors. If we take March 2018 as reference (maximum employment level of the period), non-TCA employment experienced a maximum drop peak of 7% (May 2020), while TCA employment had a maximum drop peak of 25% (June 2021).
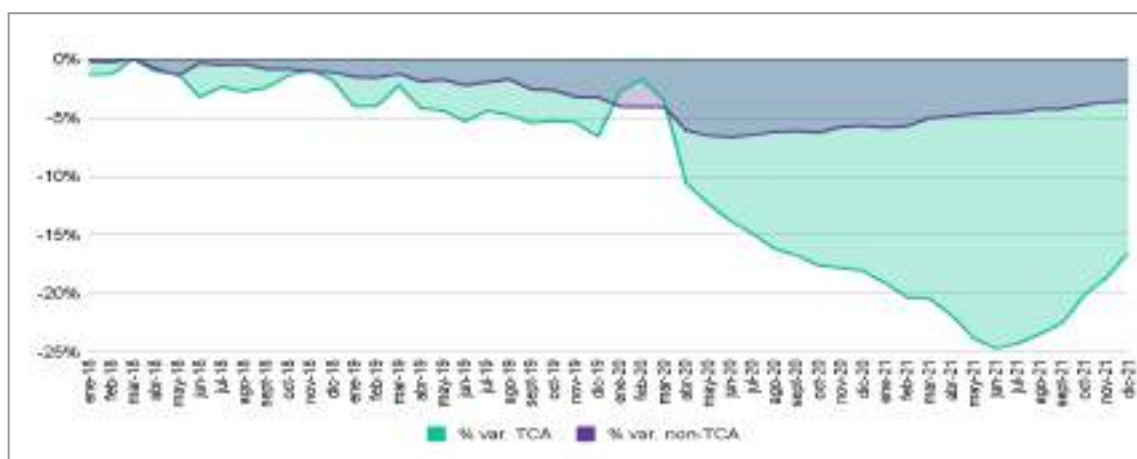
Graphic 14: Percentage variation in TCA and non-TCA registered employment, 2018-2021. Reference March 2018. Source: DGIMO-ENTUR based on SIPA data.

5.2.4. Average salary of registered employments in accommodation and gastronomy

The average salary of registered employees in accommodation and gastronomy decreased in 2020 and in 2021 compared to 2019. Nevertheless, in 2021 a recovery of 10% is seen compared to the previous year.

The average salary of formal employment in accommodation and gastronomy is 62% lower than the average salary of all the productive activities of the city for 2020 and 2021.
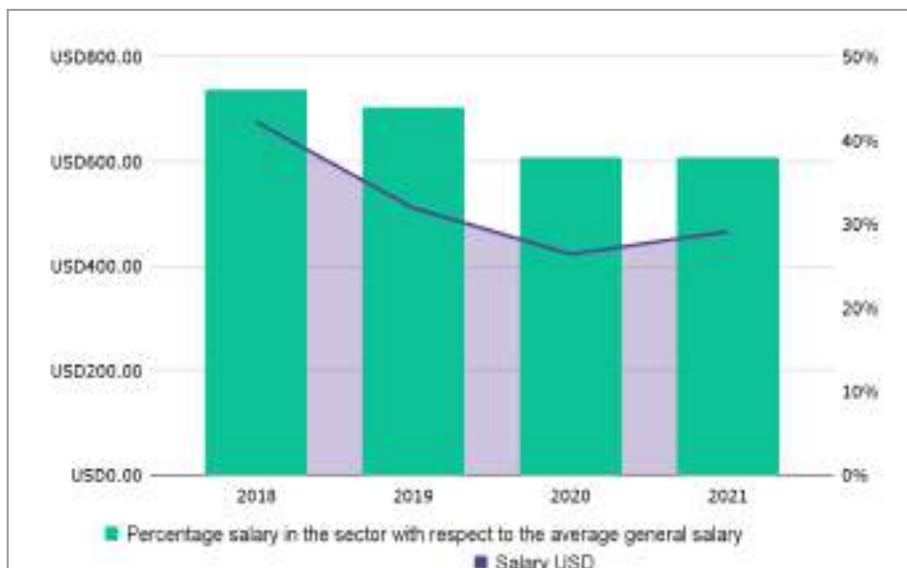
Graphic 15: Evolution of salary (in USD) and percentage evolution of salary in the sector with respect to average general salary, 2018-2021. Source: DGIMO-ENTUR based on SIPA data.

5.3. Economic benefits of the destination

5.3.1. Total tourism spending and per trip

The sources used to estimate tourism spending are the Household Travel and Tourism Survey, the International Tourism Survey and data from the National Directorate of Migration.

In 2020, the total international tourist spending was USD 382 M (-79% vs. 2019) and the total domestic tourist spending was USD 155 M (-76% vs. 2019).

The average spending per trip for international tourists in 2020 was USD 601, somewhat lower compared to 2019 (USD 628). As for domestic tourists, the average spending per trip in 2020 was USD 92, similar to 2019 (USD 93).
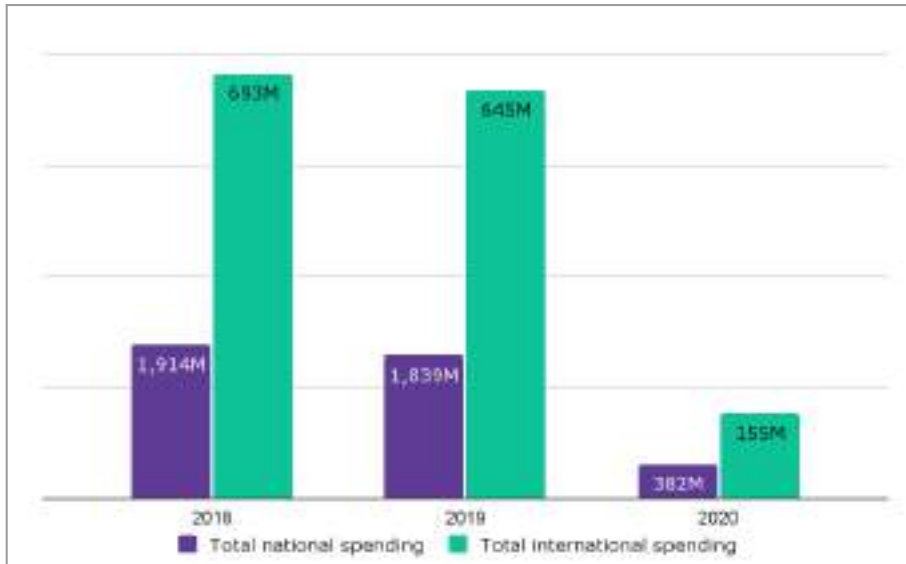
Graphic 16: National and international tourism spending (in USD), 2018-2020.
Source: DGIMO-ENTUR based on ETI and EVyTH data. *2021 data in process.

Figure 15: Tourist spending per visit. Source: DGIMO-ENTUR.

5.3.2. Share of TCA in the GGP of the city

The consequences of the pandemic in the tourism sector are also evident in the fall in the relative share of the tourism activities in the GGP of the city.

According to the information provided by the Undersecretary of Economic Development and Production within the City's Ministry of Economic Development and Production, Tourism accounted for 6.5% of the total GGP of the city in 2019, which decreased its share to 4.3% in 2020. As of the date of preparation of this report, the data necessary to inform this indicator for the year 2021 are not available.
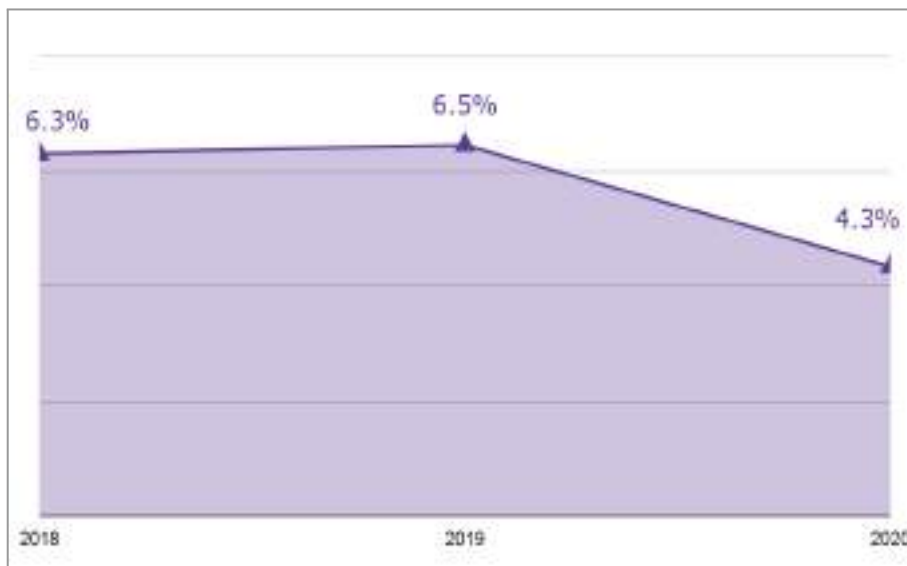
Graphic 17: Percent representation of TCA in GGP, 2018-2021.
Source: DGIMO-ENTUR based on the MDEP-GCBA.

5.3.3. Number of hotels and para-hotels in the city

During the first quarter of 2020, there were 527 hotels and para-hotels establishments in the city (the annual average was 132 establishments as a result of the closure during most of the year due to the pandemic). During 2021, despite the progressive reopening of the sector, the annual average number of hotel and para-hotel establishments was 263 (52% less than the 2019 average).

Given the fact that 3, 4 and 5 stars hotels represent a high proportion of the vacancies offered, and that they were the accommodation categories with the fastest reaction to

the post-pandemic reopening, the specific evolution of these establishments is shown, which fell from 173 on average in 2019 to 104 in 2021 (-40%).

To facilitate the monitoring of the reopening of the hotel supply within this segment, the observatory developed a dashboard with monthly updates, with the geolocation of 3, 4 and 5 stars hotels opened in the city and their occupancy rate, among other data.
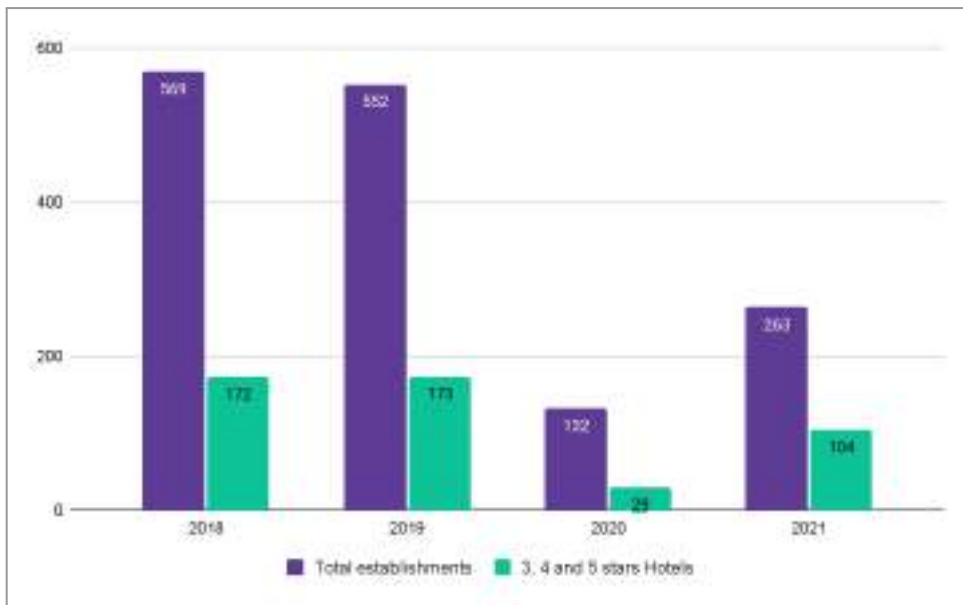
Graphic 18: Evolution of total establishments in the CABA, 2018-2021.
Source: DGIMO-ENTUR based on EOH.
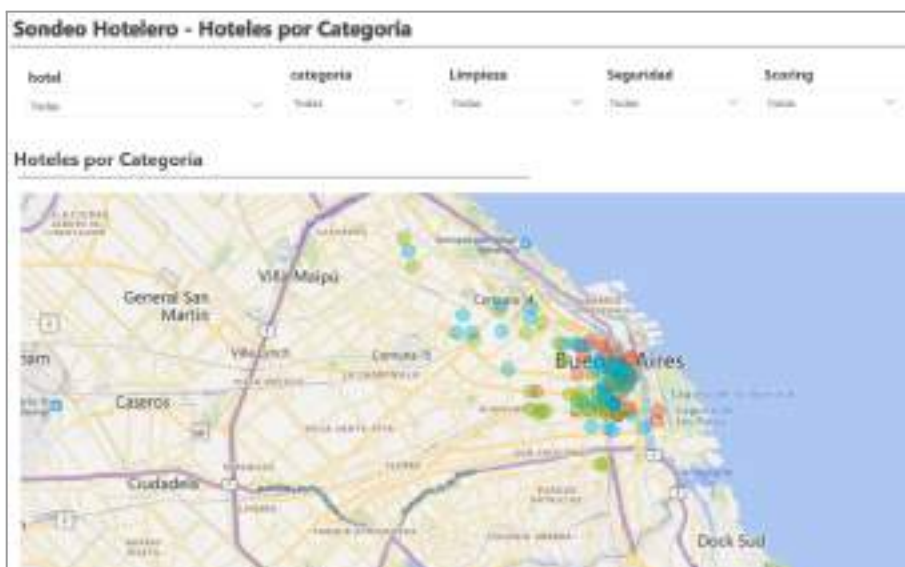
Figure 16: Dashboard with geolocation of 3, 4 and 5 stars hotels in the CABA.

5.3.4. Hotel occupancy rate

Hotel occupancy in the city during the period under analysis is conditioned by the restrictions resulting from the pandemic. Occupancy for the year 2020 corresponds to data from the first quarter. During the year 2021, new restrictions were implemented in April and May that affected occupancy. The final recovery begins in July 2021, which is why the occupancy rate for that year is low.

In December 2021, a time when the activity was already showing signs of recovery, the occupancy rate in hotels in the city was 42% (27% less compared to the same month in 2019).
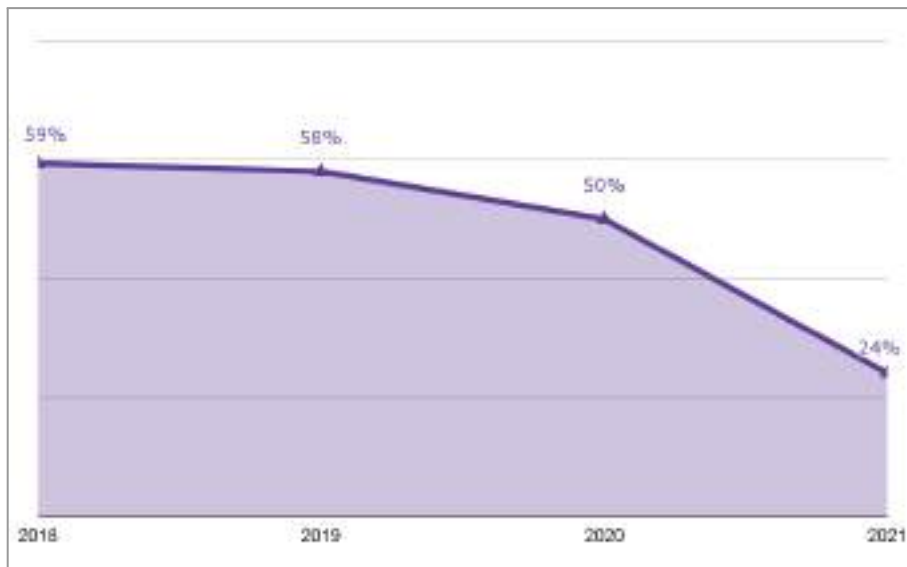
Graphic 19: Evolution of occupancy percentage in accommodations in the CABA, 2018-2021.
Source: DGIMO-ENTUR based on EOH data.

5.3.5. Total number of tourists

As previously explained, from late March to September 2020, pandemic restrictions affected tourist arrivals to the city. The recovery starts in the fourth quarter of 2020, with a decrease between April and June 2021 due to the second wave of Covid 19 in the country. During the year 2021, the recovery pace was greater for domestic tourism, as international tourists arrivals were conditioned by pandemic restrictions.
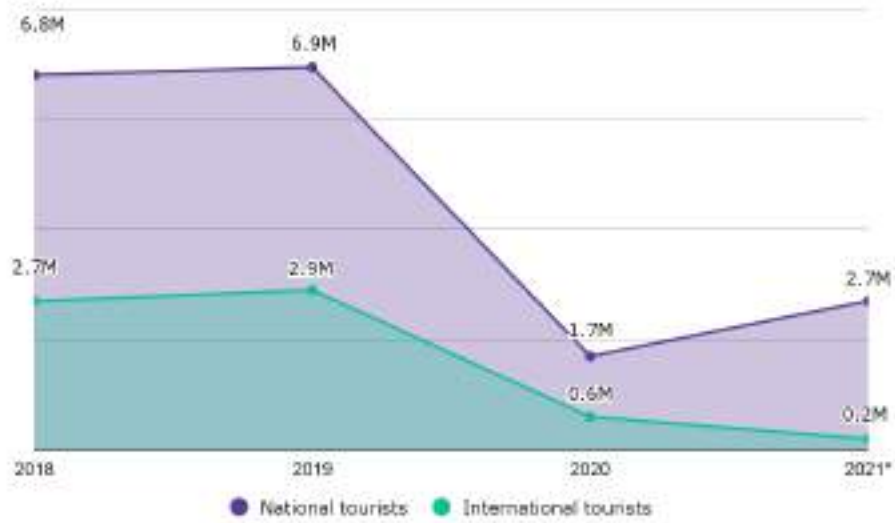
Graphic 20: Total national and international tourists in the CABA (in millions), 2018-2021.

Source: DGIMO-ENTUR based on EOH, ETI, and EVyTH data. *2021 provisional data.

6. Environmental Dimension

6.1. Energy, water & waste management

The Environmental dimension is key to the sustainability of tourism in a destination, but its measurement in the city is complex because the available data do not allow the isolation of the impact of tourism activity in particular.

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 (national level) 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.

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, 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 policies to reduce generated waste.

In addition, by 2022, specific questions will be included in the Hotel Occupancy Survey conducted during long weekends in the city, aimed at finding out whether hotels separate waste and whether they promote water and energy conservation among their guests. These results will be presented in the 2022 report.

For this reason, the number of tourism providers certified in the "Environmental Management Guidelines for Tourism Organizations" program is used as an indicator for this dimension. In addition, information is provided on other programs and certifications carried out by the Government of the City with an impact on the tourism industry.

6.2. Number of distinguished providers in the "Environmental Management Guidelines for Tourism Providers" program

The National Directorate of Tourism Quality and Innovation of the Ministry of Tourism and Sport of the Nation promotes the Environmental Management Guidelines tool, which belongs to the Argentine System of Tourist Quality (SACT). In the City of Buenos Aires, the Buenos Aires Tourism Board is in charge of its implementation.

The objective is to guide the tourism organizations towards the implementation of good practices capable of guaranteeing environmental quality while, at the same time, favoring its economic performance.

Figure 17: Insignia of the seal granted by the Environmental Management Guidelines program-MTyD.

Figure 18: Environmental Management Guidelines for Tourism Providers-MTyD.

The program is aimed at tourism organizations from different sectors, such as lodging, gastronomy, travel companies, tourist transportation, and museums, among others. The benefits for the organizations that participate in the program are the optimization and reduction of costs, the implementation of technological and process innovations, systematic progress towards sustainability, improvement of the image of responsible tourist, orientation of their actions against climate change and contribution to the environmental quality of the destination.

The Environmental Management Guidelines are made up of 34 guidelines, grouped into 9 central themes:

- Theme 1: Sustainable organization concept
- Theme 2: Energy management
- Theme 3: Water management
- Theme 4: Waste management
- Theme 5: Natural and Cultural Heritage
- Theme 6: Carbon Footprint
- Theme 7: Work environment and equipment
- Theme 8: Community, customers and suppliers
- Theme 9: Planning and continuous improvement

Its implementation has been conceived and designed according to the continuous improvement approach, a concept that is understood as an uninterrupted cycle composed of the following phases:

- A study of the current situation is carried out, from which an area for improvement is identified.
- Improvement actions are planned and implemented to achieve the desired situation.
- The results are verified and acted upon, either to correct deviations or to propose another more challenging and ambitious goal.

The purpose of these guidelines is to make organizations generate improvements in their processes and the application of best practices, from which it is possible to achieve distinction in this program.

Since its implementation in 2015, 62 tourism providers in the city have obtained the distinction in environmental management, whose evolution is presented in the graph below. The program was suspended during the pandemic (2020-2021) and it was reactivated during the year 2022, the results of which will be presented in the next report.
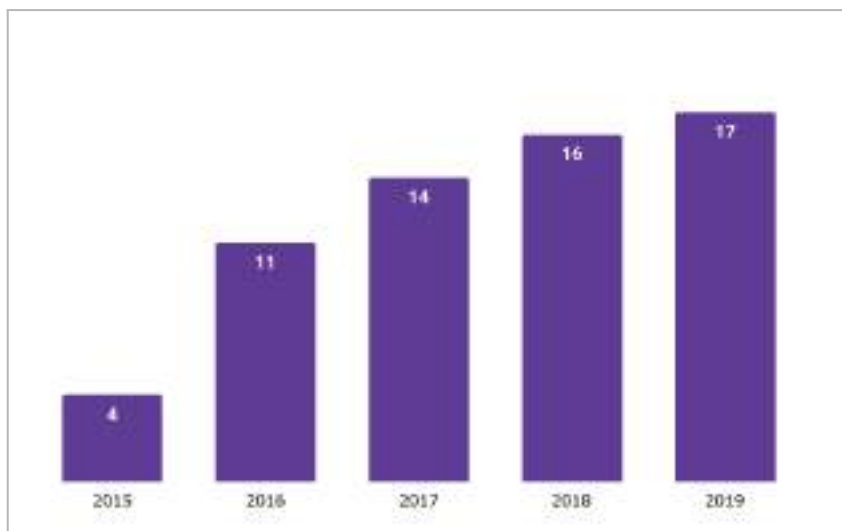
Graphic 21: Evolution of distinguished tourist providers in environmental management, 2015-2021.
Source: ENTUR.

6.3. Other sustainable development programs promoted by the City Government with an impact on the tourism sector

Ecosellos

This proposal is aimed at establishments engaged in administrative, productive, and public and private service activities located in the City of Buenos Aires. The program promotes:

- The adoption of processes and technology that efficiently harmonize economic and social growth with environmental protection.
- Integral environmental management within public and private establishments.

The establishments are distinguished with **Ecosellos**, which recognize their commitment to environmental care and the promotion of sustainable development, awarded after meeting the goals and actions in each working area.

The working areas are the following:

- ➢ Water: the objective is to advance in the rational and efficient use of water, which in turn, allows savings in consumption and improves the quality of effluents.

Figure 19: Insignia of the seal granted by the Ecosellos program-GCBA.

- ➢ Energy: the objective is to achieve the rational and efficient use of energy, which allows savings in consumption and in electricity and gas billing.

Figure 20: Insignia of the seal granted by the Ecosellos program-GCBA.

➢ Waste: it aims to ensure proper waste management. It boosts savings in costs associated with waste disposal, improves order and cleanliness and, in turn, complies with current regulations.

Figure 21: Insignia of the seal granted by the Ecosellos program-GCBA.

➢ Inputs: it promotes the efficient use of raw materials and inputs, and, in addition, the reduction of environmental impact. By applying these changes, cost savings and safety improvements in the storage and handling of inputs are achieved.

Figure 22: Insignia of the seal granted by the Ecosellos program-GCBA.

➢ Environmental Management: its objective is to incorporate and improve environmental management, to assimilate an environmental management culture and to facilitate the control and monitoring of environmental aspects and impacts.

Figure 23: Insignia of the seal granted by the Ecosellos program-GCBA.

The establishments that obtain all the Ecosellos of the different areas mentioned above obtain the **Sustainability Ecosello.**

Figure 24: Insignia of the seal granted by the Ecosellos program-GCBA.

At the time of closing this report, **14 tourism providers** in the city had participated in one of the aforementioned Ecosellos (6 in 2019, 6 in 2020 and 2 in 2021.).

Ecoinsignia

The **Ecoinsignia** is an emblem that recognizes the level of commitment to sustainable development achieved by member establishments, through the accreditation and qualification of a series of predefined requirements in different areas. The purpose of this recognition is to positively differentiate the establishments which actions, configuration and operation are more respectful of the environment.

Each evaluation area represents a strategic objective under which the requirements to be accredited to obtain the Ecoinsignia are grouped:

- **Water:** optimization and rational use of water, rainwater recovery, among others.
- **Energy:** energy efficiency criteria, rational energy use practices, implementation of renewable energy systems, among others.
- **Waste:** promotion of reuse and recycling, reduction of waste generation and sustainable waste management, composting, minimization and mitigation of the pollutant load in atmospheric emissions and liquid effluents, among others.
- **Inputs:** optimization of the use of raw materials, storage and handling of materials, rational use of paper, sustainable purchasing, etc.
- **Environmental Management:** implementation of environmental management systems, control and monitoring systems, improvements in order and cleanliness, good manufacturing practices, circular economy, etc.

The Ecoinsignia can be awarded according to one of the following three levels: i) Initial, ii) Intermediate, and iii) Advanced. Each of these levels represents the degree of commitment to sustainable development by the participating establishment. The number of requirements to be met per level is incremental, and proportional to the effort and commitment shown towards environmental sustainable development.

Figure 25: Insignias of the seal granted by the Ecoinsignia program-GCBA.

Since in order to obtain the Ecoinsignia, tourism establishments must comply with a series of predefined requirements, in the future we will be able to obtain two indicators: the number of tourism providers that obtained the seal and the level of commitment: initial, intermediate or advanced.

7. Social Dimension

7.1. Accessibility

7.1.1. Number of distinguished providers in the "Accessibility Guidelines" program

From the Buenos Aires Tourism Board, the program called "Distinguished" is carried out to encourage tourism organizations to make improvements in order to comply with guidelines aimed at guaranteeing tourism accessibility, according to the Guide of Accessibility Guidelines proposed by the Ministry of Tourism and Sport of the Nation. When the guidelines are complied with and the goals are achieved, tourism providers are granted an "Accessibility Seal" to recognize that the service provided considers the inclusion of people with disabilities.


Figure 26: Guide of Accessibility Guidelines for tourist services-MTyD.

Figure 27: Self-assessment Guide of Accessibility Guidelines in tourist services-MTyD.

Between 2015 and 2019, 48 tourism providers received the seal of distinction on "Accessibility Guidelines" in the city. During the years 2020 and 2021, the program was not executed due to the pandemic and it was resumed in 2022, with 14 participating organizations until the closing of this report.
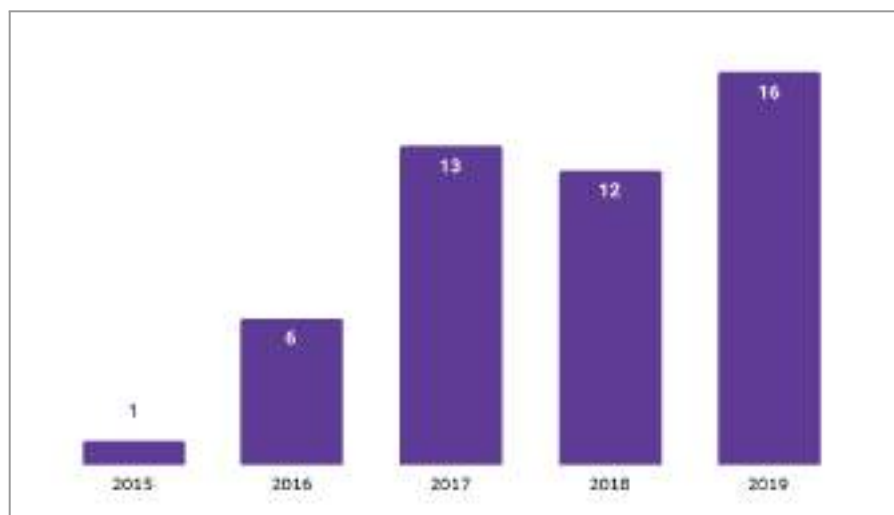
Graphic 22: Evolution of distinguished tourism providers in accessibility, 2015-2021.
Source: ENTUR.

7.1.2. People with disabilities in the travel group

During 2019, a question was included in the quantitative studies performed by the Tourism Observatory to record the incidence of people with any disability in the travel group of those who visit the city. The question is: *Is there any person with disability in your travel group?* If the answer is *Yes*, the type of disability is then asked: visual, motor, mental or hearing. This question is asked in surveys of cruise tourists, MICE events and Tourist Attention Centers of the City. Given the fact that since March 2020 these primary data collection operations have been suspended, we do not have data as from such date, thus, added results for the year 2019 and the first quarter of 2020 are shown. We expect to have an evolution of such data for the year 2022 in order to be able to monitor the evolution.
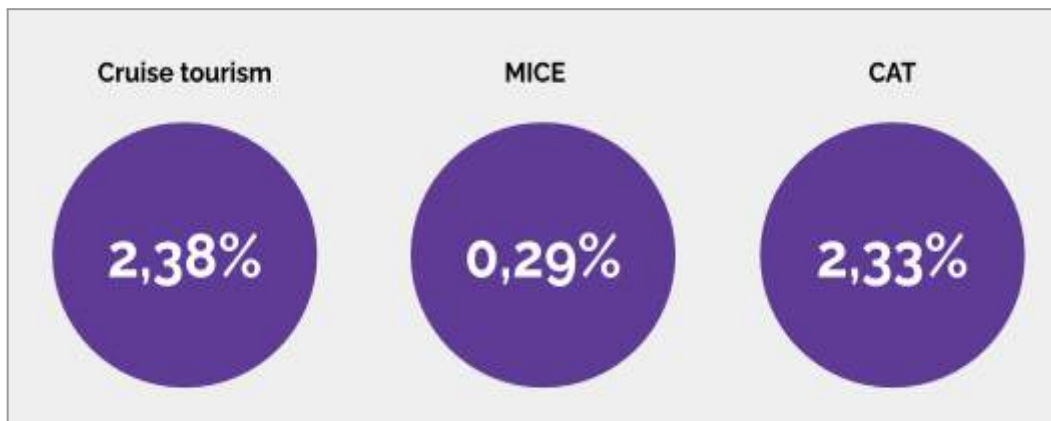
Figure 28: People with disabilities in the travel group. Sources: CAT (2019-Q1 2020), Cruise Tourism Survey (season '19-'20) and MICE Survey (2019) - DGIMO-ENTUR.

Among the cruise passengers arriving during the 2019-20 season, 2.38% declared having at least one person with disability in their travel group, while among the tourists at MICE events in 2019, this percentage was 0.29%. Among the visitors surveyed in Tourist Attention Centers during 2019 and the first quarter of 2020, 2.33% asserted to have at least one person with disability in their travel group.

7.1.3. Other accessibility-oriented actions in the city's tourism

Accessible Tourism Guide

The Tourism Board of the city together with COPIDIS –Commission for the Full Participation and Inclusion of Persons with Disabilities– developed the Accessible Tourism Guide, which contains information on the accessibility of different tourist attractions in the city. The guide identifies, through icons, the status of establishments concerning the possession of elements that enable the inclusion of people with different disabilities.

Figure 29: Copies of the Accessible Tourism Guide-COPIDIS.
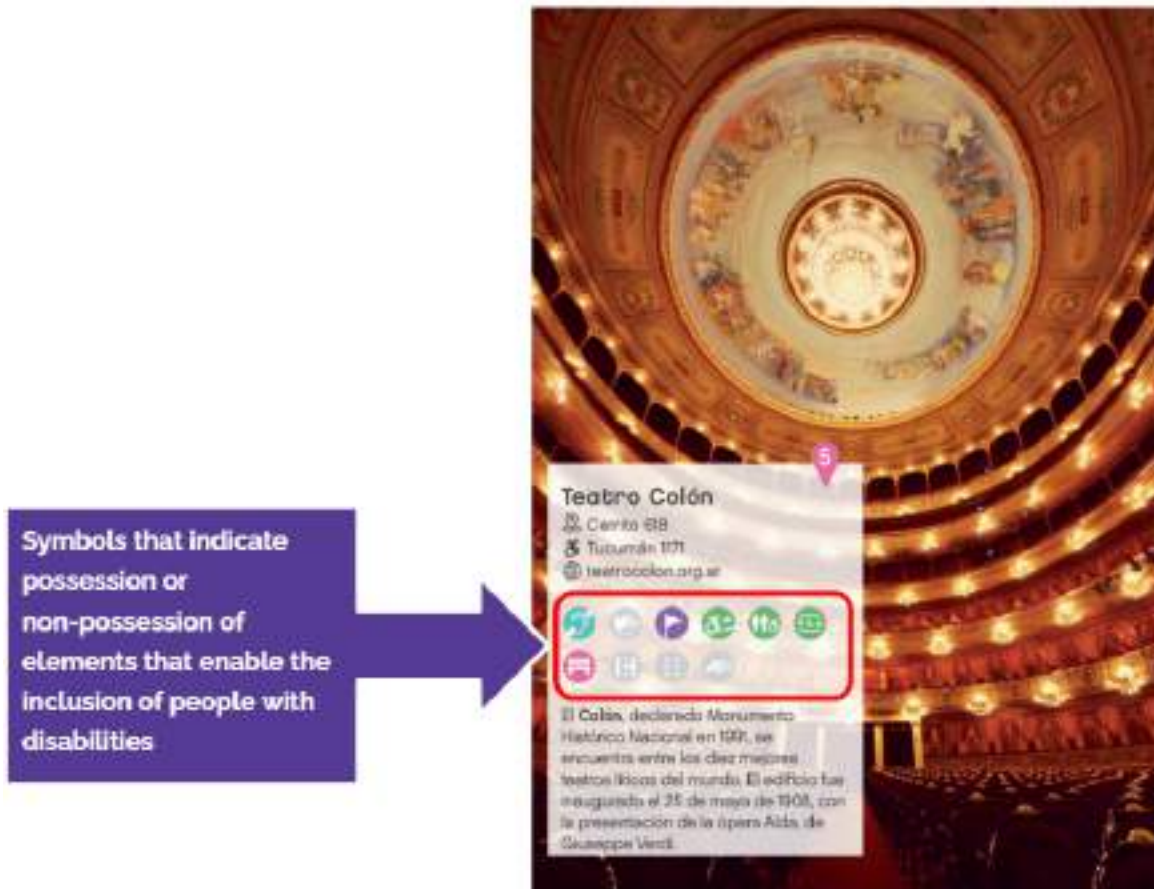
Figure 30: Accessible Tourism Guide-COPIDIS.

Interactive accessibility places map

Through the web page of the Government of the City of Buenos Aires, an interactive map is available where people can verify the accessibility conditions of gastronomic establishments in the City of Buenos Aires. The map indicates with colours the number of features complied by establishments concerning accessibility: accessible access, accessible toilet and/or Braille menu.

Figure 31: Interactive accessibility places map-GCBA.

7.2. Local satisfaction concerning tourism

7.2.1. Tourism intensity

In order to guarantee the sustainability of tourism in the city, it is relevant to monitor that the tourist activity does not affect the local population in their daily lives. Currently, the City of Buenos Aires does not have difficulties related to "over-tourism", as can be seen in the tourism intensity index in the graphic shown below.

Graphic 23: Number of non-resident visitors over total population in the CABA, 2018-2021.
Source: DGIMO-ENTUR based on EOH, ETI, EVyTH and National Population Census.

To calculate this indicator, the CEPAL (2006) methodological proposal is taken as a reference, based on the calculation of the ratio between the total number of tourists and the number of residents in the city. In 2018 and 2019, the tourist intensity index was similar: 3.1 and 3.2 tourists, respectively, for each inhabitant over the course of a year. Thus, we confirm that the city does not present difficulties related to "over-tourism".
As expected, the intensity index is lower in 2020 and 2021, due to the restrictions of the pandemic.

Tourist Movement

In order to know the areas through which visitors move during their stay in the city, a movement analysis is made from Big Data sources, mainly mobile phone data. The information is presented in heat maps, which allow to identify the areas through which visitors move on different days of the week and time ranges.
This information enables decision-making concerning the distribution of tourist flows towards less visited neighbourhoods of the city, and the monitoring of potential areas

with a high flow of visitors, with the consequent negative impact on the residents of the city. The data is published on dashboards of the web site of the Observatory.

As a consequence of the pandemic, during the years 2020 and 2021, no information on tourist movement was obtained, but during the year 2022, the acquisition of data was managed again. Thus, we will have updated maps to be presented in the next report.

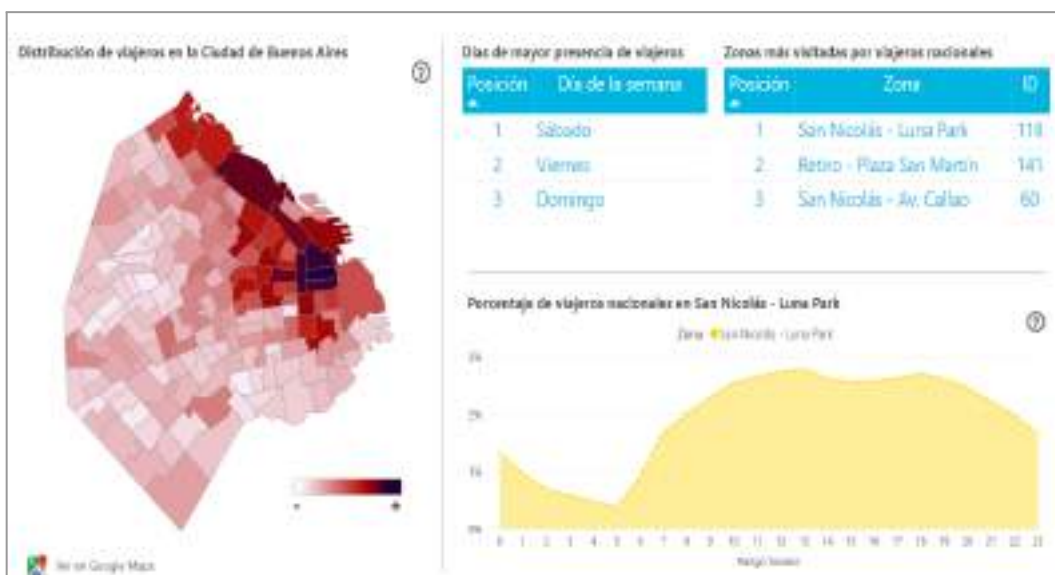**Figure 32: International tourist movement dashboard- DGIMO-ENTUR.**

Figure 33: National tourist movement dashboard- DGIMO-ENTUR.

7.2.2. Resident satisfaction with tourism

Qualitative studies with city residents

Since it is essential for the sustainable development of tourism in the city to understand the local residents' perception of tourism impact in the city in general, and in their neighborhoods in particular, the Tourism Observatory carried out three research projects during 2020 and 2021 with residents of different neighborhoods in the city:

The tourist experience in the City of Buenos Aires. The perspective of residents after COVID-19

During 2021, a qualitative research was conducted to understand the perceptions of neighbours from the main tourist neighborhoods of the city (Recoleta, Palermo, San Telmo, La Boca) regarding the return of the tourist activity to their neighborhoods post Covid, and in order to detect the main fears and barriers. 18 focus groups were held and 2 complementary in-depth interviews were carried out among the residents of the mentioned neighborhoods.

Figure 34: San Telmo, Palermo, Recoleta and La Boca neighborhoods- DGIMO-ENTUR.
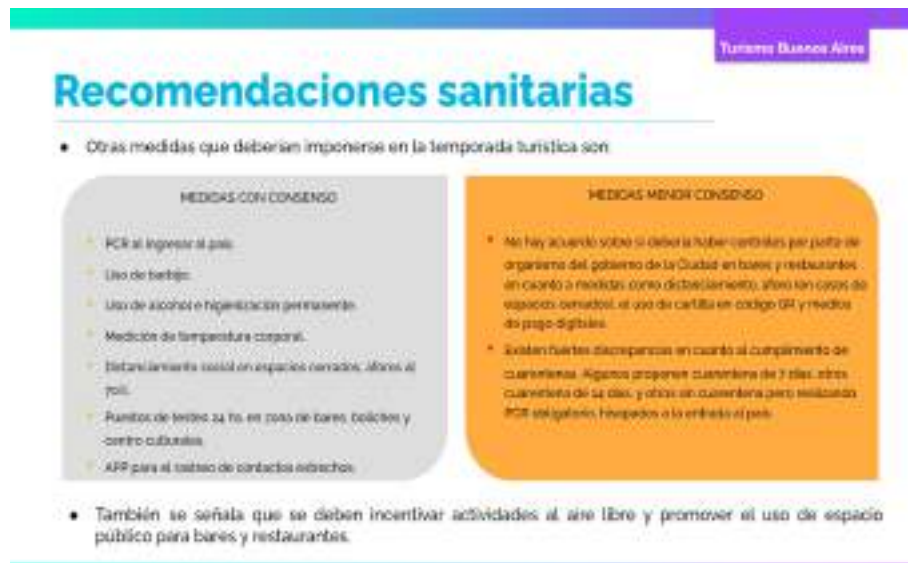
Figure 35: Opinion of residents on the return of Tourism post Covid to their neighborhoods- DGIMO-ENTUR.

Permeability for tourist development in popular neighborhoods of the city

The Buenos Aires Tourism Board has a program that seeks to promote tourist development in popular neighborhoods of the city. In order to provide support to the design of such program, qualitative researches were conducted from the Tourism Observatory in 2021 with residents in two of the popular neighborhoods identified as potential neighborhoods for the development of the program –the Rodrigo Bueno and Mujica neighborhoods– to assess the perception and permeability of neighbors concerning the development of the tourist activity in the city.

The specific goals of these studies were:

- To explore the identity of the neighbourhood from the perspective of neighbors.
- To assess the perceptions of neighbours regarding the development of the tourist activity in the neighbourhood: predisposition so that tourists may visit the neighborhood, main related advantages and disadvantages, concerns related to the visit.
- To identify potential tourist attractions in the neighborhood.

Rodrigo Bueno Neighbourhood:

As regards Rodrigo Bueno neighborhood, the in-depth interview technique was used and the samples were segmented according to the potential link with the tourist activity, age and seniority in the neighborhood of those interviewed.
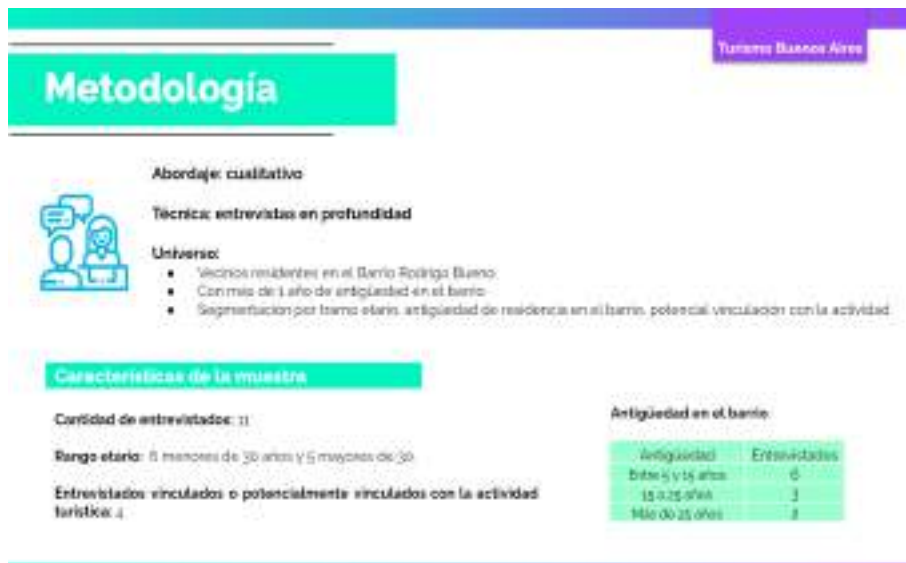

Figure 36: Design of the qualitative study with neighbours of the Rodrigo Bueno neighbourhood-DGIMO-ENTUR.

-
Figure 37: Rodrigo Bueno neighborhood- DGIMO-ENTUR.

Figure 38: Perceptions of residents on Tourism in the Rodrigo Bueno neighborhood- DGIMO-ENTUR.

Figure 39: Perceptions of residents on Tourism in the Rodrigo Bueno neighborhood- DGIMO-ENTUR.

Regarding the perceptions of residents on the tourist activity in the neighborhood, positive perceptions arose, such as the economic contribution, the job creation, the opportunity to show the "progress of the neighborhood" and to generate a greater integration of the neighborhood in the city, the overcoming of prejudices and a prioritization of public management which translates into improvements of the public space. Concerning the negative aspects, the fear of stigmatization and the concern that tourists may think the neighborhood is a dangerous place were pointed out.

Mujica Neighborhood (Former 31 Neighborhood):

The Mujica neighborhood is located in the area of Retiro; it has a large extension and an estimated population of more than 40,000 inhabitants. In order to conduct the qualitative study with the residents of this neighborhood, a mixed approach was used, with focus groups and in-depth interviews. Samples were segmented according to the potential link with the tourist activity, age and seniority in the neighborhood.

Figure 40: Padre Mujica neighborhood- DGIMO-ENTUR.

Figure 41: Design of the qualitative study with neighbors of the Barrio Mujica neighborhood-DGIMO-ENTUR.

Regarding the perceptions of neighbors on the tourist activity in the neighborhood, the economic contribution, the visibility before the public management and the opportunity to offset stigmatization are highlighted as positive aspects. Tourism is considered as a way of opening and integration towards the rest of the city and there is enthusiasm shown for the experience of cultural exchange that may arise from the visits. As for fears, the concern related to a possible exoticizing and spectacularized "view" of the neighbors from the tourists is highlighted.

8. Destination Management Dimension

8.1. Tourist satisfaction

8.1.1. Tourists' level of satisfaction

To estimate international visitors' satisfaction with city services, we use the International Tourism Survey. Due to the pandemic, this survey was suspended from March 2020 and for a large part of the year 2021. Thus, we do not have the results of this last year, yet. The results of 2019 are shown by way of example, year when the services of the city are highly rated by international visitors in general, giving lower scores to hygiene versus other areas of service, with a greater proportion of tourists giving it the lowest scores (1 and 2) and a lower proportion of tourists giving it the highest score (5).
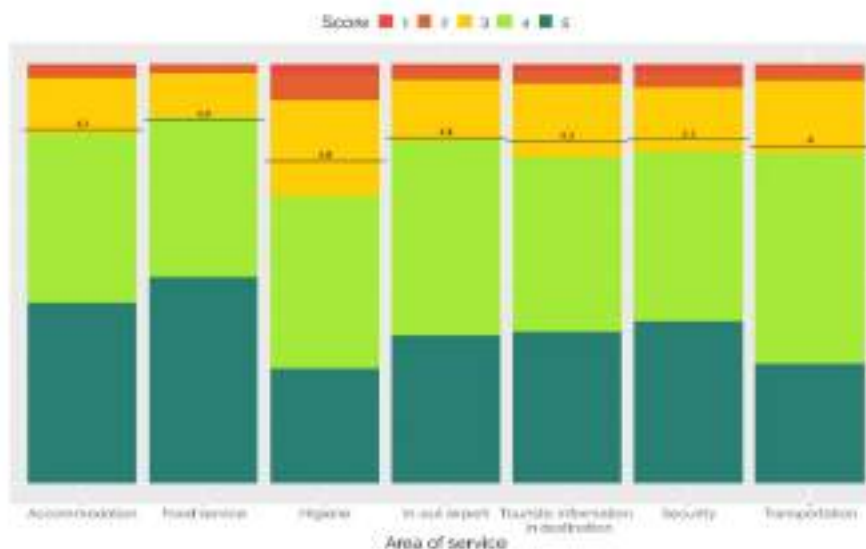
Graphic 24: Rating of international tourists on different aspects of the city, 2019.
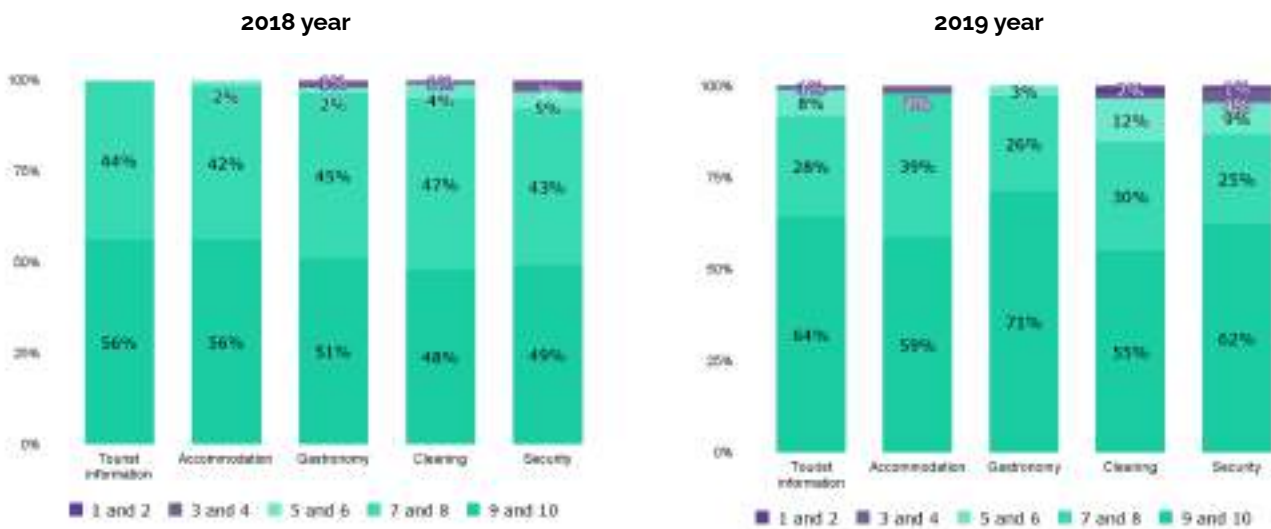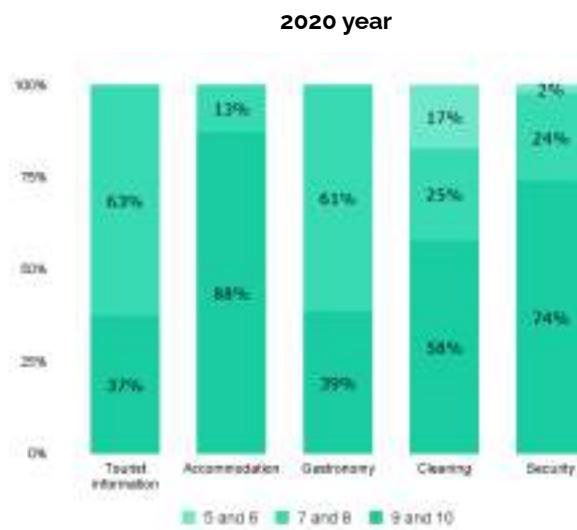**Source: DGIMO-ENTUR based on ETI data.**

In order to calculate the satisfaction of national visitors concerning their tourist experience in the city, we use the Household Travel and Tourism Survey (EVyTH), developed by the Ministry of Tourism and Sport of the Nation, where visitors are asked to provide their rating on a scale of 1 to 10 points. The city obtains a high level of satisfaction concerning the tourist experience of national visitors, which is maintained over the years.
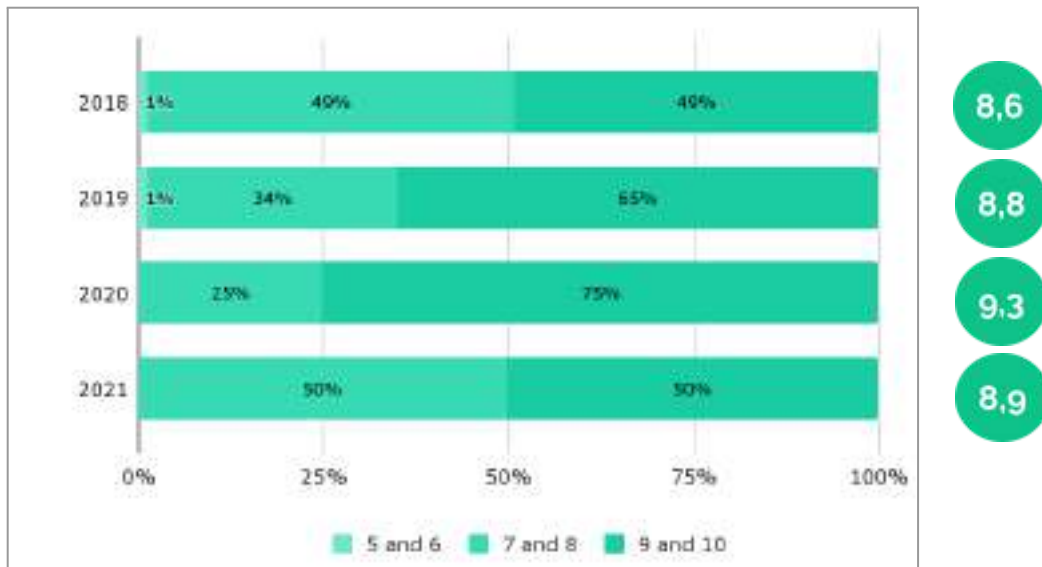
Graphic 25: Satisfaction of national tourists in general concerning the CABA, 2018-2021.
Source: DGIMO-ENTUR based on EVyTH data.

2018 year

2019 year

2020 year

**Graphic 26: Satisfaction of nacional tourists with aspects of the CABA, 2018-2020.**
Source: DGIMO-ENTUR based on EVyTH data.*2021 data not available.

In addition to this global indicator of visitor satisfaction cited above, the Observatory measures 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 are consulted not only 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 the CABA).

Due to the pandemic, the surveys in MICE events were suspended during 2020 and 2021. Thus, the last measurement belongs to the year 2019. In the case of the cruise segment, surveys were conducted until March 2020.

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

Since the activity in both segments was reactivated during 2022, we will have updated information for the next report.
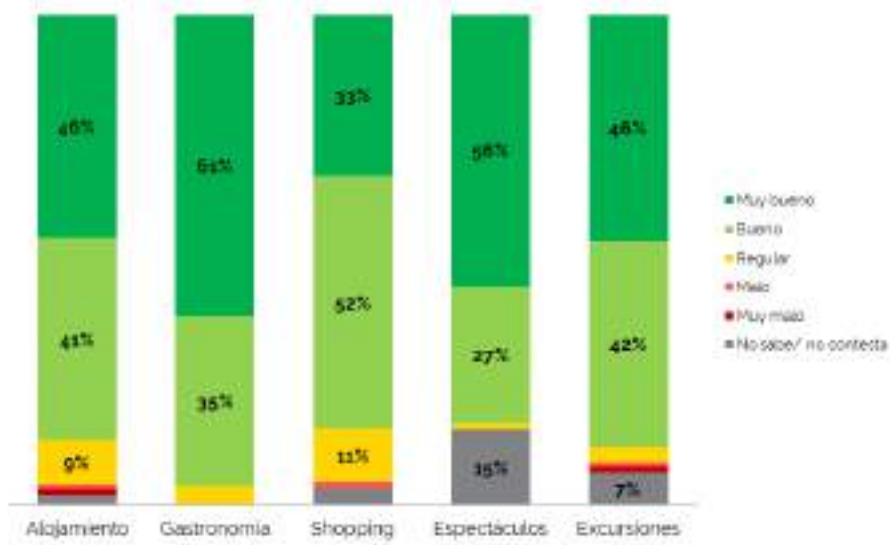
Graphic 27: Score given to the different areas of the city service in the Cruise Tourism Survey during the 2019-2020 cruise season. Source: DGIMO-ENTUR.
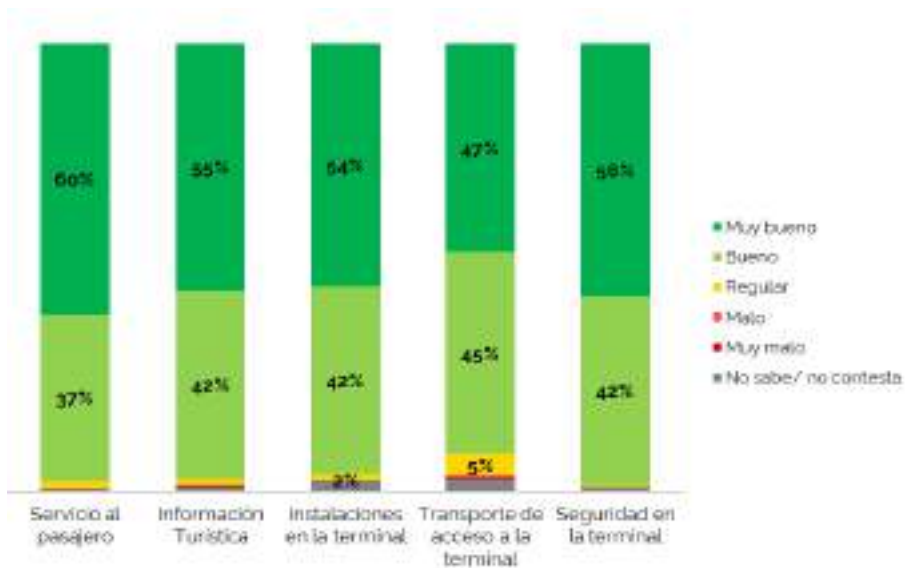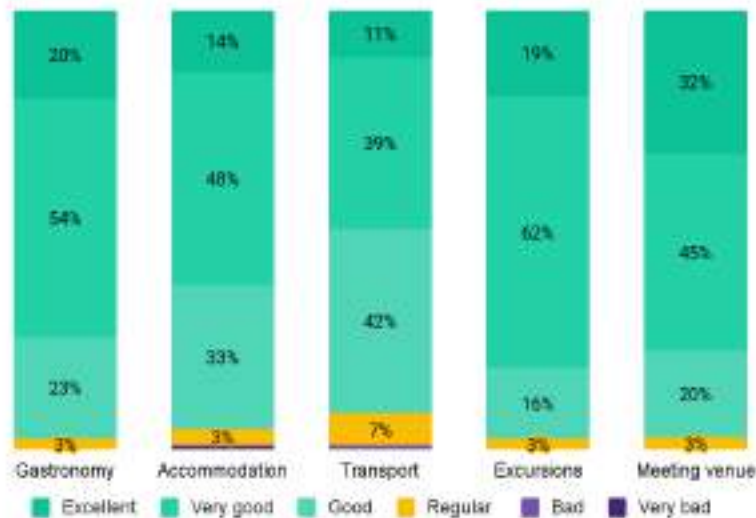

Graphic 28: Score given to the different areas of the cruise terminal service in the Cruise Tourism Survey during the 2019-2020 cruise season. Source: DGIMO-ENTUR.
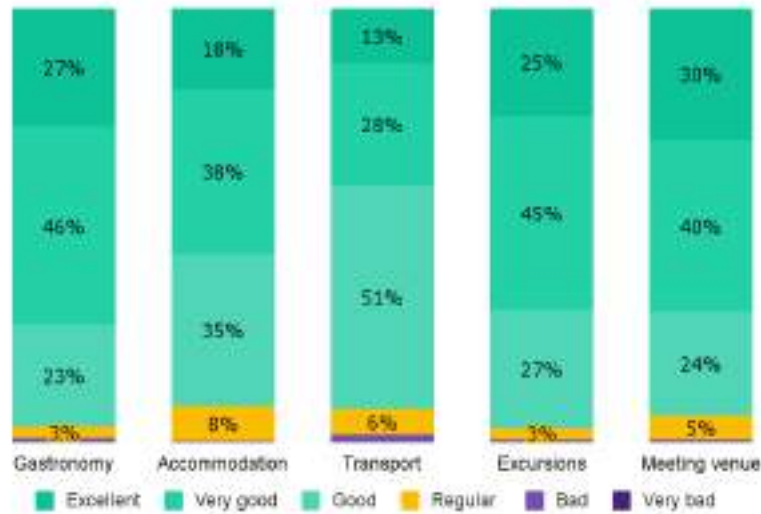
Graphic 29: Qualification of city services by international tourists at MICE events, 2019.
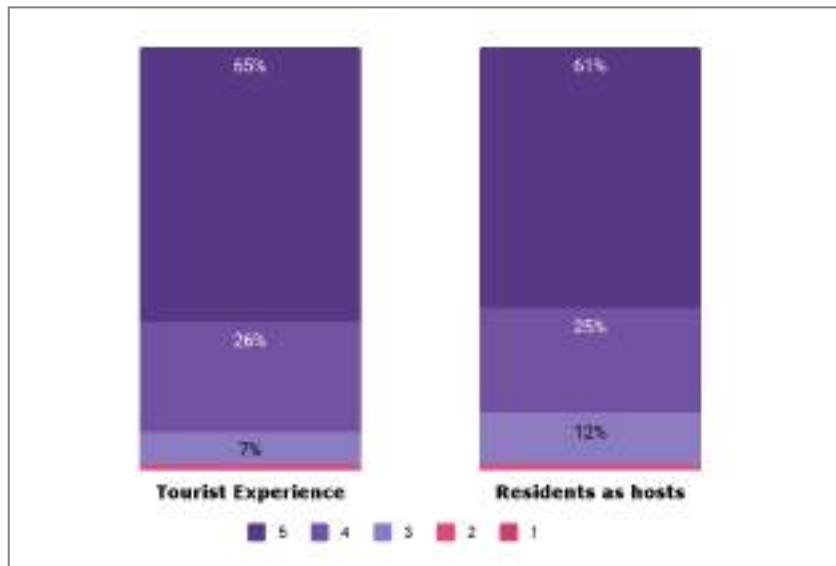**Source: DGIMO-ENTUR.**

Graphic 30: Qualification of city services by national tourists at MICE events, 2019.
Source: DGIMO-ENTUR.

Another important source of information to monitor 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 are 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

such tourist service center. 379 visitor satisfaction surveys were collected in the tourist service centers of the city 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 only two CATs had reopened.

Graphic 31: Score given to the tourism experience and the city citizens as hosts in the Tourist Service Centers Survey. January- March 2020. Source: DGIMO-ENTUR.

8.2. Governance

8.2.1. 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, especially sources that are normally unavailable to government data driven decision making — that is, private sources of information.

During 2020 and 2021, the Observatory used data from three sources of information coming from the private sector:

- ●TRP (Terminales Río de La Plata), movement of cruise ships and passengers at the Quinquela Martín Terminal.
- ● Aeropuertos Argentina 2000, arrivals and departures in local airports.
- ● Hotels of 3, 4 and 5 stars of the city, hotel occupancy during long weekends.

However, and due to the recovery of the tourist activity in the city, during the year 2022 the hiring of databases concerning movement through mobile phones, expenses with credit and debit cards and advanced air reservations will be resumed, which will be recorded for the report of that year.
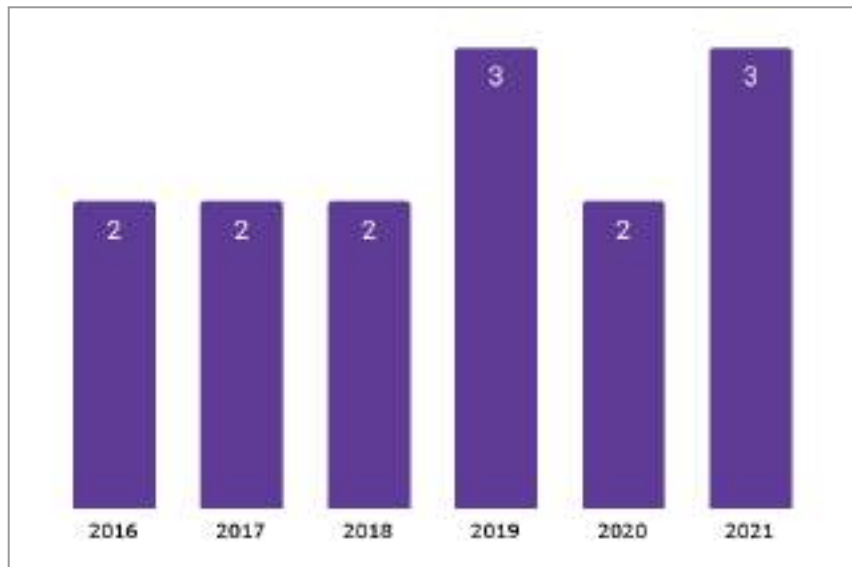
8.2.2. Number of programs linked to sustainability in tourism implemented by the Government of the City of Buenos Aires

In order to contribute to the sustainability of tourism in the destination, it is of vital importance to implement programs and activities aimed at fostering the commitment and development of responsible actions by the actors from the sector. For many years, the Government of the City of Buenos Aires has been developing programs linked to the dimensions of sustainability, which have been implemented in different years:

- In 2016, the programs Environmental Management Guidelines and Accessibility Guidelines were implemented (interrupted in 2020 and 2021).
- In 2019, the *Ecosellos* Program was launched.
- In 2020, the Safe Travels Seal was implemented.
- In 2021, the *Sello Verde* Program was launched.

Figure 42: Logos of programs linked to Sustainability implemented by the GCBA.

Graphic 32: Number of programs implemented by GCBA related to the dimensions of tourism sustainability per year, 2016-2021. Source: DGIMO-ENTUR.

To these already consolidated programs, others will be added to be implemented in 2022, such as Human Talent (Annual Tourism Training Plan), Equality Seal (within the framework of the Argentine Tourism Quality Guidelines) and Ecoinsignia.

8.2.3. Number of activities promoting sustainability in tourism in which the Buenos Aires Tourism Board participated

From the Buenos Aires Tourism Board, initiatives are being conducted to generate spaces for exchange, learning and communication with other public and private actors from the touristic and academic sector. Likewise, the body actively takes part in activities linked to sustainability in tourism, organized by other actors.

For such reason, the number of activities in which the Buenos Aires Tourism Board participates, whether as organizer, assistant or speaker, has been chosen as an indicator due to the fact that such participation enables the creation of beneficial exchanges for the development of actions that favor the sustainability of the activity.
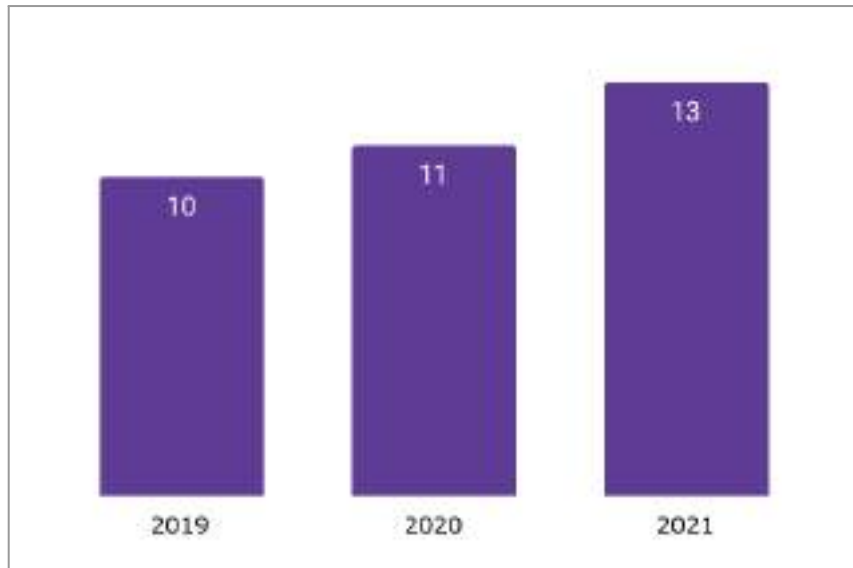
Graphic 33: Number of training activities and promotion of sustainability in Tourism in which the ENTUR participated, 2019-2021. Source: DGIMO-ENTUR.

9. Conclusions

Conclusions

In the years under analysis in this report, the Covid 19 pandemic had a significant impact on tourism activity in the city, which was heavily conditioned by mobility restrictions and border closures.

These restrictions slowed the positive trend in tourist arrivals to the city in the years prior to the pandemic, with the consequent negative impact on the indicators linked to the economic benefits of tourism in the destination, both in terms of the visitor economy and the employment it generates.

Nevertheless, and despite the unfavorable context, it is possible to identify positive signs regarding the resilience of the sector, which is verified in the work developed to adapt the service in accordance with the health safety protocols suggested by international and national tourism authorities, allowing experiences of tourist enjoyment in the city in the context of the pandemic.

The Government of the City of Buenos Aires and the Buenos Aires Tourism Board are working on actions to promote the sustainability of tourism in the city, as evidenced by the activation of various programs that promote inclusion, energy optimization, water resource management and water consumption among tourism providers, defining plans for reduction and savings.

The measurement of specific indicators linked to the mandatory areas of the INSTO Network in relation to the sustainability of tourism in the destination represents an enormous opportunity to provide accurate and relevant information for decision-making on public policies in the city. However, it represents a great challenge due to the lack of information on some of these areas, especially within the environmental dimension.

Within this framework, from the Tourism Observatory of the City of Buenos Aires we reinforce our commitment to maintain and increase the information on key indicators to monitor the sustainability of tourism activity in the city.