

BUENOS AIRES TOURISM OBSERVATORY

INSTO ANNUAL PROGRESS REPORT

Year 2022

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1

Destination Profile



1.1. City description

Buenos Aires City, the capital of the Republic of Argentina, is home to more than 3,000,000 inhabitants. Along with the Metropolitan Area of Buenos Aires, it is the most populated urban area, housing almost 40% of the population. In turn, it concentrates almost half of the economic activity of Argentina.

The identity of the "City of all Argentines" is nourished by its cultural diversity and the different influences of its inhabitants. On average, 37% of those who live in Buenos Aires were born outside the city. In addition, for the eighth time in the last nine years, Buenos Aires was chosen by The Economist as the best city to live in Latin America for its high quality of life, its varied cultural offer, its educational quality, being an open, diverse and sustainable city as well as for the talent of its inhabitants, its greatest asset.

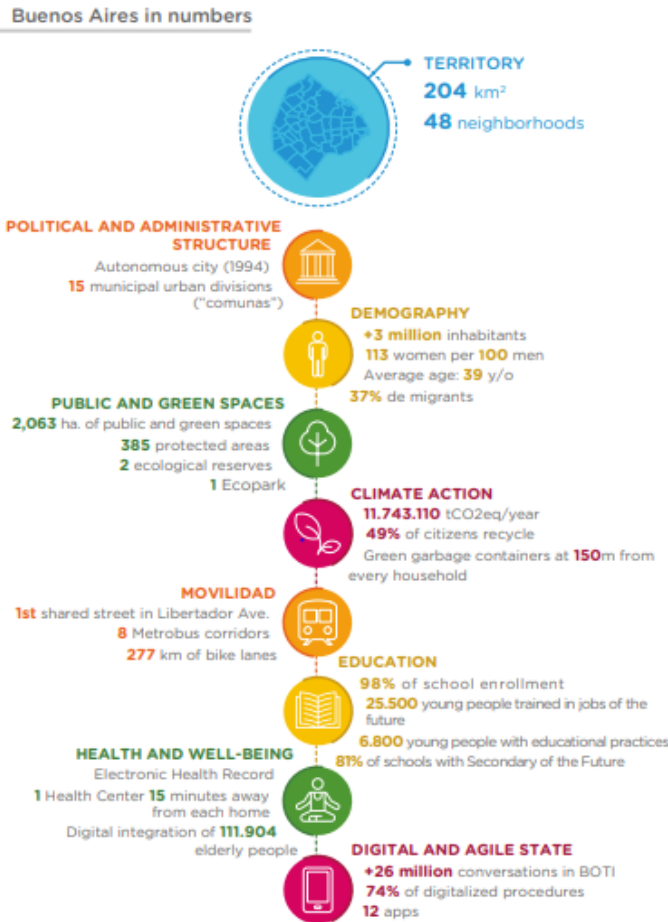


Figure 1: Buenos Aires in numbers.
Source: Buenos Aires IGES Voluntary Local Review, 2022.

1.2. Commitment to the 2030 Sustainable Development Goals

The 2030 Agenda is a master plan that guides the transformation of Buenos Aires City to improve the quality of life of those who live and travel through Buenos Aires.

With less than ten years to achieve the Sustainable Development Goals (SDGs) and in the current context of post-pandemic reconstruction, local transformations to face the great global challenges cannot wait. For this reason, for more than a decade the objective was to transform Buenos Aires into a resilient, inclusive, and sustainable city, based on a plan to continue improving the quality of life for all.

Actually the city government continues advancing with digitization, working on citizen services, always with the aim of being closer to residents, simplifying procedures, and reducing management times. Added to these transformations is a plan to modernise, streamline and make more efficient the way in which citizens and the private sector interact with the State, with safer transactions and generating productive work.



Figure 2: Buenos Aires Sustainable Development Goals Voluntary Local Review 2022

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

Buenos Aires is one of the most visited cities in South America and it is the Number 1 events destination in the Americas according to ICCA (International Congress & Convention Association) Ranking.

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.

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 flavours 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 neighbourhood 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.



Figure 3: Buenos Aires tourism attractions. Buenos Aires Tourism Board.

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 is part of the city's Tourism Board. Its objective is to generate market intelligence to help orientate decision making concerning tourism in the city.

In order to comply with the proposed objective, 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.

Thus, information as regards the different "consumer journey" stages of tourists is gathered by the Observatory in order to describe behaviours 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.).

An aerial photograph of a modern university campus. The central feature is a large, rectangular green lawn with a grid of paved walkways. In the center of the lawn is a large, blue, checkered building. To the left of the lawn is a large parking lot with many cars. To the right of the lawn is a multi-lane road with traffic. The campus is surrounded by trees and greenery. The number '2' is overlaid in the top left corner, flanked by two horizontal lines.

2

— Checklist on INSTO Issue Areas —

CHECKLIST on Issue Areas Monitored			
ISSUE AREA	INDICATOR	SOURCE	STATUS
1. 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
2. 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
3. Destination Economic Benefits	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
	Total number of tourists	Hotel Occupancy Survey (EOH-INDEC) International Tourism Survey (ETI-INDEC) Household Travel and Tourism Survey (EVyTH-MTyD)	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
4. 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
5. 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	Hotel occupancy survey on long weekends	Planned

	sustainability guidelines	(DGIMO-ENTUR-GCBA)	for 2023
6. Waste Water Management			Not available
7. 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
8. Climate Action	Number of hotels participating the program “Sello Huella Calculada”	APRA (agencia de protección ambiental)	Available
9. 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
10. Local Satisfaction	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
11. 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
12. General Destination Performance Criteria	Tourist satisfaction	Household Travel and Tourism Survey (EVyTH-MTyD) Cruise Tourism Survey (DGIMO-ENTUR-GCBA) MICE Tourism Survey (DGIMO-ENTUR-GCBA)	Available

3

Sustainability Indicators Report



3.1. Tourism seasonality

We evaluate tourism seasonality in international travellers' arrivals and national travellers staying in tourism accommodations per month, the total number of tourists staying in hotels per month, the number of passengers transported by air to the city and the number of cruise ship landfalls per month.

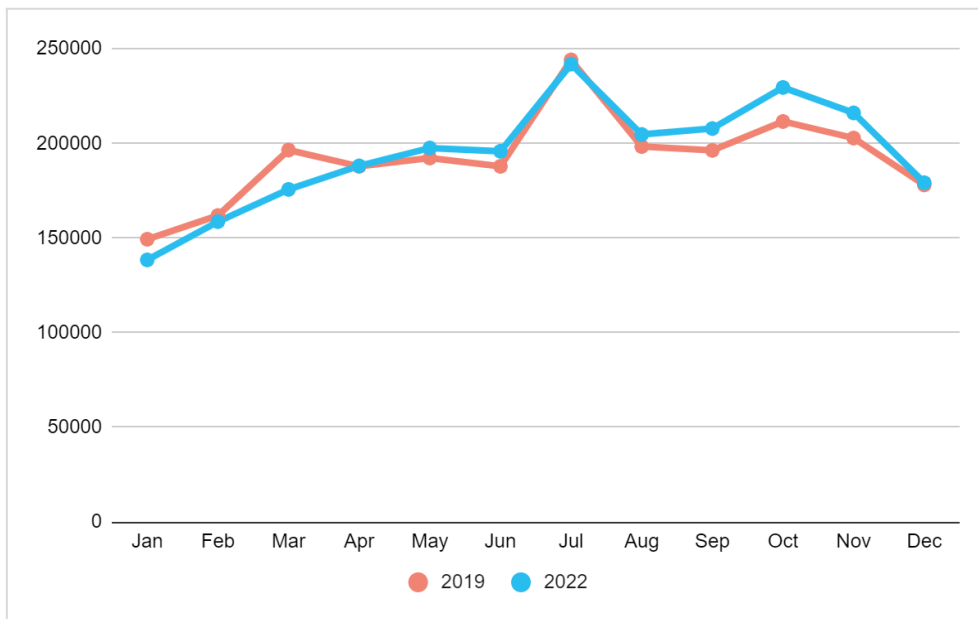
3.1.1. Arrival of national and international tourists per month

We estimate seasonality for national visitors in the city using the monthly Hotel Occupancy Survey (EOH), which provides the necessary granularity.

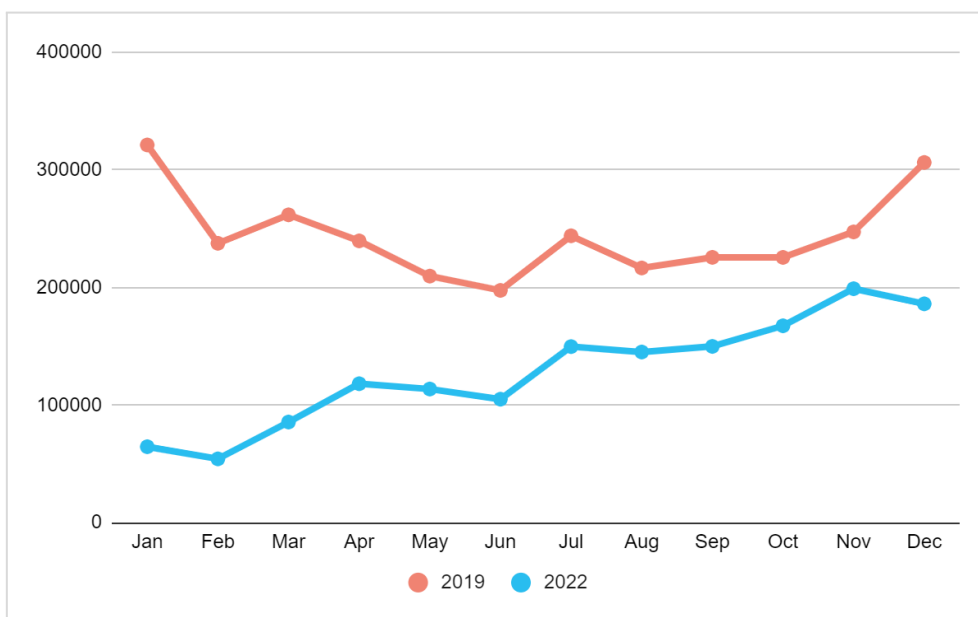
Regarding international visitors, the International Tourism Survey (ETI), developed by the Ministry of Tourism of the Nation jointly with INDEC (National Institute of Statistics and Censuses), is used as a source.

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 historically intensified during the months of December and January, as can be seen in the data for the year 2019. During the year 2022, due to the effects of the post-pandemic recovery, this marked seasonality did not occur.



Graphic 1: National tourists staying in CABA hotels per month, 2019-2022.
Source: DGIMO-ENTUR based on EOH data.

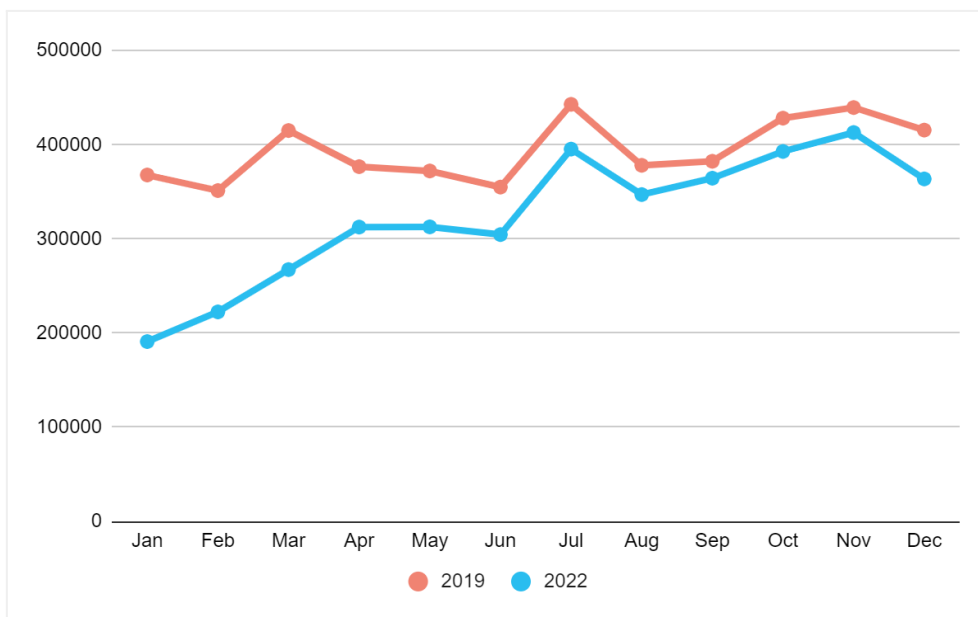


Graphic 2: International tourists admitted to CABA, 2019-2022.
Source: DGIMO-ENTUR based on ETI data.

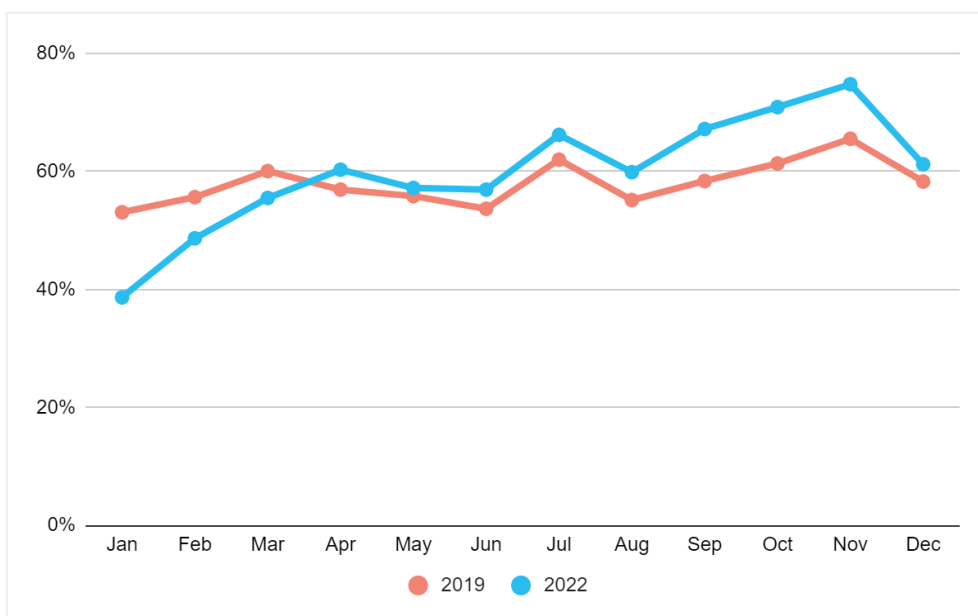
3.1.2. Tourists staying in hotels per month

Another indicator that enables us to monitor seasonality is the total number of tourists staying in hotels per month, which is obtained from the Hotel Occupancy Survey (EOH).

During 2022 the largest number of visitors staying in hotels -and the highest rooms occupancy rates- occurred during the months of **November and July**. Something similar to what happened during 2019. It is also observed how the values are recovering to those reached in 2019.



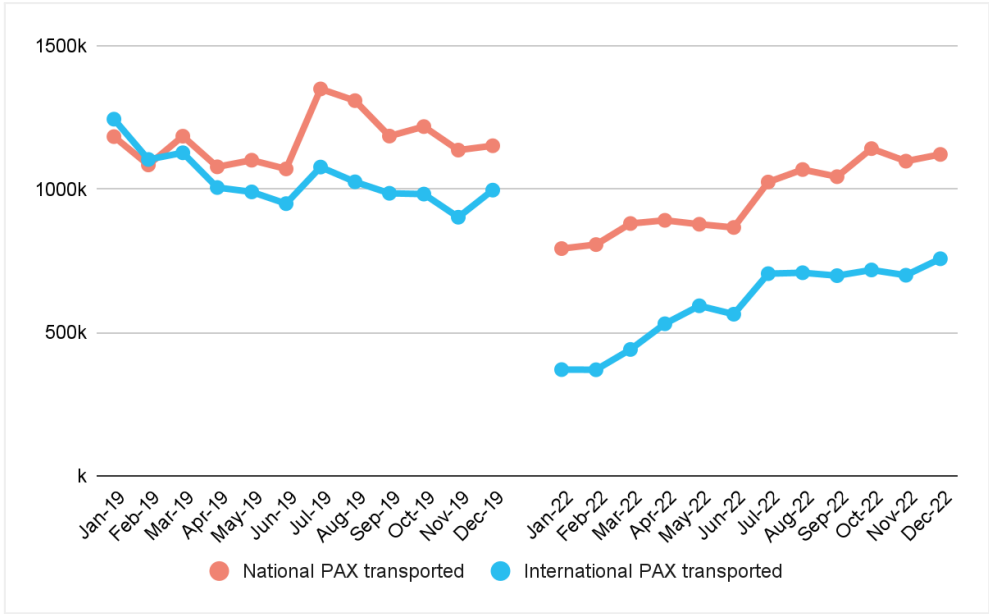
Graphic 3: Total tourists staying in hotels in CABA per month. 2019-2022.
Source: DGIMO-ENTUR based on EOH data.



Graphic 4: Hotel occupancy percentage based on rooms, 2019-2022.
Source: DGIMO-ENTUR based on EOH data.

3.1.3. Passengers transported by air per month

The observatory monitors air activity at airports with an impact on the tourism of the city considering the National Civil Aviation Administration (ANAC) information). For the analysis, the number of passengers transported to the city of Buenos Aires is taken into account. International flights and passengers to the city of Buenos Aires increase during the months of January (and February) during 2019, coinciding with the period of greatest influx of international tourists. Although the flights and passengers of national arrivals, they increase slightly in July and August in 2019, coinciding with the period of winter holidays at the national level. The year 2022 was still a year of recovery in the air market but some signs of the same seasonality as in 2019 can be seen in the graph, especially for domestic flights.

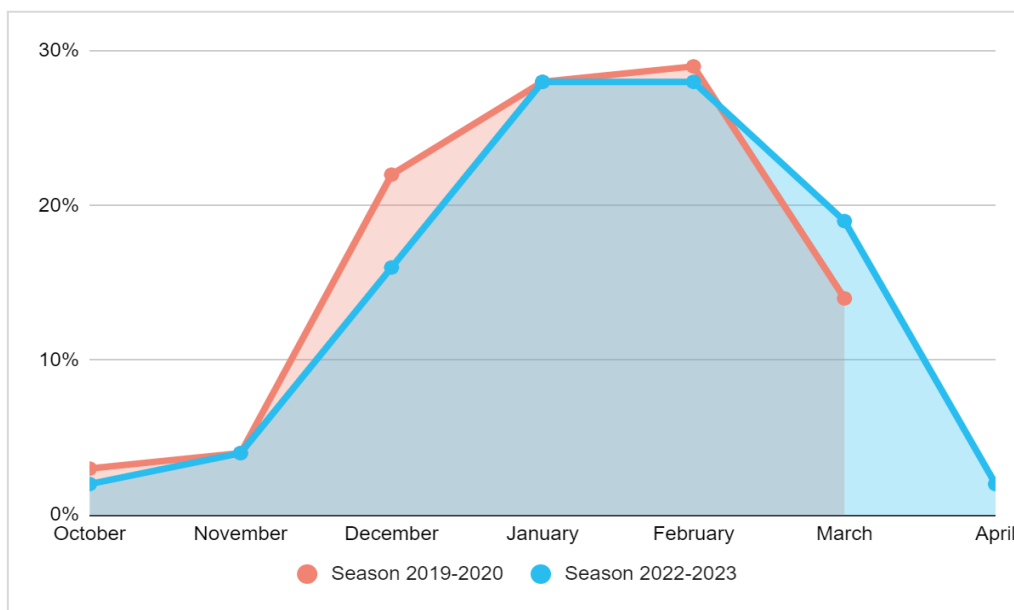


Graphic 5: International and national passengers transported to CABA by air (in thousands). 2019-2022. Source: DGIMO-ENTUR based on ANAC

3.1.4. 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.

The arrival of cruise ships has high seasonality, 90% of landfalls took place during the months of December, January, February and March, period that concentrated more than 90% of the passengers transported during the season 2022-23.

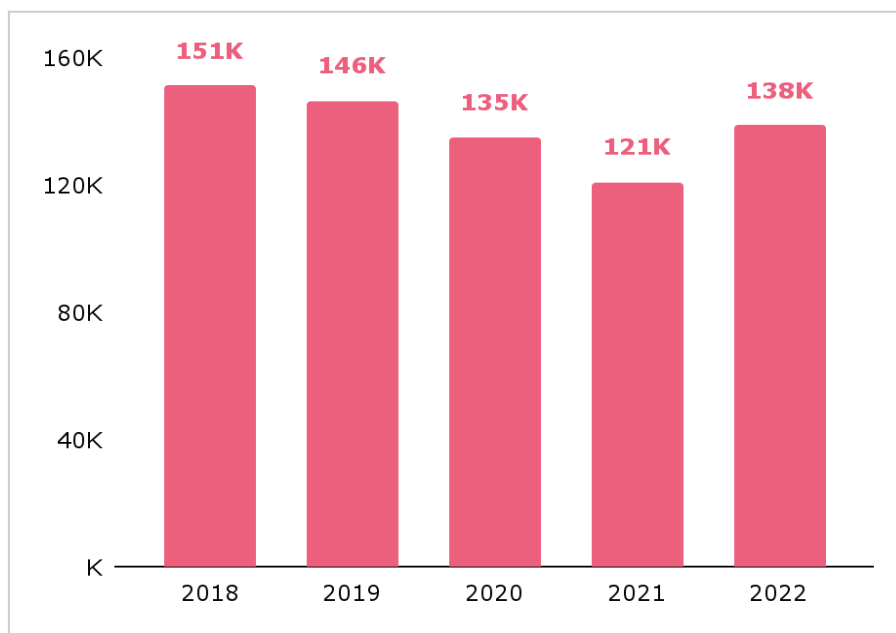


Graphic 6: Percentage of cruise ship landfalls arriving at the port of CABA, 2019-2023.
Source: DGIMO-ENTUR based on TRP data. *2019-2020 season ended on March 15th. due to covid 19

3.2. Employment

3.2.1. Total number of registered employees in the tourism sector

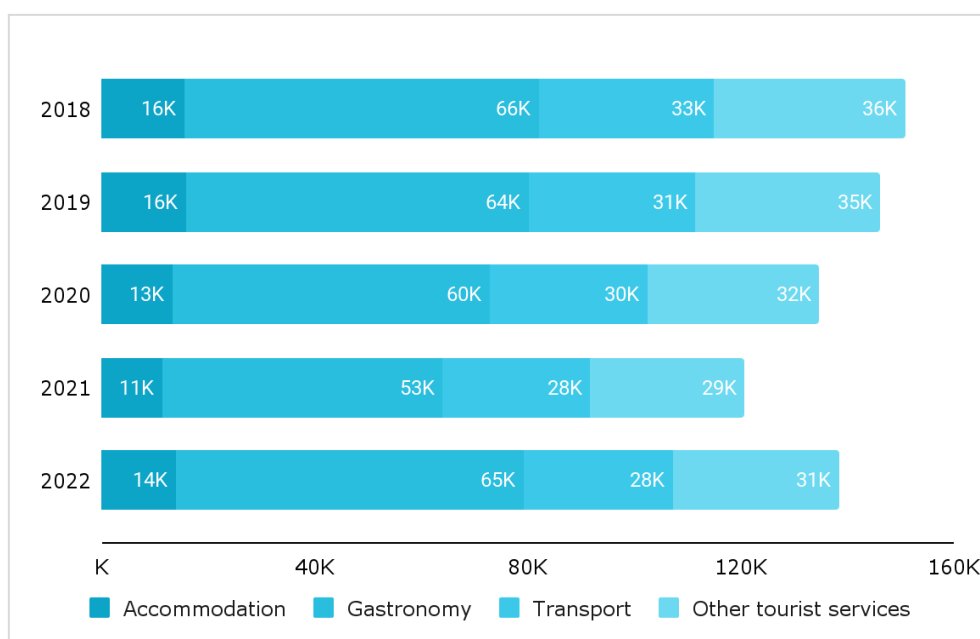
The annual average of registered employees in the key branches of tourism in the city (accommodation, gastronomy, transport, and other tourist services) was 138.446 during 2022, which implied 5% less compared to the number of registered employees during 2019.



Graphic 7: Evolution of registered employment in the TCA, December 2017-2022 (In thousands of registered jobs). Source: DGIMO-ENTUR based on SIPA data.

3.2.2. Number of registered employees per activity

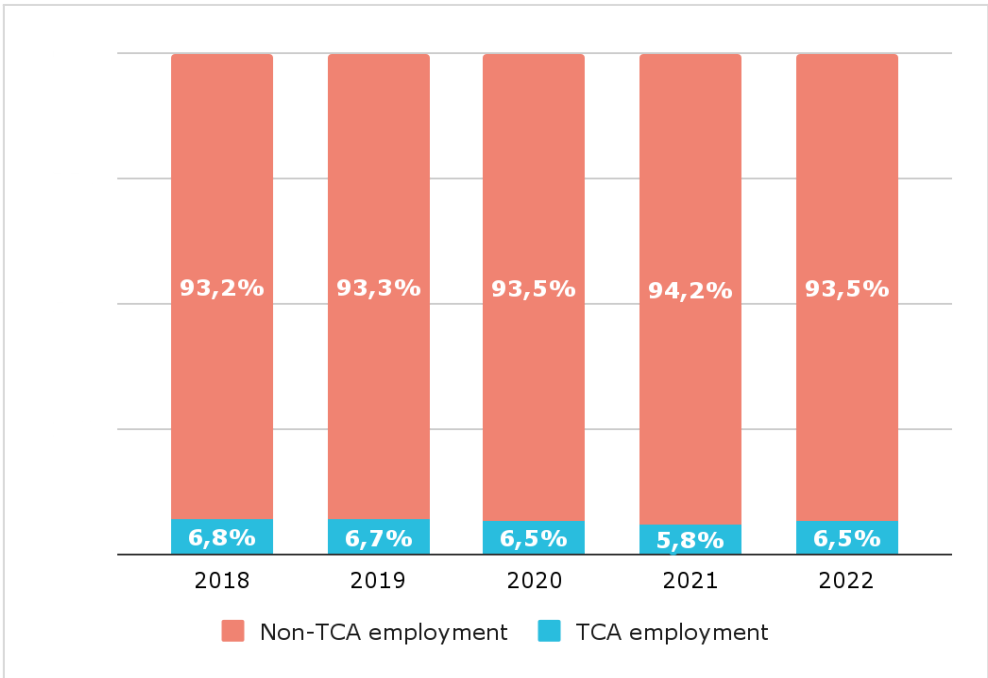
The gastronomic sector concentrates the largest number of employees of the TCA in the city, representing 47%, increasing its participation compared to previous years (44%). The rest of the TCA decreased its participation slightly compared to 2019.



Graphic 8: Annual average of registered employees per activity, 2018-2022. Source: DGIMO-ENTUR based on SIPA data.

3.2.3. 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 2022**, maintaining participation percentages similar to those of the years prior to the pandemic.



Graphic 9: Registered employment according to TCA and non-TCA, 2018-2022.
Source: DGIMO-ENTUR based on SIPA data.

3.2.4. Average salary of registered employments in accommodation and gastronomy

The average salary of registered employees in accommodation and gastronomy shows a recovery after the pandemic to levels close to those of 2018.

The average salary of formal employment in accommodation and gastronomy continues to be 62% lower than the average salary of all the productive activities of the city in the last 3 years.



Graphic 10: Evolution of salary (in USD) and percentage evolution of salary in the sector with respect to average general salary, 2018-2022. Source: DGIMO-ENTUR based on SIPA data.

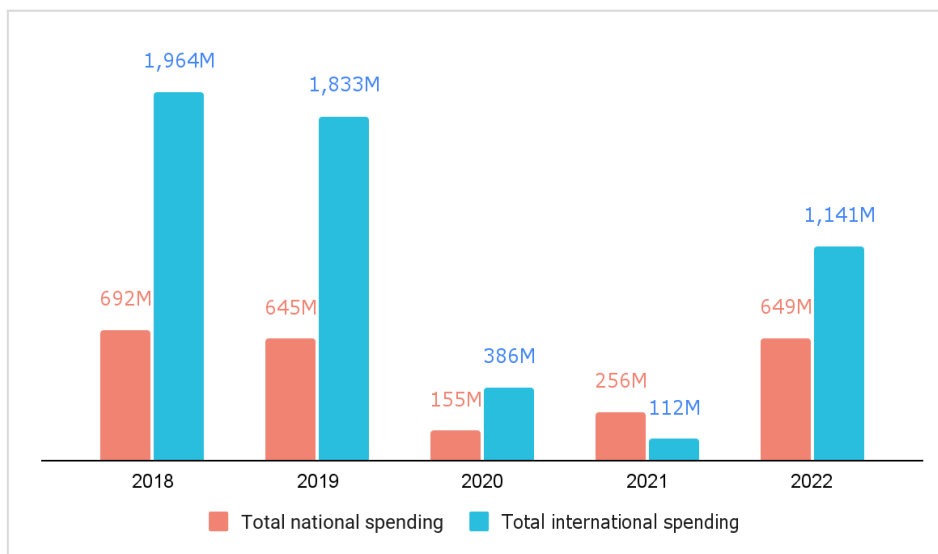
3.3. Destination Economic Benefits

3.3.1. 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 2022, the total **international tourist spending** was **USD 1141 M** and the total **domestic tourist spending** was **USD 649 M**.

The average spending per trip for international tourists in 2022 was USD 741, higher compared to 2019 (USD 628). As for domestic tourists, the average spending per trip in 2022 was USD 118, also higher compared with 2019 (USD 93).



Graphic 11: National and international tourism spending (in USD), 2018-2022.
Source: DGIMO-ENTUR based on ETI and EVyTH data.

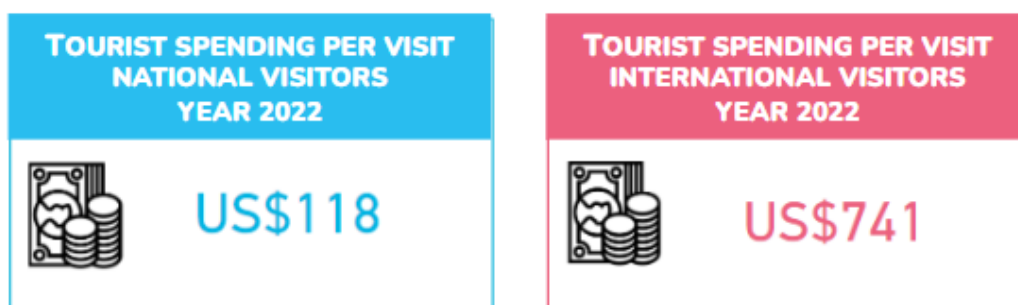


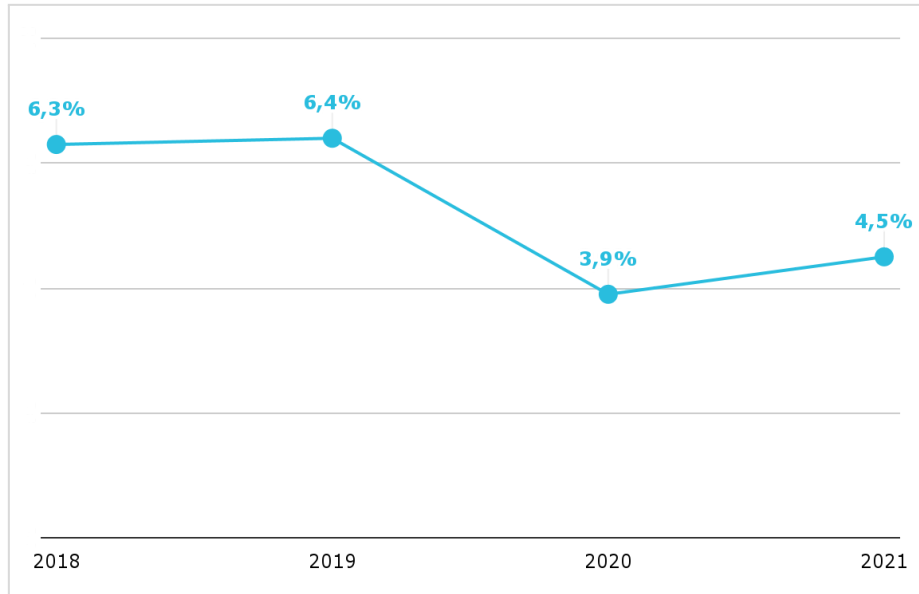
Figure 4: Tourist spending per visit. Source: DGIMO-ENTUR.

3.3.2. Share of TCA in the GGP of the city

Although at the level of Argentina there is a Tourism Satellite Account, the City of Buenos Aires does not have this instrument to analyse in detail all aspects of the demand for goods and services associated with visitor activity, observe the interface operational with the supply of such goods and services in the economy and describe the way in which this offer interacts with other economic activities.

However, according to the information provided by the Undersecretary of Economic Development and Production within the City's Ministry of Economic Development and Production, the added value of the tourism industry represented 6.4% of the total GGP of the city in 2019, and 4.5% in 2021 (taking into account the participation of the characteristic

branches of tourism). At the time of writing this report, there was no data available for the year 2022.



Graphic 12: Percent representation of added value of the tourism industry in City's GGP, 2018-2021.
Source: DGIMO-ENTUR based on MDEP-GCBA information.

3.3.3. Total number of tourists

During the year 2022, **5,5 million national tourists** and **1,5 million international tourists** visited the city, showing a great recovery after two years affected by the Covid pandemic.



Graphic 13: Total national and international tourists in CABA (in millions), 2018-2022
Source: DGIMO-ENTUR based on EOH, ETI, and EVyTH data.

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

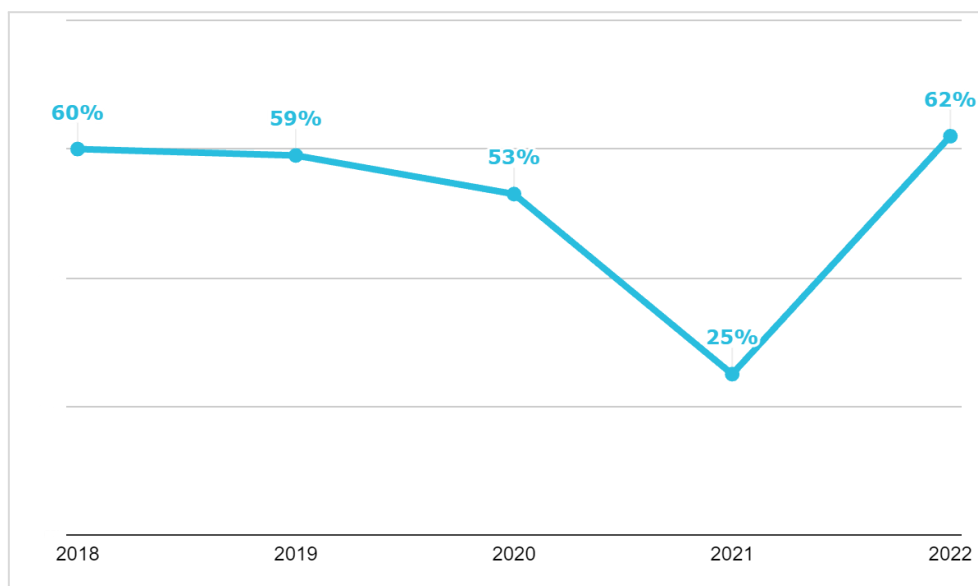
During 2022, there were an average of 347 hotels and para-hotels establishments in the city (37% less than the 2019 average).



Graphic 14: Evolution of total establishments in CABA, 2018-2022.
Source: DGIMO-ENTUR based on EOH.

3.3.5. Hotel occupancy rate

During 2022, the average occupancy rate in hotels in the city was 62% (3 percentage points higher compared to the year 2019 numbers).



Graphic 15: Evolution of occupancy percentage in accommodations in CABA, 2018-2022.
Source: DGIMO-ENTUR based on EOH data.

3.4. 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.

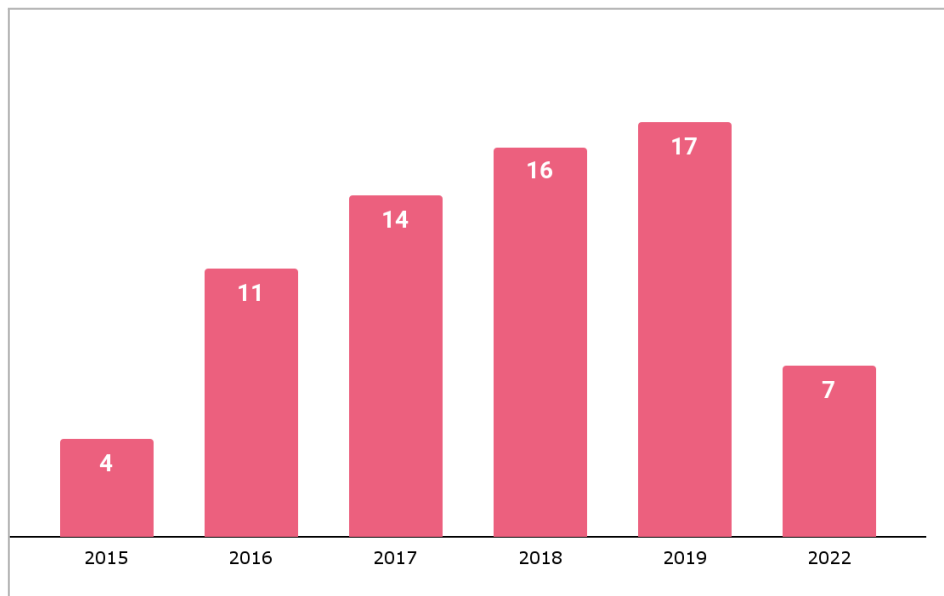
3.4.1 Number of distinguished providers in the “Environmental Management Guidelines for Tourism Providers” program

The Buenos Aires Tourism Board is in charge of the implementation of the “Tourism Sustainability Guidelines” tool, which belongs to the Argentine System of Tourist Quality (SACT). The objective of this program is to guide the tourism organisations towards the implementation of good practices capable of guaranteeing environmental quality while, at the same time, favouring its economic performance.

The Environmental Management Guidelines are made up of 34 guidelines, grouped into 9 central themes: Sustainable organisation concept; Energy management; Water management; Waste management; Natural and Cultural Heritage; Carbon Footprint; Work environment and equipment; Community, customers and suppliers; Planning and continuous improvement.

The purpose of these guidelines is to make organisations 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, 69 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 are presented in the next graphic.



Graphic 16: Evolution of distinguished tourist providers in environmental management, 2015-2022.
Source: ENTUR.

3.4.2. Number of hotels in the “Hoteles más verdes” program

The “Hoteles más Verdes” Program (Greener Hotels Certification Program), led by the Association of Tourism Hotels of the Argentine Republic (AHT), emerged as a necessary consequence in the sustainable hotel management process. It is a voluntary and multi-criteria outsourced certification program that grants labels to environmentally preferable products and services.

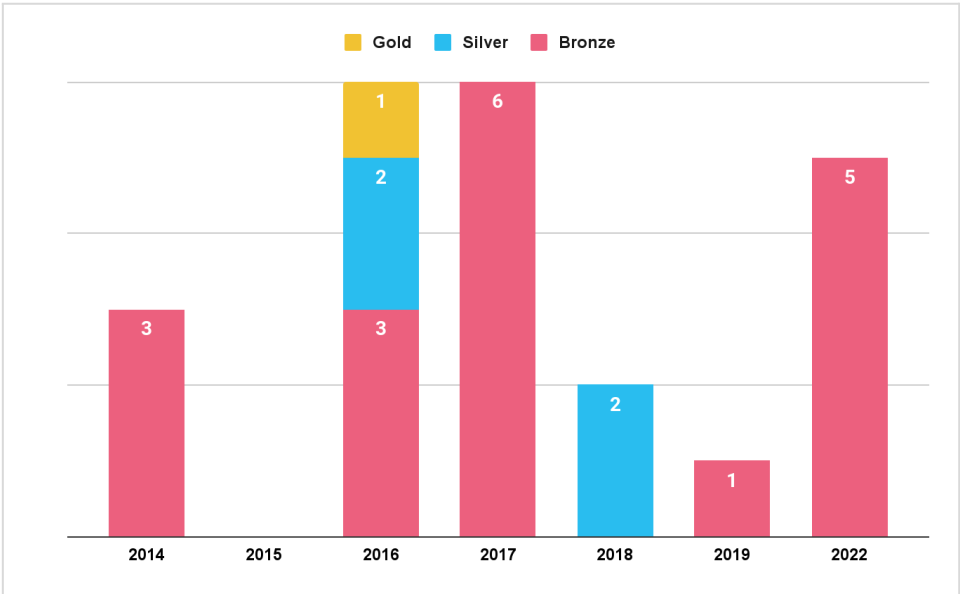


Figure 6: Insignia of the Greener Hotels Program

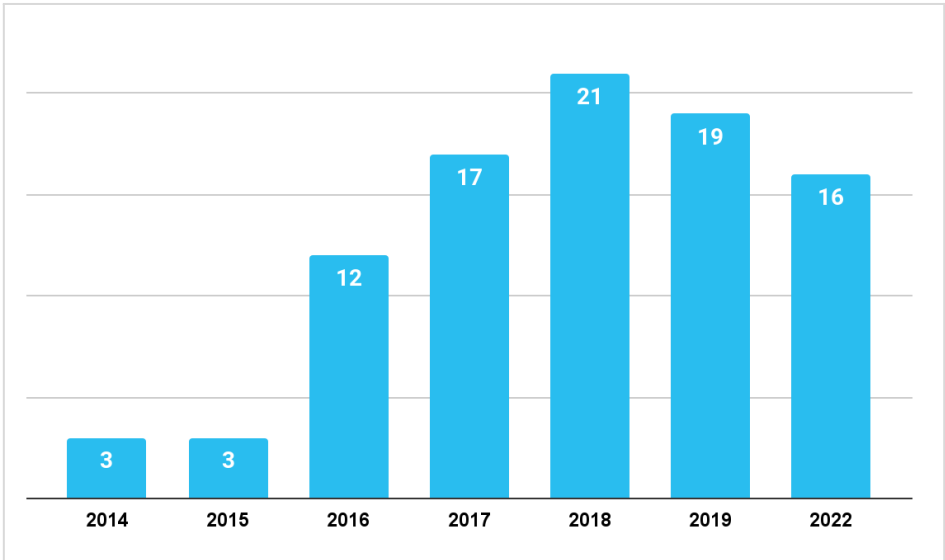
The AHT set out to establish a national eco-labeling system, based on a standard that establishes management criteria at different levels, as a model of recognition and certification of sustainable hotels. This Standard has been designed according to the Global Sustainable Tourism Criteria established by the Global Sustainable Tourism Council (GSTC)

for hotels and tour operators, in order to aspire to their international recognition and accreditation.

The program grants different levels of certification, depending on the type of measures implemented by the hotel (bronze level, silver level and gold level). The Program was implemented in 2014 in the City of Buenos Aires, and since then new hotels were certified. During 2020 and 2021 there weren't any new certifications due to Covid 19 pandemic.



Graphic 17: New HMV Program certifications in CABA per year and by certification level. 2014-2022
Source: AHT.



Graphic 18: Total accrued HMV certifications in CABA (includes withdrawals per year). 2014-2022
Source: AHT.

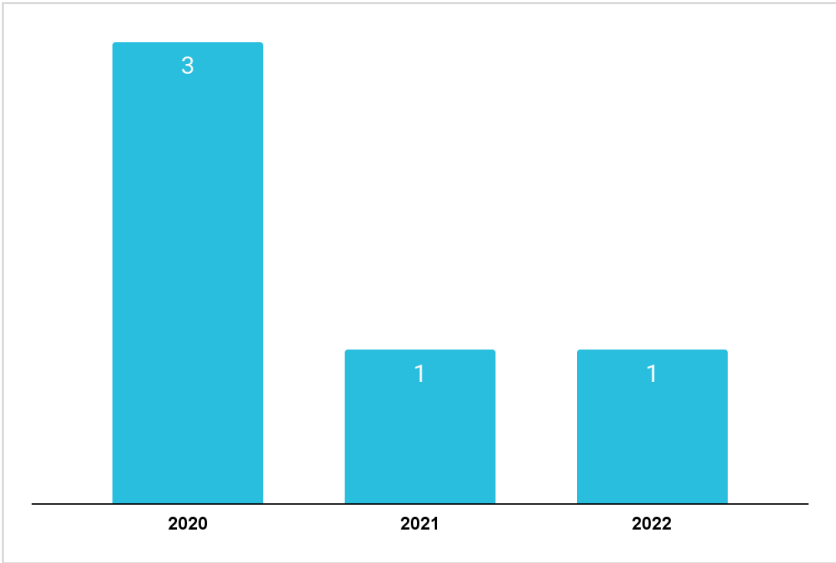
3.4.3 Number of hotels, gastronomic and cultural establishments that obtain the "Calculated Footprint" Stamp per year

The Calculated Carbon Footprint Seal is part of the Initiative for Calculating the Organisational Carbon Footprint of the Government of the Autonomous City of Buenos Aires.

This seal recognizes all public and private establishments in the City that calculate their organisational carbon footprint on an annual basis.

The purpose of this initiative is to disseminate the methodology, and raise awareness on how to carry out an organisational inventory of the Carbon Footprint to align the private and public sectors to the initiatives of the City's Climate Action Plan, and reduce their greenhouse gas emissions. greenhouse effect over time.

Within the tourism sector, hotel, gastronomic and cultural establishments participate in the program, and from the beginning till 2022, five establishments have obtained the seal. The graph below shows the evolution of the number of establishments in these categories that obtained the seal annually.



Graphic 19: Number of hotels, gastronomic and cultural establishments that obtain the "Calculated Footprint" Stamp per year. 2020-22. Source: Environmental Protection Agency. Environment Secretariat. Buenos Aires City Government.

3.4.4 Waste separation, energy and water conservation policies in hotels

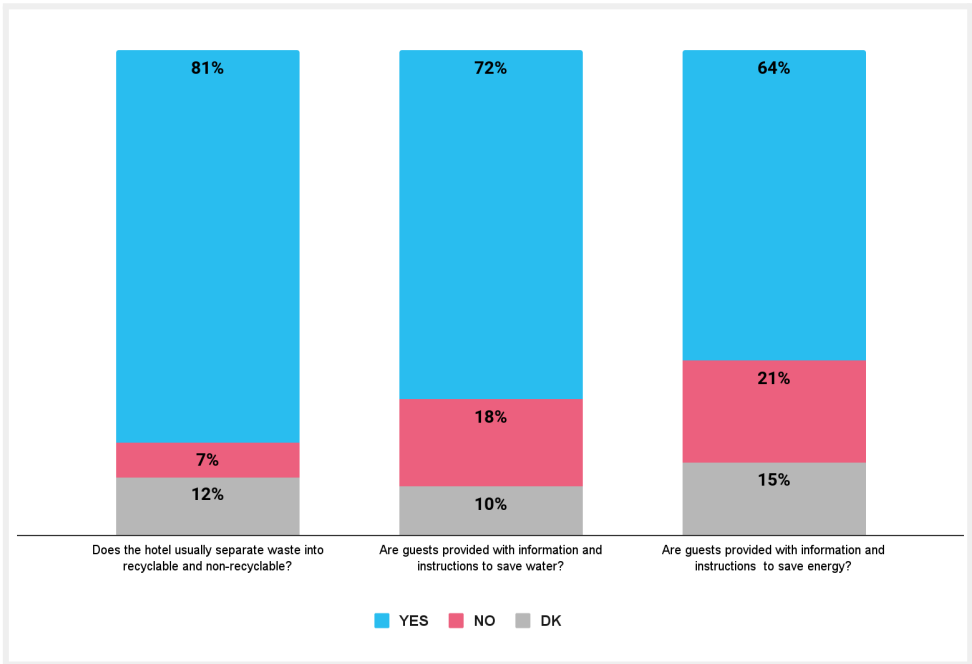
During the year 2022, specific questions were included in the Hotel Occupancy Survey conducted during long weekends in the city in 3, 4 and 5-star hotels in the city, aimed at finding out whether hotels separate waste and whether they promote water and energy conservation among their guests.

During the hotel occupancy survey for the long weekend of August 2022, the city's 3,4 and 5-star hotels were asked if they separated waste and if they provided information to guests to encourage water and energy savings during the stay.

The questions asked were the following:

- 1. *Does the hotel usually separate waste into recyclable and non-recyclable?*
- 2. *Are guests provided with information and instructions (either orally or on posters) to save water (for example, use fewer towels, turn off the tap when not in use, recommendations for bathing times)?*
- 3. *Are guests provided with information and instructions (either orally or on posters) to save energy/electricity (for example keeping air conditioning at 24° in summer, not leaving cell phones or computers plugged in, turning off lights when not in use)?*

The results of this survey are presented in the graphic below.



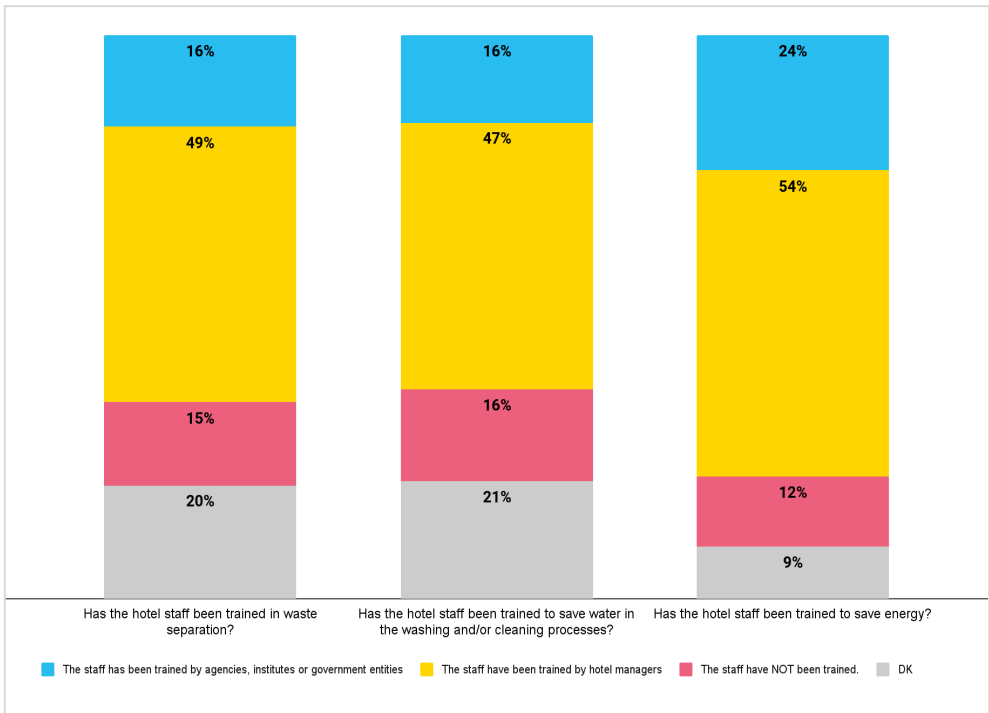
Graphic 20: Survey of 3,4 and 5 star hotels on waste separation, energy and water conservation policies in hotels-2022
Source: DGIMO

Additionally, during the survey for the long weekend in November 2022, 3, 4 and 5 star hotels in the city were consulted regarding the training of personnel in relation to environmental conservation.

The questions were the following:

1. Has the hotel staff been trained in waste separation?
2. Has the hotel staff been trained to save water in the washing and/or cleaning processes (for example, cleaning rooms, washing the sidewalks with a bucket and not with a hose, using the correct load size in the washing machines)?
3. Has the hotel staff been trained in saving energy/electricity (for example, maintaining and checking that the air conditioners are at 24° in summer, not leaving cell phones or computers plugged in, turning off lights when they are not being used)?

The results of this survey are presented in the graphic below.



Graphic 21: Survey of 3,4 and 5 star hotels on training related to waste separation, energy and water conservation-2022
Source: DGIMO

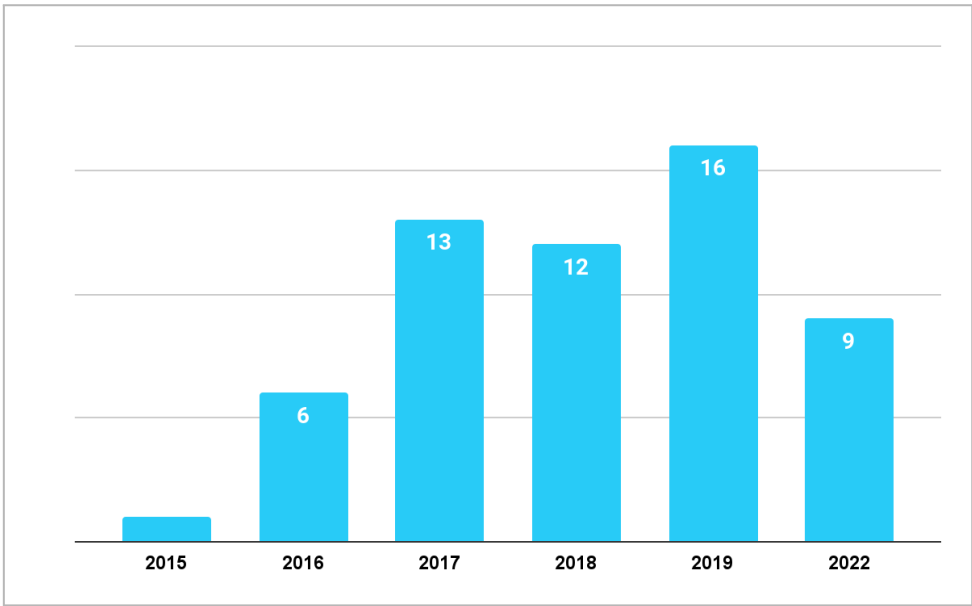
3.5. Accessibility

3.5.1. 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 organisations 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.

Between 2015 and 2019, **57 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 9 new organisations obtaining the seal of distinction during this year.



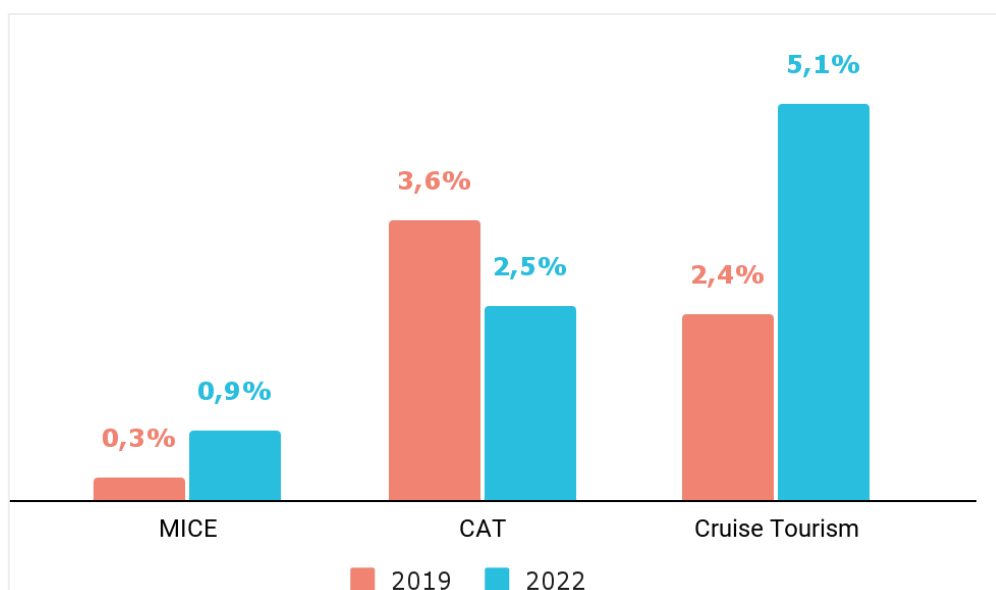
Graphic 22 : Evolution of distinguished tourism providers in accessibility, 2015-2022. Source: ENTUR.

3.5.2 People with disabilities in the travel group

Since 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 a 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 (CAT).

Given the fact that since March 2020 these primary data collection operations were suspended till January 2022, we do not have data from March 2020 till December 2021.



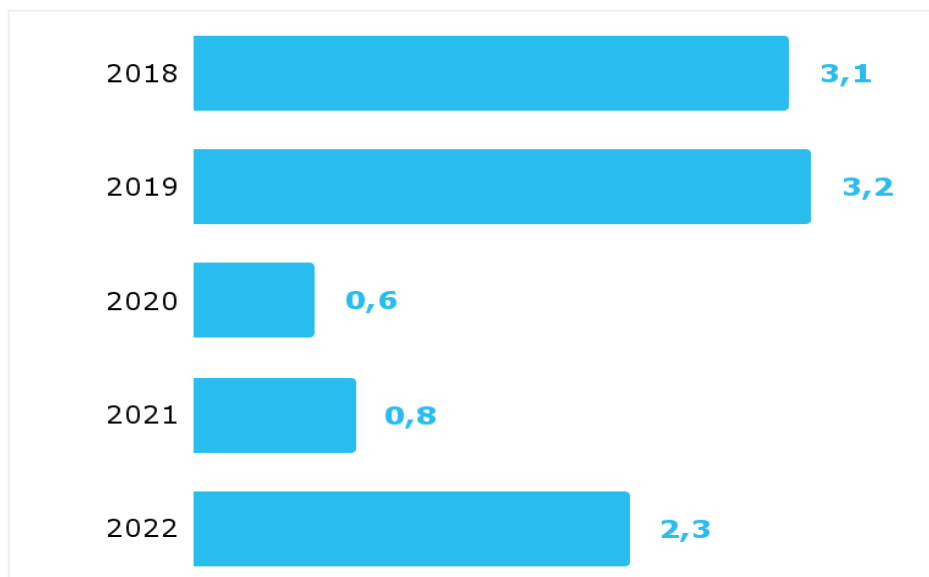
Graphic 23: People with disabilities in the travel group. Sources: CAT Survey (2019-22); MICE Survey (2019-22); Cruise Tourism Survey (season 2019-20 and 2022-23)- DGIMO-ENTUR.

Among the cruise passengers arriving during the 2022-23 season, 5,1% declared having at least one person with disability in their travel group, while among the tourists at MICE events in 2022, this percentage was 0,9%. Among the visitors surveyed in Tourist Attention Centers during 2022, 2,5% asserted to have at least one person with disability in their travel group.

3.6 Local satisfaction concerning tourism

3.6.1 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 24: Number of non-resident visitors over total population in CABA, 2018-2022.
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 2022, the tourist intensity index was 2,3 tourists for each inhabitant over the course of a year. Thus, we confirm that the city does not present difficulties related to "over-tourism".

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 (<https://turismo.buenosaires.gob.ar/es/observatorio/movilidad-turistica?2022>).

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 have updated maps to present in this report.

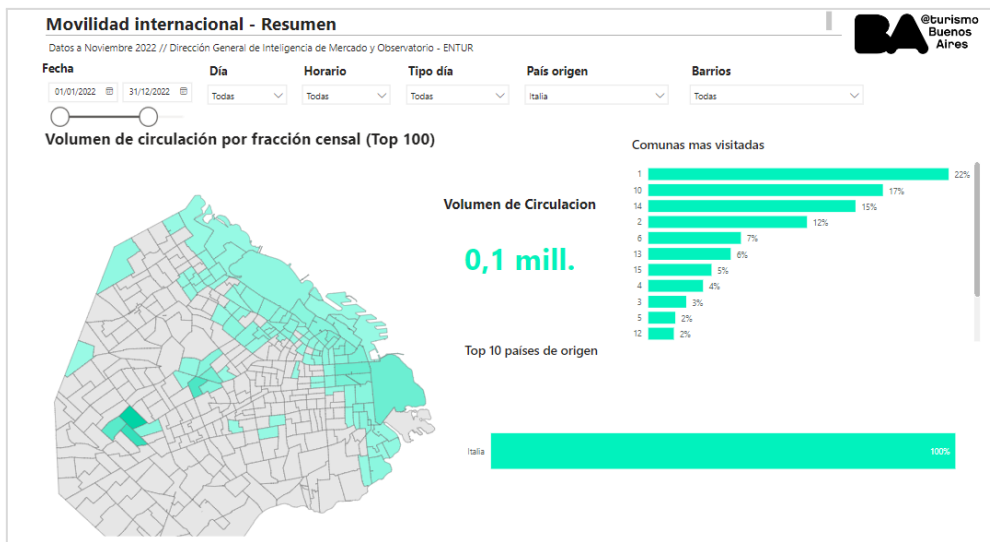


Figure 6: International tourist movement dashboard: Summary. DGIMO-ENTUR.

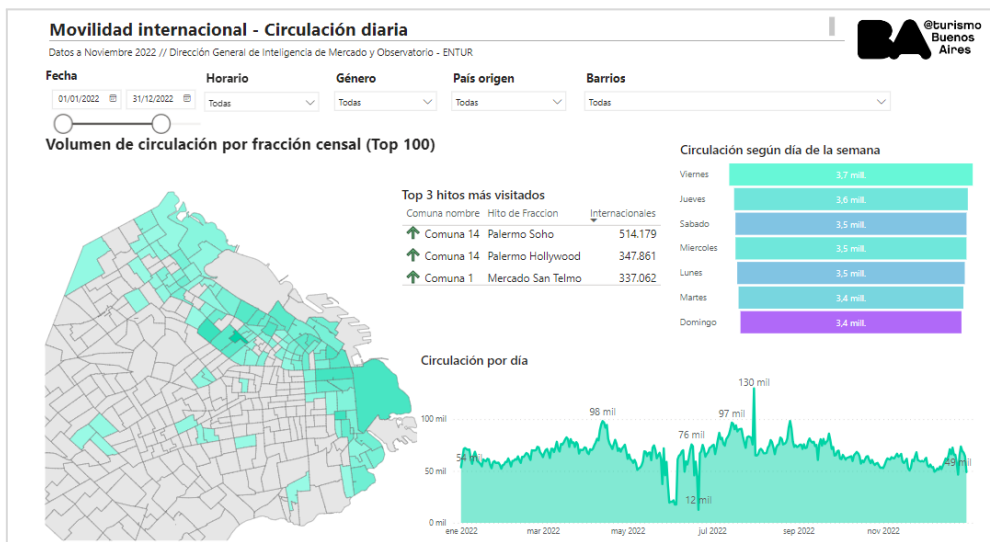


Figure 7: International tourist movement dashboard: Movement per day. DGIMO-ENTUR.

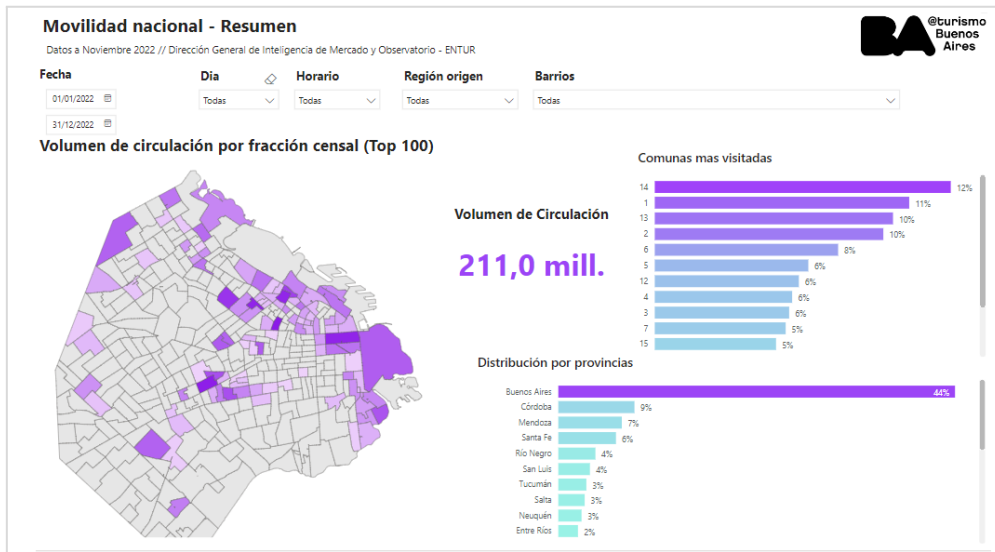


Figure 8: National tourist movement dashboard: Summary- DGIMO-ENTUR.

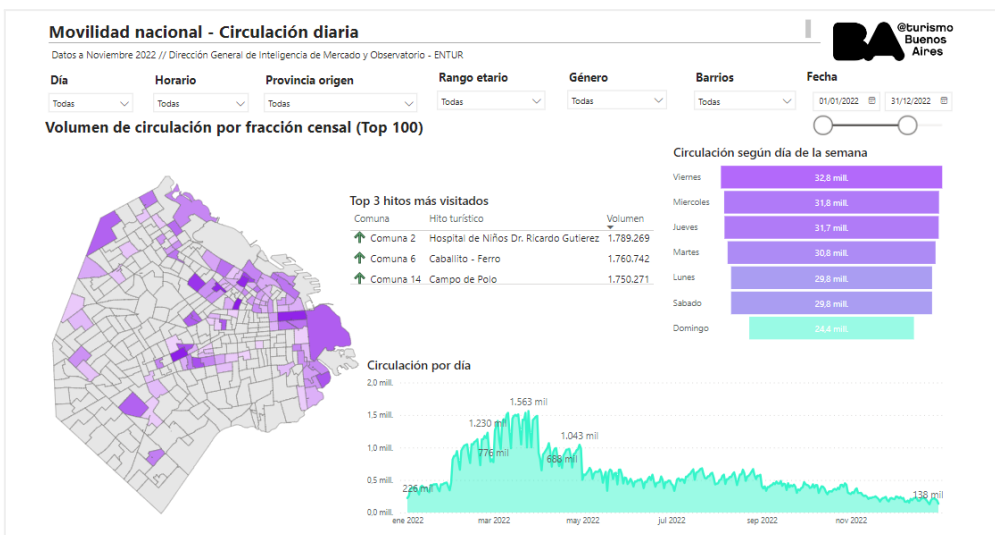
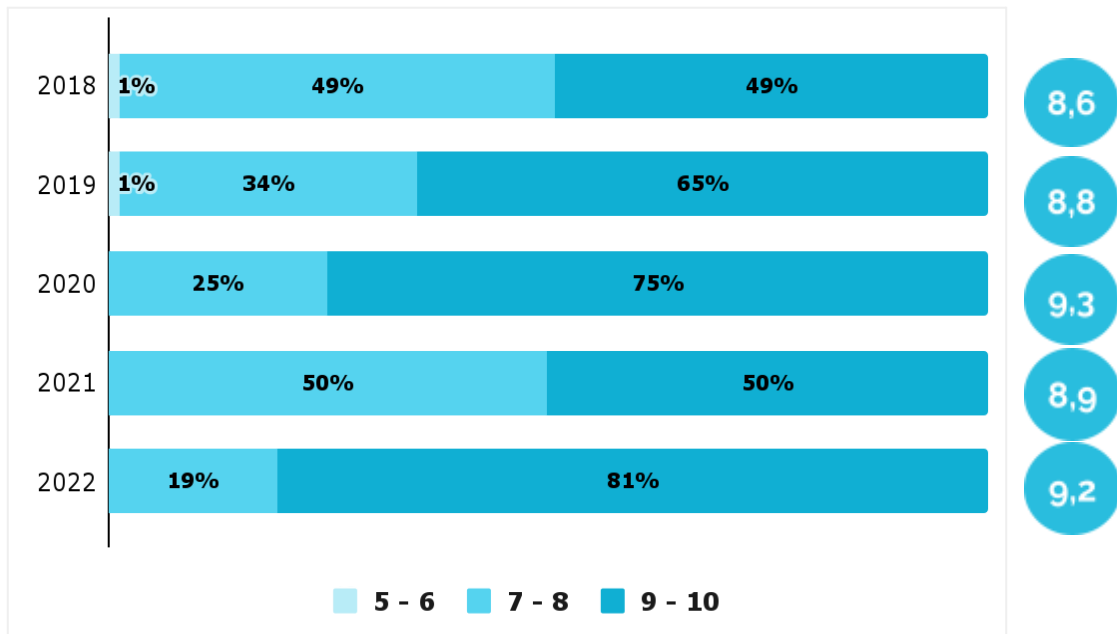


Figure 9: National tourist movement dashboard: Movement per day- DGIMO-ENTUR.

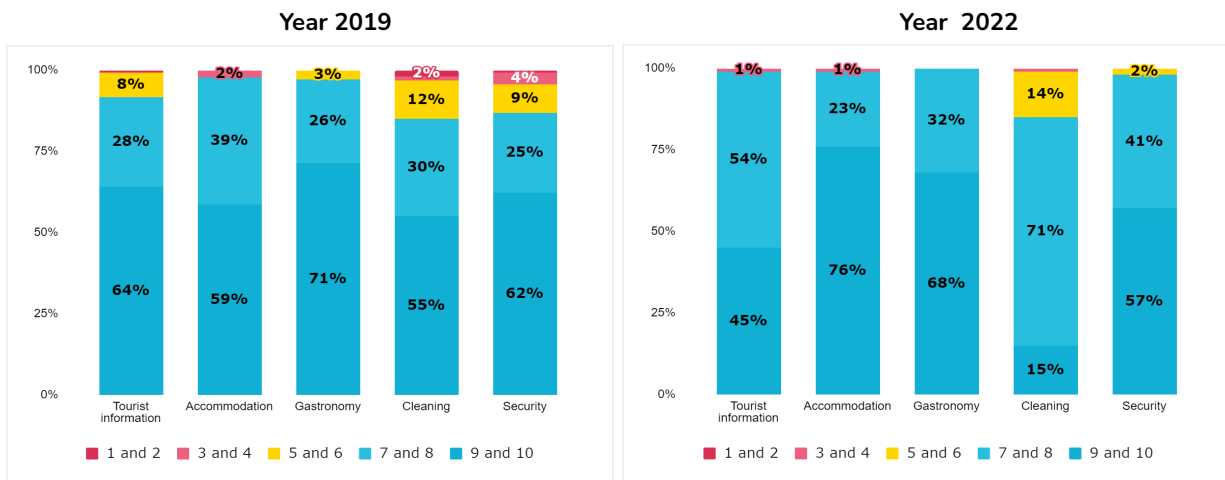
3.7 Tourist satisfaction

3.7.1 Tourists' level of satisfaction

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 CABA, 2018-2022.
Source: DGIMO-ENTUR based on EVyTH data.

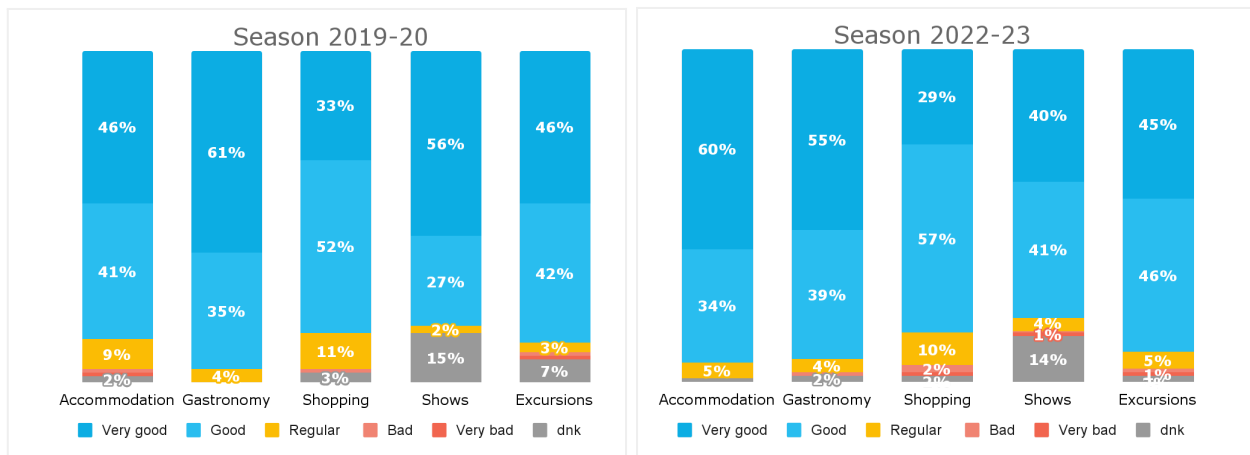


Graphic 26: Satisfaction of national tourists with different aspects, 2019-2022.
Source: DGIMO-ENTUR based on EVyTH data.

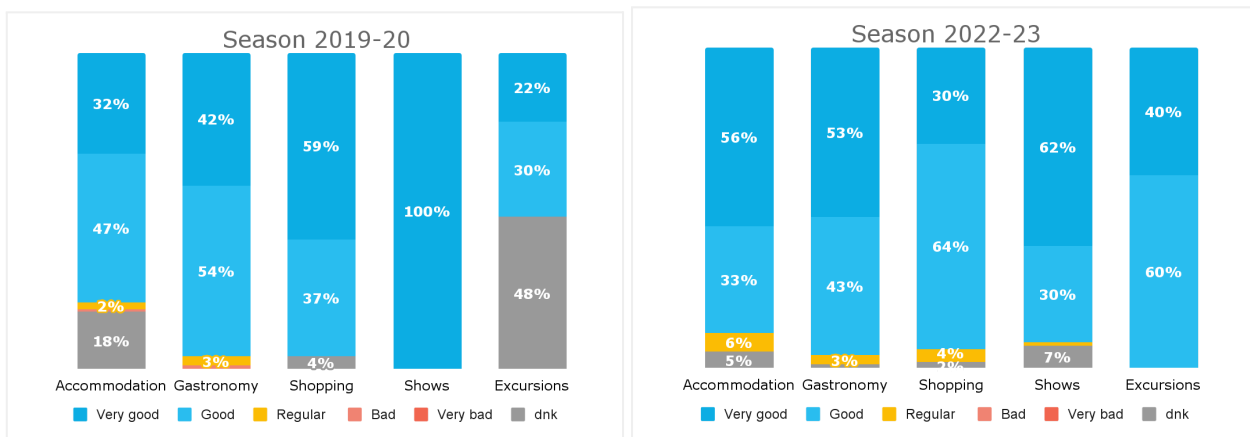
In addition to this global indicator of visitor satisfaction cited above, the Observatory measures **visitor satisfaction indicators by market segment**, for example, **cruise ship tourists** and **tourists who participate in MICE events** in the city. The survey is systematically carried out through 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 CABA).

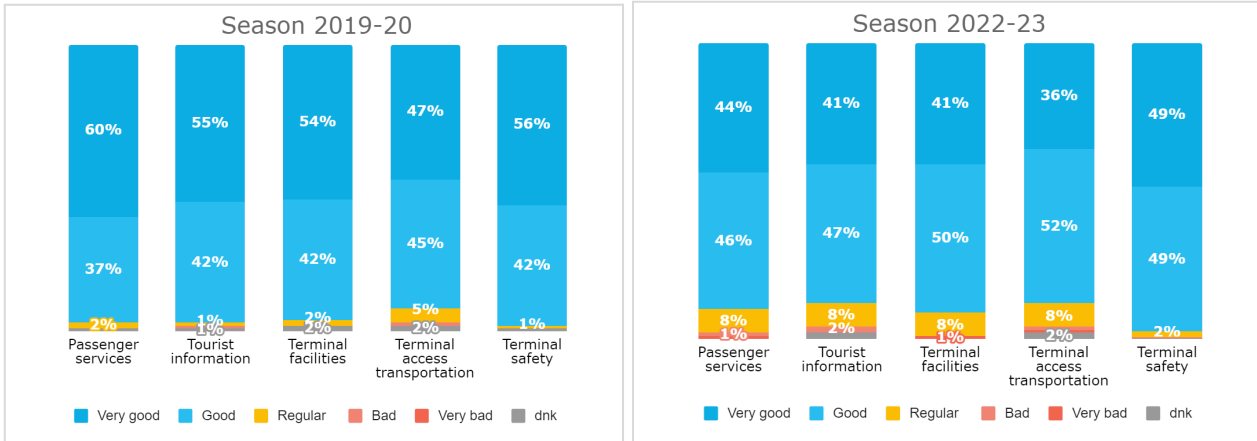
During 2022, **432 surveys** were carried out with tourists from the MICE segment at different congresses, conventions, fairs and exhibitions that were held in the city. Moreover, during the 2022-23 season, **700 surveys** were conducted with cruise passengers at the Quinquela Martín Cruise Terminal.



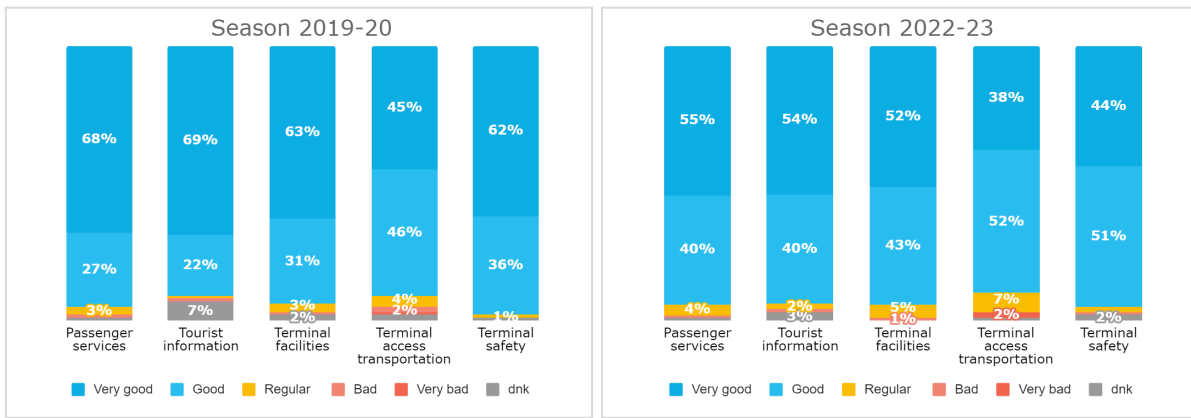
Graphic 27: Score of international tourists given to the different areas of the city service in the Cruise Tourism Survey. Source: DGIMO-ENTUR.



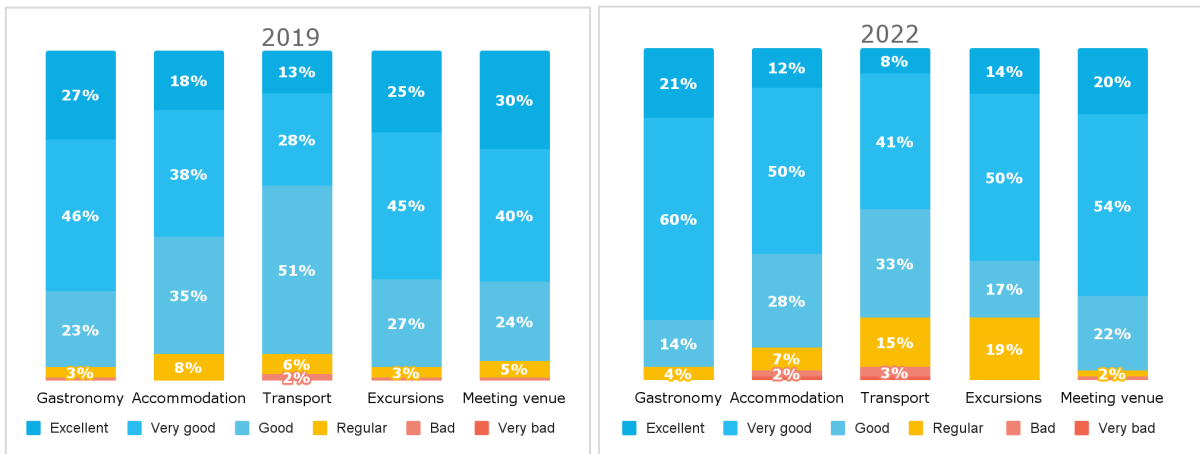
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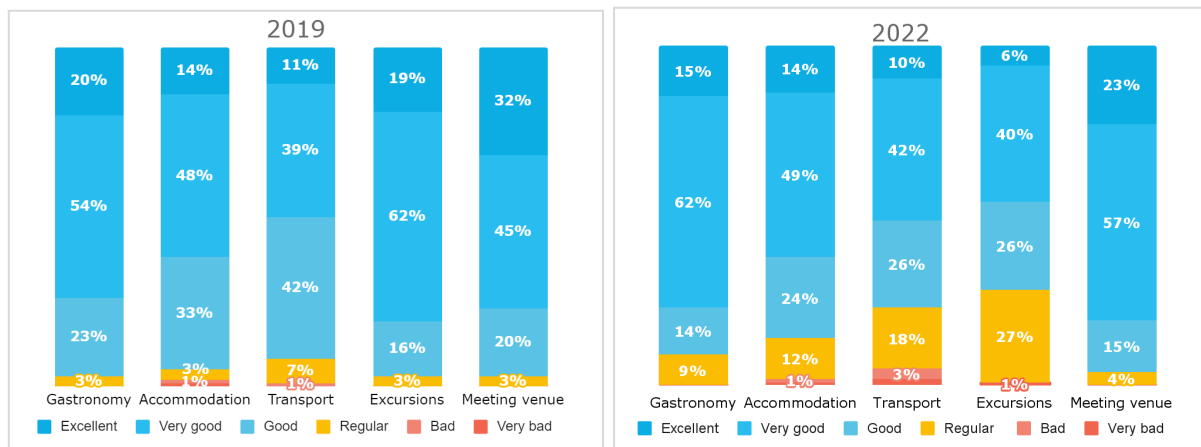
Graphic 29: Score of international tourists given to the different areas of the cruise terminal service in the Cruise Tourism Survey. Source: DGIMO-ENTUR.



Graphic 30: Score of national tourists given to the different areas of the cruise terminal service in the Cruise Tourism Survey. Source: DGIMO-ENTUR.



Graphic 31: Qualification of city services by international tourists at MICE events, 2019-2022. Source: DGIMO-ENTUR.



Graphic 32: Qualification of city services by national tourists at MICE events, 2019-2022.
Source: DGIMO-ENTUR.

3.8 Governance

3.8.1. 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 2022 the Observatory used data from six sources of information coming from the private sector:

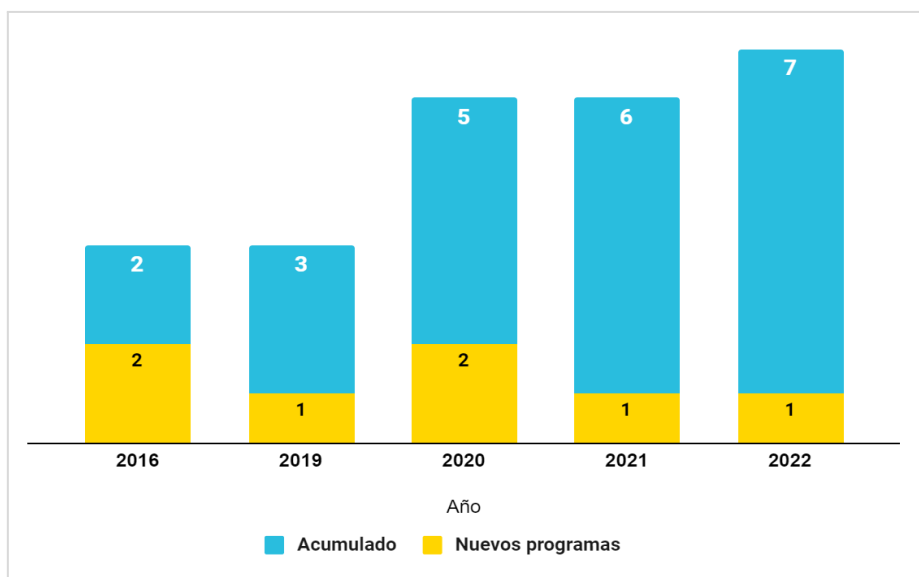
- TRP (Terminales Río de La Plata): Movement of cruise ships and passengers at the Quinquela Martín Terminal.
- Aeropuertos Argentina 2000: Arrivals and departures in local airports.
- Hotels of 3, 4 and 5 stars of the city: Hotel occupancy during long weekends.
- Claro / Telmex: Tourist movement from cellular phones.
- Airdna: Temporary rentals in the city.
- Forward Keys: Supply and future demand of flights to the city of Buenos Aires.

3.8.2. 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.



Figure 10:: New programs related to sustainability in tourism implemented by the City Government per year.
Source: DGIMO-ENTUR.



Graphic 33: Number of programs linked to sustainability in tourism implemented by the Government of the City of Buenos Aires per year.
Source: DGIMO-ENTUR.

3



Conclusions



Conclusions

The year under analysis in this report (2022) is the year of the recovery, from the definitive opening of the borders and the return to normality after the Covid 19 pandemic. All the indicators analysed show this recovery of tourism in the city, but without reaching pre-pandemic levels, especially those linked to international tourism.

During the year 2022, the Government of the City of Buenos Aires and the Buenos Aires Tourism Board worked 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.

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)

AHT: Association of Tourism Hotels of the Argentine Republic (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

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