

UNWTO/WTOTF City Tourism Performance Research

Report for Case Study: “Buenos Aires, Argentina”



Note: This is a working document

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Background

As part of the UNWTO-WTCF City Tourism Performance Research Survey, data was collected and interviews were conducted in the city of Buenos Aires, one of the 15 cities worldwide participating in this exercise.

The UNWTO-WTCF City Tourism Performance Research Survey includes five key performance areas:

- Destination Management
- Economic Perspective
- Social and Cultural Perspective
- Environmental Perspective
- Technology & New Business Models.

Based on initial desk-based research, and in consultation with the 'Ente de Turismo de la Ciudad de Buenos Aires' (ENTUR), the tourism marketing and management organization for the city of Buenos Aires, two key performance areas were identified for further investigation - Destination Management and the Social and Cultural Perspective.

Data on the performance indicators under each performance criteria were collected from official data sources at the city level. In addition, on-site interviews were conducted with ENTUR and other key public and private city tourism stakeholders (*see Annex 1*) to gain further understanding of the city.

This report presents the findings from the survey undertaken in the month of March 2017.

Acknowledgements

UNWTO and WTCF would like to acknowledge the support and cooperation received from ENTUR to undertake this work, especially the 'General Directorate of Market Intelligence and Ente Turismo Observatory' and its team for their cooperation and support during the field work conducted in Buenos Aires as well as providing all the necessary information and data.

The interpretation of the information researched, received and presented in this study are those of the author.

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I. The City of Buenos Aires

Located on the banks of the Rio de la Plata, in the centre-east of Argentina, the Autonomous City of Buenos Aires (CABA) is one of the 24 federal entities and the capital of the country. The city is at the same time the capital of Argentina and the seat of the federal government, and therefore called the Federal Capital.

Figure 1.1 Buenos Aires in the global map



Source: Press Kit ENTUR

With an estimated population of 2,890,151 inhabitants¹ (and 12,806,866 the metropolitan area) and an area of around 202 km²², the City of Buenos Aires is the largest urban conglomerate of Argentina and one of the most populated areas of South America and among the 20 largest cities in the world, and is divided into 48 districts, organized in 15 communes.

Along with São Paulo and Mexico City, Buenos Aires is one of the three Latin American cities of alpha category, according to the study of the Globalization and World Cities (GaWC) Research Network³. The City of Buenos Aires ranks also among the cities with the highest

¹ Total population and absolute and relative intercensal variation per commune. Years 2001-2010. INDEC.

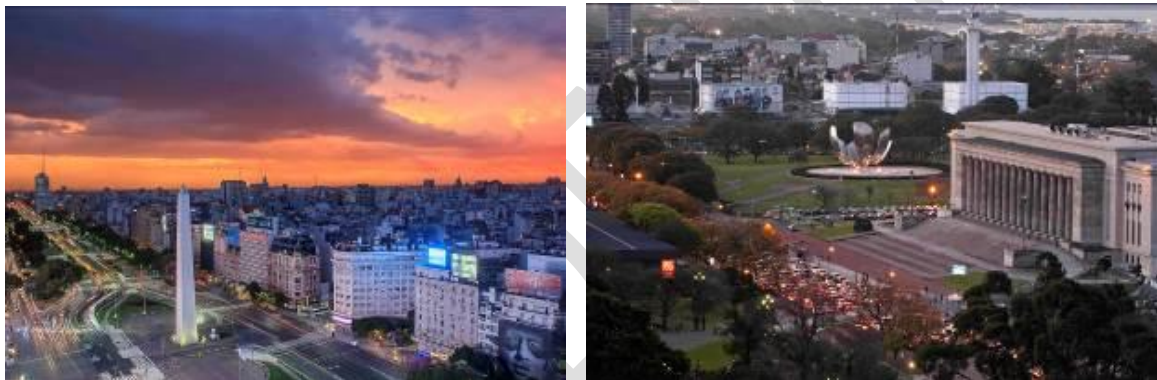
² Directorate General Document Centre of Information and Legislative File 2011. «City of Buenos Aires»

³ Globalization and World Cities (GaWC) Research Network <http://www.lboro.ac.uk/gawc/group.html>

most award-winning restaurants (Latin America's 50 Best Restaurants 2015⁶) and the best tourist destination in Central and South America (Conde Nast Traveller 2013).

A privileged location in South America connects it with the main cities of the region and the world. With two international airports, which receive more than 700 international flights per week, three hours from Rio de Janeiro and two from Santiago de Chile, Buenos Aires is a strategic centre at regional and international level, ranking #1 in the Americas and #17 worldwide in the International Congress and Convention Association (ICCA) ranking in 2016. The new Convention Centre, with capacity for 5,300 attendees, will contribute to consolidate this position in the coming years.

Figure 1.3 City of Buenos Aires – Plaza del Obelisco and...



Source: Flickr. Courtesy from ENTUR

Buenos Aires is a city that gathers history and is at the forefront at the same time. It offers its visitors the possibility of getting to know each one of their corners in an accessible and sustainable way.

In every corner, the city reveals traditions inherited from multiple cultures, which today are expressed to the rhythm of the great capitals. Its 48 diverse neighbourhoods can be met on foot with free guided tours and combine gastronomic and cultural proposals not to be missed in a city that does not sleep. In addition, its extensive parks and plazas, its coastlines and reserves make Buenos Aires an eco-friendly and healthy city.

⁶ <http://www.theworlds50best.com/latinamerica/en/the-list.html>

Figure 1.4 City of Buenos Aires – Puerto Madero and ...



Source: Flickr. Courtesy from ENTUR

The City of Buenos Aires stands out for having a very active cultural life. Most of the cultural activities are carried out through different agencies, establishments and events under the jurisdiction of the City Government: 30 libraries, 11 museums, 7 theatres, 43 cultural centres in the neighbourhoods, the cultural centres of Recoleta and General San Martín Planetarium Galileo Galilei, the Historical Institute of the City and the different festivals organized by the Government of the City of Buenos Aires (GCBA), among others.

II. Buenos Aires Tourism Trends

Importance and economic impact of city tourism in Buenos Aires

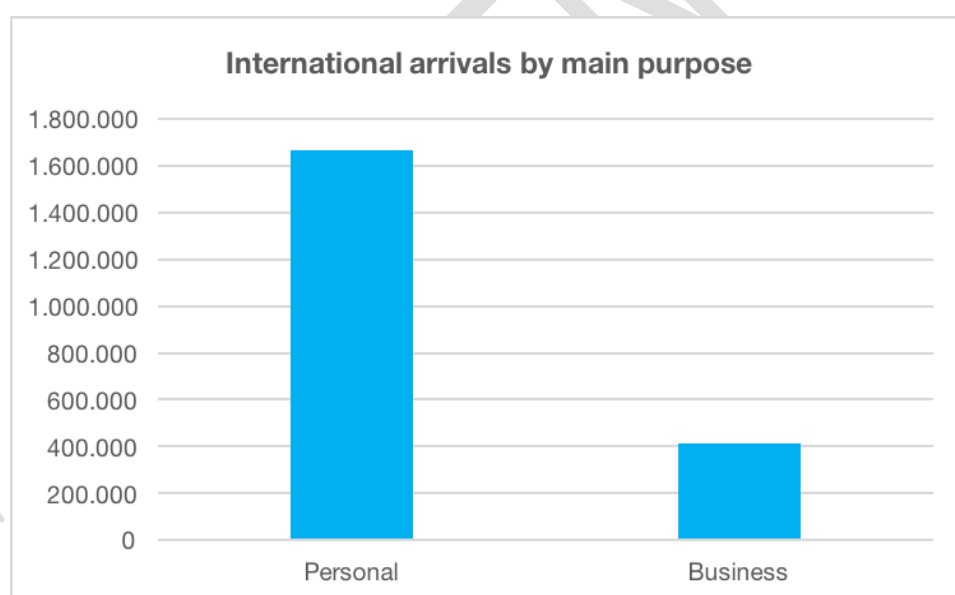
Tourism is one of the main drivers of the economic development of the City of Buenos Aires (Ciudad Autónoma de Buenos Aires - CABA) and a sector with high potential.

10.8 million tourists visited CABA in 2016 ⁷, from which 2.1 million were international visitors (19% of the total) and 8.7 million national tourists (81%).

The total foreign bed nights were 18,476,837 and the average length of stay was 8.9 nights.

Of the total foreign arrivals, 1,666,717 tourists came for personal / leisure reasons and 413,263 for business reasons.

Figure 2.1 International Arrivals by main purpose



Source: International Tourism Survey (ETI, Ministry of Tourism)

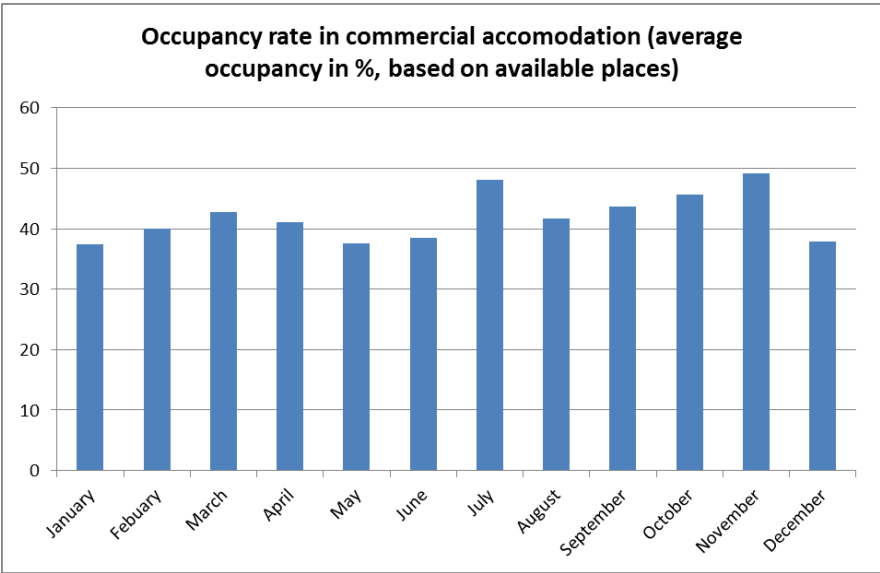
By modes of transportation 1,850,723 foreign tourists came by air while 229,257 came by water (*the information regarding the number of tourist that came by land is not available*).

The average size of travel party was 1.9 and the seasonality index (*measured by the Gini coefficient*) 0.045.

⁷ International Tourism Survey (ETI). National Ministry of Tourism

The occupancy rate in commercial accommodation throughout the year was:

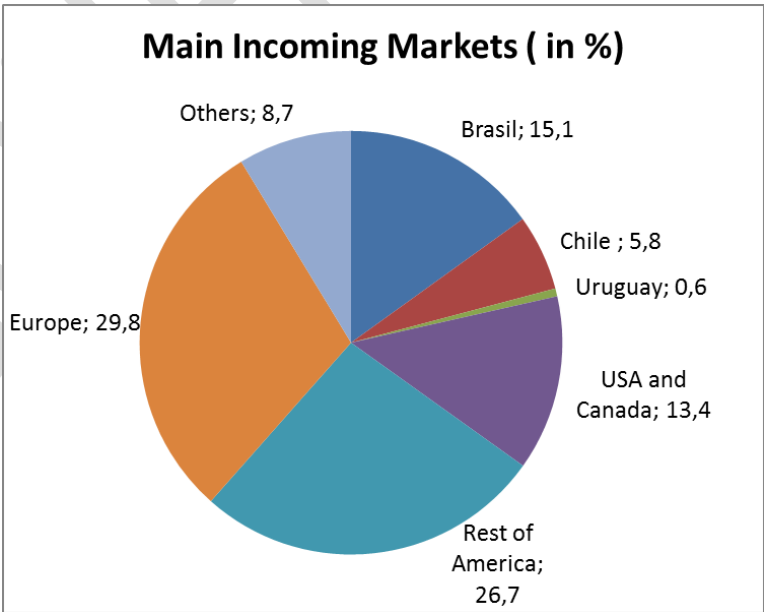
Figure 2.2 Occupancy rate



Source: Hotel Occupation Survey (Encuesta de Ocupación Hotelera - EOH)

The major incoming markets for Buenos Aires were

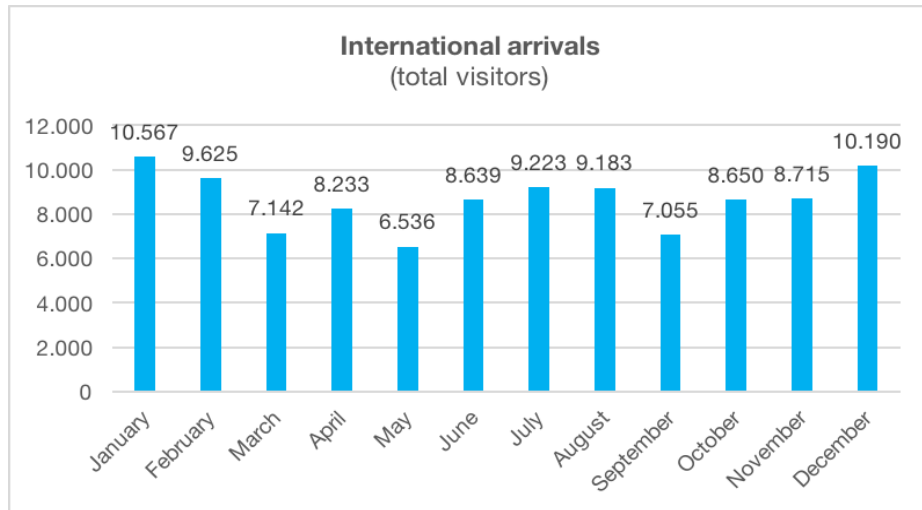
Figure 2.3 Main incoming markets



Source: National Tourism Survey (Encuesta de Turismo de la Nación ET), Ministerio de la Nación

And the number of same-day visitors:

Figure 2.4 Same-day visitors



Source: International Tourism Survey (ETI), Ministry of Tourism

The number of formal jobs in the tourism industry in 2016 was 149,000 ⁸, which represent 6.9% of total jobs in the local economy. November is the month with the higher number of tourism jobs (1.5% higher than the average) while June is the lowest (1.4% lower than the average).

The total expenditure was USD 2.9 billion: International tourists spent USD 1.5 billion (54% of the total) while national tourists spent USD 1.4 billion (46%).

The relative contribution of tourism sector to the destination's economy as % of the GDP was 6,4% in 2014 ⁹.

The inbound tourism revenues by source market were:

The average daily expenditure per tourist daily spending in the case of overnight visitors was USD 100.2 ¹⁰.

⁸ SIPA (Sistema Integrado Provisional Argentino),

⁹ SIPA and the General Directorate of Statistics and Censuses of the City of Buenos Aires

¹⁰ International Tourism Survey (Encuesta de Turismo Internacional ETI)

Table 2.1 Inbound tourism revenues per visitor by source market

Market	Value (in dollars)	%
Brasil*	772	14%
Chile *	658	12%
Uruguay **	369	6%
USA and Canadá*	1.172	21%
Rest of América*	920	16%
Europe*	781	14%
Rest of the world*	1.013	18%
Total	5.686	

*average expenditure (air transport arrivals). Year 2015

**average expenditure (air and water arrivals). Year 2015

Source: ENTUR

Overall Tourism Trends

During the period 2011-2015, there was a decrease of 8.5% in the number of international arrivals in Buenos Aires, while in the last 6 months, tourism has shown a positive trend compared to the same period of the previous year.

Some of the aspects that have favoured the increase in international arrivals have been:

- The reduction of migration restrictions for Chinese citizens.
- The suspension of the payment of the reciprocity fee for US, Canadian and Australian citizens.
- Increased air connectivity with Oceania (Air New Zealand).

ENTUR estimates that number of international tourist arrivals will increase from 2.1 million in 2016 to 2.65 million in 2020 while expenditure will increase from USD 1.5 billion to USD 2.0 billion respectively, being the main two reasons for this increase a greater aerial connectivity and the increase of tourism competitiveness, as well as intelligent tourism promotional strategy.

The most dynamic regions according to the 'potentiality index' developed by ENTUR are the Americas, Europe and Asia and Oceania, while the markets with the highest sustained growth are China, the United States, the United Kingdom, Germany and Canada.

- Trends by segments ¹¹

Cruise tourism

With regard to cruise tourism, for the period 2016/17, a total of 73 arrivals are forecasted with an estimated total of 259,000 cruise passengers.

Cruise tourism has been declining in recent years (160 arrivals in 2012/13 with 510,815 cruisers).

Since 2016, this segment has been strengthened, with initiatives such as the initiation of conversations between national authorities and cruise companies, the identification of obstacles to finding solutions and the reduction of migratory and water way rates in ports of call

Luxury segment

The luxury segment is another segment to be promoted, having been identified as a key segment to be managed due to its economic impact, the increase in the demand for Buenos Aires as a high-end destination and the increase in the offer of unique experiences developed by the private sector.

Regional Tourism

Regional tourism has been traditionally led by the Brazilian market. However, Brazilian tourism has experienced a significant drop in recent years, with a total of 428,254 Brazilian tourists received in 2015 (10.4% down from 2014) mainly due to the crisis in the Brazilian economy together with the increase in prices in Argentina.

Chile, Uruguay and the rest of Latin American countries, together with the Brazilian market, represented a total of 1,137,476 tourists in 2015 (approximately 10% of total tourism), representing a decrease of 8.37% over the previous year

In this segment, the objective is to position Buenos Aires as one of the most attractive and competitive cities in the region, transforming it into a preferred destination for this market, highlighting the quality of the offer and prioritizing sustainability and innovation.

¹¹ Data from the City of Buenos Aires Tourism Promotion 2017 Strategic Plan ETBA

National Tourism

As far as national tourism is concerned, Buenos Aires received a total of 7,724,713 tourists in 2016, an increase of 1.5% over the previous year. The average daily expenditure of the national tourist represented USD 48.9 in 2015.

The main objective is to keep the city as the main tourist destination of the country.

MICE Tourism

Buenos Aires ranked #1 in the Americas and #17 worldwide in the International Congress and Convention Association (ICCA)¹² ranking in 2016.

The city organized a total of 1,097 events in 2015, of which 985 corresponded to congresses and conventions, 91 to ICCA congresses and 112 to fairs and exhibitions, which represented a total of 4,902,153 attendees.

According to the Tourism Observatory of the City, the estimated total economic impact in 2014 was USD 243.3 million and the average expenditure of USD 170 for national visitors and USD 316 for international visitors.

Buenos Aires aspires to become the leader in the meeting tourism segment in the Latin American region, and an international reference.

Buenos Aires will have a new Convention Centre in 2017. Located in the neighbourhood of Recoleta, this building will have three underground floors with rooms for conferences and events. It will be equipped with solar panels in the exterior for the generation of energy, in compliance with the sustainability norms of the city. Located in a strategic place, the project includes a future subway station (line H) and several bus stops.

¹² International Congress and Convention Association (ICCA)
<https://www.iccaworld.org/newsarchives/archivedetails.cfm?id=6607>

Figure 2.5 Buenos Aires new Convention Centre



Source: ENTUR

LGTBIQ Tourism

According to ENTUR, regarding the LGTB segment, Buenos Aires is the first urban destination chosen by this group in the region, the seventh urban destination at the international level and the first urban destination chosen by luxury tourism.

445,000 tourists annually choose Argentina as their destination, of which 70% stay in Buenos Aires.

This segment accounts for 15% of the world tourism spending, with an annual growth of 9.6%, thus being an important market segment for the City of Buenos Aires, which aspires to remain the leader for this segment in the Latin American region.

Shopping Tourism (Fashion, Arts, Design)

Buenos Aires established in 2016 the 1st Shopping Tourism Forum: Fashion, Art, Design BA, involving more than 60 actors from different sectors and different areas of the city, which is an innovative tourist marketing tool.

The objective is to position Buenos Aires as a reference in the Latin American region in the shopping tourism segment: fashion, art and design.

Health and Wellness Tourism

The health and wellness segment has been one of the fastest growing segments in the last decade worldwide, representing 55 million medical tourists, who spend 5 to 9 times more than a conventional tourist.

The objective of the ENTUR is to position the city as a regional and international reference in this segment. For this, the country has an outstanding history and background in medicine, has a state-of-the-art private health and technology infrastructure and a wide range of spa in exclusive hotels, as well as an attractive healthy gastronomy offer.

III. Buenos Aires: Tourism Performance Research Survey Findings

A. Destination Management

Destination Growth Strategy	Yes / No
Performance Criteria	
Existence of a DMO at the destination	Yes
Clear vision and governance structure for destination in place	Yes
Sustainable tourism policy and regulations within the overall development strategy of the city	Yes
Differentiation of the destination (USP and/or UEP?)	Yes
Public and private sectors commitment/involvement	Yes
Collaboration with the stakeholders within and across sectors	Yes
Regular update of the strategy & action plan	Yes
Performance measurement tools in place	Yes
Visitor Satisfaction	
Performance Criteria	
Repeat visitation (within 5 years)/recommendation	Yes
Analysis of the visitor satisfaction with different elements of destination	Yes
Analysis of the visitor satisfaction with their overall experience at the destination	Yes

A.1. Destination growth strategy

Destination Management

ENTUR is the Destination Management Organization (DMO) in charge of tourism development and promotion of the city. Its main objective is to design and implement policies and programs for the development and promotion of tourism as a strategic economic activity of the city.

There is a new Director General of the Tourism Entity since December 2015, coinciding with the changes occurred at the Nation and City levels due to the change in the Presidency of the Nation after the elections in November 2015. A new strategic plan for the destination was developed by ENTUR with the aim of giving a new push to the tourist sector in the city.

ENTUR is structured through 4 General Directions:

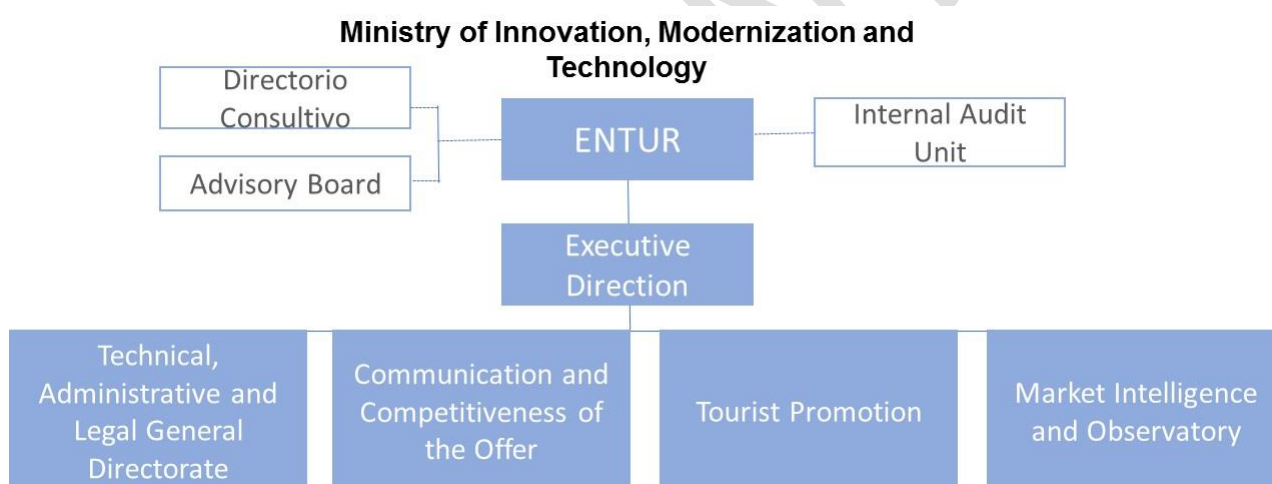
- 1) The General Directorate for Development and Competitiveness of the Tourism Offer.
- 2) The General Technical, Administrative and Legal Directorate.

- 3) The General Directorate of Market Intelligence and Ente Turismo Observatory.
- 4) The General Directorate for Tourism Promotion.

ENTUR has also a management team in charge of accessibility and inclusion tourism policies and works together with other ministries and governmental agencies of the city in aspects such as environmental sustainability or the management of green spaces.

At the operational level and in relation to other stakeholders in the city, ENTUR works with different actors, organizations and associations such as the Association of Tourism Hotels of the Argentine Republic (AHT) or the Association of Hotels, Restaurants, Confectioneries and Cafes (AHRCC), and there is an advisory council in which topics of interest to the tourism sector are discussed.

Figure 3.1. ETBA Organization Chart



Tourism Development Policy

The strategic plan designed by ENTUR establishes a clear goal at the management level: Duplicate the impact that tourism has on the economic development of the City.

Within this framework, four specific strategic objectives of ENTUR have been established:

1. Increase by 2019 the average travel expenditure per foreign tourist in CABA by 35% cumulative (average expenditure in current pesos).
2. Positioning Buenos Aires in the next 4 years among the 10 most attractive cities in the world according to TripAdvisor rankings.

3. Increase by 2019 the number of foreign tourist's arrivals to CABA.
4. Increase the number of jobs in the tourism industry in CABA by 2019 by 10%.

Although the objectives of ENTUR since the entry of the new team on December 22, 2015, are made with a time horizon of 2019, it works in the medium and long term, accompanying the project 'Buenos Aires 2027' to be presented very soon.

To achieve the objective established by ENTUR to double the economic impact of tourism in the city, the Directorate General of Market Intelligence and Observatory was created, starting with the reformulation of the former General Directorate of Observatory.

The new General Directorate (GD) has two Managements:

1. The Operational Management of Market Intelligence, which performs the functions of market intelligence, big-data and economic observatory.
2. The Operational Research Management, which fulfils the functions of tourist and sociological research and surveys.

Its main areas of work are:

1. Analyse the decision process of the tourist when choosing a destination.
2. Determine how to attract new tourists from new markets.
3. Analyse tourist behaviour in Buenos Aires

The GD is currently developing new projects to attract international markets in pursuit of the economic growth of tourism in the City.

All the GD's projects (both the periodical and the ones planned for a single time, and those that arise on-demand from other areas of government) go towards this objective of ENTUR to double the economic impact of tourism. For this reason, on receipt of the former GD, the GD stopped different projects that were not aligned with the strategy.

Among the new projects the DG is developing we can mention:

1. The development of Big-Data, turning Buenos Aires into the first city of South America with own development of a big-data tool applied to tourism.

2. The creation of the Tourist Potential Indicator.
3. The creation of the 'Mi BArrio' research project to bring tourism to more neighbourhoods.

The Mi BArrio project has as main objective to analyse the main characteristics in terms of identity and potential tourist attractions of different neighbourhoods of the city with the purpose of defining strategies aimed at promoting visits and tourism, both internal and external, to them.

Figure 3.2 Mi Barrio Project – Neighbourhoods covered



Source: ENTUR. Mi Barrio Project

The main purpose of the Big-Data project is to provide ENTUR with a tool that allows it to establish and analyse market information with the objective, on the one hand, of designing new products and tourism offer, as well as for marketing strategy design and tourism promotion, and, on the other hand, to evaluate the economic impact of tourism in the city.

Positioning Strategy

The objective of ENTUR is to position Buenos Aires as an attractive city for different targets with the final aim of increase tourism and income in the city.

In terms of positioning, the 2020 vision is to make Buenos Aires 'the most passionate capital in Latin America, known by its sophistication, eclecticism and originality'.

Current Buenos Aires tourism brand is based around the concept 'BUENOS AIRES, TODAS LAS PASIONES' (Many Passions)¹³.

At the brand communication level, the concept and logo 'Vamos Buenos Aires' as well as 'La Ciudad de todos los Argentinos' ('The City of all Argentines') are used for internal purposes, while at the external level (tourist promotion) the 'Todas las pasiones' (Many Passions) concept is used.

Figure 3.3 Visual image / logos used by the City of Buenos Aires



Source: ENTUR

Strategic Pillars

The strategic pillars on which the vision and positioning strategy is based are:

1. Intensity / Experience / Passion
2. Culture and Entertainment
3. Contrasts

¹³ <https://turismo.buenosaires.gob.ar/es/article/as%C3%AD-somos-y-conocenos>

1. Intensity / Experience / Passion

When visiting Buenos Aires, you will experience a sensation different from that of any big city. Far from being a mere spectator of attractions, the visitor will discover a living and latent city that writes and rewrites its history at every moment.

The interaction is a hallmark of Buenos Aires and its friendly and expressive hosts make the visitors feel a real bond with the city. Everything in Buenos Aires feels intensely, and one cannot go through it without being left with the feeling of having lived an authentic experience.

Figure 3.4 Tourists in the City of Buenos Aires



Source: Flickr. Courtesy from ENTUR

2. Culture and Entertainment

Buenos Aires has probably the best and most diverse cultural and entertainment offer in the entire region, covering all artistic disciplines and budgets, from the most varied artistic and cultural manifestations in its streets, to its Theatre circuits in Corrientes and Off-Corrientes, passing through the best museums, offering a unique cultural experience to visitors.

The city has also an inexhaustible offer of restaurants, that position Buenos Aires as a gourmet destination, with a gastronomic offer recognized worldwide; as well as world-renowned bars and nightlife.

It has also a wide range and diversity of parks and markets spread around its more than 100 neighbourhoods.

Figure 3.5 Buenos Aires Culture - Café Tortoni and Usina del Arte



Source: Flickr. Courtesy from ENTUR

3. Contrasts

Buenos Aires is recognized by this sophisticated fusion of European imprint and South American passion. The city is a mosaic where all the manifestations and styles fit, from the elegance of its architecture, to the distinctive class of its people molded by the immigrant culture.

Those who visit the city enjoy its contrast and are immersed in it, leaving its mark.

Buenos Aires combines popular culture and sophisticated culture, traditional and modern, ancient religions and modern idols.

Buenos Aires with its squares and its museums offers great attraction to walk it by day, and at the same time an unbeatable nightlife offer.

Figure 3.6 City of Buenos Aires – Food and Culture



Source: Flickr. Courtesy from ENTUR

Target Segments

Form the communication perspective, the main target segments are:

1. Leisure Tourism
2. MICE Tourism
3. LGBTIQ Tourism
4. Luxury Tourism
5. The Tourism Industry

Stakeholder Engagement

The tourist positioning and promotional strategy is based on the involvement and participation of key actors both at the city level and at the country level, including, among other, the citizens; hotels and hotel associations; investors, developers; local and foreign celebrities; airline companies; millennials, media; the City, Province and National Governments, etc.

Figure 3.7 Source markets by Market Potential Index



Source: ENTUR. Strategic Tourism Plan 2016 – 2019

Main Target Markets

From ENTUR they want to promote the City of Buenos Aires as a tourist destination to markets determined by the 'potential tourism index', with specific messages according to each segment.

The main 10 markets determined by ENTUR, based on the Market Potential Index developed by ENTUR are China, the United States, India, France, Colombia, Mexico, New Zealand, United Kingdom, Spain and Peru.

Destination Promotional Strategy

ENTUR mission from the promotional perspective is:

- Duplicate growth of tourists
- Capture new markets
- Strengthen current markets
- Promote and disseminate the city's new offer by coordinating work with the private sector

The vision is:

- To be referents and leaders in the creation, management and execution of innovative plans and programs.
- Align to the strategies of the Ministry of Modernization, Innovation and Technology of the City, and the Ministry of Tourism of the Nation.
- Position Buenos Aires among the 10 most attractive and competitive cities in the world.

The promotional strategy is structured by key target geographical markets (national, regional and international markets) and by target segments (MICE, LGBTIQ, Shopping, Medical and Social Tourism).

The expected high level results from the tourism positioning and promotional strategy from Buenos Aires¹⁴ are to position BA as a desired tourist destination among the strategic markets, increase spending and average length of stay in the city and be known under the idea around the 'passion of its citizens'.

Other tactical and operational results are to enhance tourism opportunities in the different neighbourhoods, promote tourism as a job generator, attract high quality hotel investment to the city and position Buenos Aires as a top-class quality destination, as well as being more efficient in attracting international tourism and reduce dependence on Brazil tourists.

Some of the strategies included in the promotional strategy have developed new touristic itineraries for the different segments (combining Buenos Aires with other destinations in the country), have incorporated technological advances in the tourism communication and promotion and are making sure that citizens see tourism as beneficial for them and for the city.

With regards to MICE, each year ENTUR and the Buenos Aires Convention and Visitors Bureau (BAC & VB) participate in the main international fairs of the MICE segment, to spread the services and facilities of Buenos Aires as a tourism destination

Since the arrival of the new team in ENTUR at the end of 2015 and the beginning of the implementation of the new tourism strategy, the city has managed to increase the volume of international tourists and, for the first time in 5 years, increase the arrivals of tourists from the US and Canada.

With regards to reports and analysis, the GD of Market Intelligence and Observatory develops a series of research and analysis of all kinds to evaluate the evolution of tourism in the city and help in the definition of strategies and tourism offer. It also develops benchmarks in different areas.

Communication and PR Channels

Buenos Aires promotes its tourist offer and products through different channels:

¹⁴ ETBA Tourism Plan 2016 – 2019

Travellers

- Digital Platforms (<https://turismo.buenosaires.gob.ar/es>) and Social Media (@travelbuenosaires): social media strategy, performance advertising, interactive ecosystem, travel industry online market, organic positioning.
- Press Platform: direct relation with media, PR & influencers, press trips, activations, etc.
- Activations: i.e. Promotional campaign in the USA ('Porteños, the most passionate people')

Industry

- Digital Platform: social media strategy, travel industry online market, organic positioning.
- Press Platform: Relation with media from trade and MICE (through alliances with European and USA Agencies), exclusive activations.

Tourist assistance and Tourist Information Centres

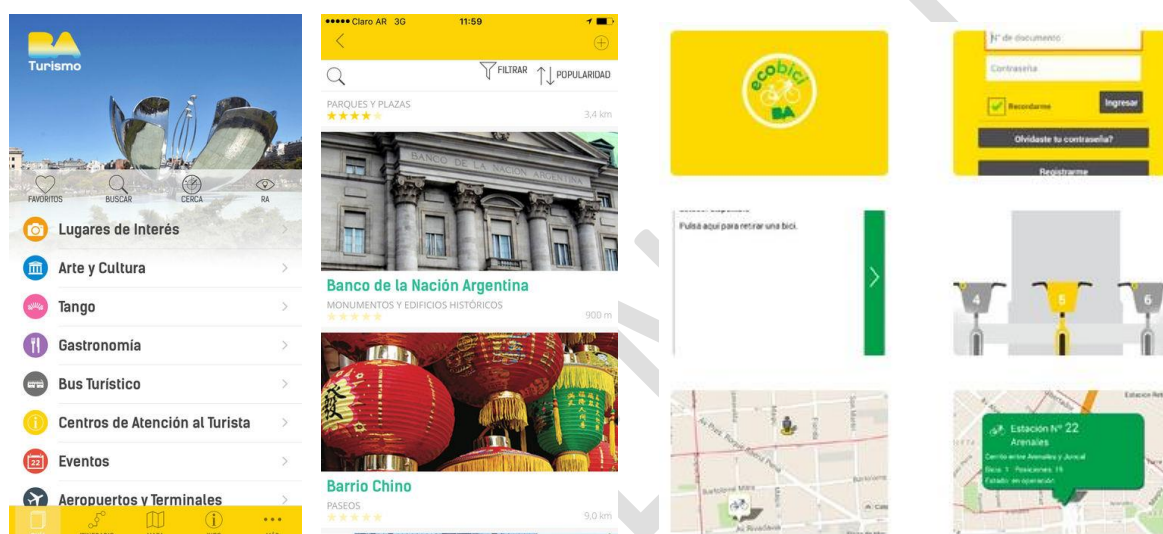
The City of Buenos Aires counts with tourist information centres to provide visitors with information and recommendations about Buenos Aires and its attractions. There are eight of them located around the city (Florida Street, San Martín Square, Recoleta, Puerto Madero, Retiro, Caminito, Planetario and Aeroparque).

The city also counts with different free apps to help tourist get the most of the city, including:

- 'BA Turismo', an indispensable tool to know Buenos Aires, with more than 400 points of interest, an interactive map, recommended itineraries, geolocation and augmented reality;
- 'BA Cómo Llego', to help tourists find out how to get from A to B in the city, whether on public transport, by car or on foot;
- 'BA Wifi', to access to free WiFi hotspots all over the city, in parks, on the underground system, and other environments;
- 'BA Móvil', to keep you updated on the transport situation in real time on your smartphone;

- 'BA Ecobici', a mobile application for all bicycle users in the city mapping out bicycles lanes and showing locations and availability of city bikes for hire on the city's free Eco-bici system and
- 'BA Subte', to check the state of the underground metro system in real time, including alerts on delays and service interruptions.

Figure 3.8 Tourist apps – BA Turismo / BA Ecobici



Finally, through 'BA Tours' ¹⁵, the official online store of Tourism of Buenos Aires, visitors can buy - with credit or debit card - more than 200 activities and experiences to live the city in the best way and in an agile and safe way.

Performance measurement and monitoring

The Directorate General of Market Intelligence and Observatory is responsible for market intelligence and research and produces different kind of surveys, research initiatives and periodical reports to analyse Buenos Aires tourism performance and to provide insights and market intelligence for strategy review and formulation.

For 2017, the DG plans to produce different surveys, research and reports including, among others:

- Monthly report of tourism indicators.

¹⁵ <https://www.ba.tours>

- Report on international markets (IPT).
- Annual report on MICE tourism 2016.
- Annual report on international congresses ICCA 2016.
- ENTUR BA Yearbook.
- Tourism projections by market.
- Bus Touristic survey 2016.
- Tourism reports by segment.
- Other.

A.2 Visitor satisfaction

At present, the Tourism Research Department at ENTUR carries out a series of surveys in which it analyses, among other aspects, the degree of satisfaction of the visitors and the frequency of the visits to the city.

Specifically, in its periodic surveys, the Tourism Research Management analyses aspects such as repeat visitation, visitor satisfaction with different elements of the destination and visitor satisfaction with the overall experience at the destination.

In addition, in surveys developed in the 3, 4 and 5* hotels and in tourist apartments, some questions such as the willingness to come back to Buenos Aires and on frequency of visit are included.

Finally, questions regarding their willingness to recommend visiting Buenos Aires are included on cruise surveys that spend at least one night in Buenos Aires, in meetings held in Buenos Aires (more than 1,800 a year), in The Tourist Information Centres (TICs) around the city and at the tourist buses.

B. Social and Cultural Perspective

B.1 Attractions

Performance criteria	Value	Year of Analysis	Source
Number of cultural resources/attractions (i.e. theme parks, museums, operas, theatres, fairs & local traditions)	3 Thematic Parks, 150 Museums, 5 Opera Houses, 287 Theatres, 400 Libraries, 3 Consolidated Traditional Fairs	2016	Directorate General of Market Intelligence and Observatory. Ente de Turismo
% of municipal budget allocated to culture	N/A		
conservation / enhancement of the cultural attractions (investment into refurbishing and/or building new attractions)	N/A		
% of local heritage in need of improvement (<i>criteria for sustainable cities</i>)	N/A		

As of 2016, the number of cultural resources / attractions in Buenos Aires was:

- 3 Thematic Parks (Tierra Santa, Museo de los niños, Ecoparque).
- 150 Museums.
- 5 Opera Houses (Teatro Colón, Teatro Avenida, Teatro Coliseo, Teatro Picadero, Teatro Ópera Alianz).
- 287 Theatres.
- 400 Libraries
- 3 Consolidated Traditional Fairs (Feria de Mataderos, Feria de Antigüedades Mercado de San Telmo, Feria de Antigüedades Mercado de las Pulgas) apart from hundreds of itinerant trade fairs of social interest, of responsible consumption, artisans, manualists and booksellers ¹⁶

Figure 3.9 Cultural Resources and attractions (El Ateneo Library / Teatro Colón)



Source: Flickr. Courtesy from ENTUR

¹⁶ <http://www.buenosaires.gob.ar/ambienteyespaciopublico/mantenimiento/feriasymercados/ferias>

B.2 Events

Performance criteria	Value	Year of Analysis	Source
% of business events (conferences, corporate meetings, etc.)	1,198 events, of which 1,063 (89%) correspond to congresses and conferences (category that includes: congresses, conferences, symposia, seminars, forums, conventions, workshops, etc.). 199 (19%) international	2016	Directorate General of Market Intelligence and Observatory + Directorate General of Promotion / MICE. Ente de Turismo
% of leisure events (festivals, sporting activities, etc.)	23 International Sports Events and 8 Cultural Festivals	2016	Directorate General of Market Intelligence and Observatory + Directorate General of Promotion / MICE. Ente de Turismo
The percentage of growth in terms of interest for hosting the events in the city – trend over the past 5 years	N/A		
The percentage of growth in terms of event visitation	25% (2016 with respect to 2015)	2016	Directorate General of Market Intelligence and Observatory + Directorate General of Promotion /
% of the events that are focused on traditional/local culture and heritage	24 (2%) are related to traditional / local culture and heritage (Tango, Art, Gastronomy, Football, Livestock and 'Gauchesca' Culture).	2016	Directorate General of Market Intelligence and Observatory + Directorate General of Promotion / MICE. Ente de Turismo

The City of Buenos Aires organizes and hosts numerous events of all kinds during the year.

At present (data for 2016), the MICE calendar of the city has 1,198 events, of which 1,063 (89%) correspond to congresses and conferences (category that includes: congresses, conferences, symposia, seminars, forums, conventions, workshops, etc.).

Of the conferences and conferences identified, 199 (19%) are international. This means that they have international rotation and are International Congress and Convention Association (ICCA) events (87 to date) or are undergoing analysis and / or validation by ICCA. The rest, 864 events (81%), are of national rotation.

The Calendar includes, in turn, events that are not MICE but which have a wide audience and receive foreign audiences, including 23 International Sports Events and 8 Cultural Festivals. Here the rotation is not considered, but the participation of foreign tourists

Figure 3.10 City of Buenos Aires – Sports Events



Source: Flickr. Courtesy from ENTUR

The % of growth in terms of event visitation was:

Table 3.1 Event visitation in Buenos Aires

Congresses & Conventions	2016	2015	IAV
Total Participants	514,671	643,801	25%
International participants	51,990	69,737	34%
National participants	128,891	152,672	18%
Local participants	333,790	421,392	26%

inter annual variation of attendees to business events (category Congresses and Conventions with headquarters in CABA that include: symposia, conferences, seminars, etc.)

Source: ENTUR

Of the Calendar of events mentioned, 24 (2%) are related to traditional / local culture and heritage. The main themes in this aspect are: Tango, Art, Gastronomy, Football, Livestock and 'Gauchesca' Culture.

Buenos Aires will host the Youth Olympic Games in 2018. The city prepares its infrastructure to welcome young athletes from all over the world, in what will be one of the most important sports activities of the decade.

The different Olympic disciplines will be developed in more than 30 establishments in the city. Among them, they will have a fundamental role the Monumental and the Bombonera, the legendary stadiums of the River Plate Athletic Club and the Boca Juniors Athletic Club, respectively.

B.3 Community Engagement

Performance criteria	Value	Year of Analysis	Source
% of population that participates in the community engagement programs (civic pride, volunteers, ambassadors, local buddies, etc.)	N/A		
% of the employees in direct tourism employment who are local	N/A		

Although data of community engagement measured as a % of population that participates in the community engagement programs - civic pride, volunteers, ambassadors, local buddies, etc. is not available, there is a Volunteer Program that depends from the 'Directorate General for Strengthening Civil Society' whose main objectives are:

- Promote citizen participation through social volunteering in the City.
- Promote within the institutions of the Government of the City of Buenos Aires the creation of Volunteer Centres.
- Train, professionalize and prioritize voluntary work.
- Encourage and strengthen the work of Civil Society Organizations (CSOs) in voluntary management.
- Promote the networking of both volunteers and CSOs who work with social volunteers.
- Recognize the value of volunteering in contributing to the re-composition of the social fabric.
- Promote inclusive and participatory volunteering.
- Promoting through volunteering the commitment to building a more just and equitable society within the framework of a culture of solidarity.

The recipients of this program are:

- Direct recipients: persons interested in exercising active citizenship.
- Recipients of the tasks of volunteers: people who find their rights violated, such as girls, boys and adolescents at risk; adults in households in poverty; victims of gender violence, etc.

Two other relevant initiatives for citizen engagement are the 'Mi Barrio' project, already mentioned in this report and described extensively in the 'Authenticity' area, as an initiative to

promote tourism within the different districts and neighbourhoods of the city through citizen consultation exercises, as well as the 'Vamos Buenos Aires campaign', developed by the City government to engage citizens to improve and promote the city and to generate sense of pride and identification.

B.4 Gender Equality

Performance criteria	Value	Year of Analysis	Source
% of men and women employed in the tourism sector	54,1% of employees in hotels and gastronomy (RCT) in the City of Buenos Aires are men and 45.9% are women	2016	'Encuesta Permanente de Hogares' (Indec)
% of tourism enterprises where the general manager position is held by a woman	N/A		

As of 2016, 54.1% of employees in hotels and gastronomy (RCT) in the City of Buenos Aires are men and 45.9% are women¹⁷.

B.5 Inclusion

Although no specific indicators have been provided, social inclusion is a priority for ENTUR and for the City of Buenos Aires. When the new city government came to power, one of the main priorities was to create a city that provides equal opportunities for all its citizens, and a city that recognizes and values individual characteristics and needs. The objective is to build an accessible and friendly city.

Buenos Aires, the City of All Argentines, is one of the most popular destinations for tourists from all over the world. It is, therefore, essential to work on improving the quality of life of all of the visitors through equitable and accessible tourism.

Accessible tourism benefits everyone. More people enjoy the opportunity to travel and the city gets more visitors, longer seasons and new incomes. Society as a whole benefits from new job opportunities, more tax revenue and an accessible environment for local communities and visitors.

¹⁷ Permanent Household Survey (Indec) 2016

The city keeps on working on new projects so that an increasing number of travellers from around the world can enjoy the city to the fullest and on an equal basis.

COPIDIS, the Commission for the Full Participation and Inclusion of Persons with Disabilities that promotes their rights, including equal opportunities, access to work and education, and independent living, works together with ENTUR to develop new initiatives for Buenos Aires to be recognized as the most inclusive city in Latin America. This initiatives include, among others, he 'Accessible Tourism Guide, which gives priority to information on accessibility over the history of our city, and has been organized by circuits to make it more understandable and readable including maps and pictures to facilitate locating and identifying places of interest; the Accessibility Guide for Tourist Accommodations or the Accessible Tourism Best Practices Manual, a tool to raise awareness and train the different stakeholders that work directly or indirectly in the tourism sector.

Figure 3.11 Buenos Aires accessible tourism



Source: Accessible Tourism Guide 2016 ETBA

The objective of the City of Buenos Aires is that all people can enjoy the city in equal conditions. The 'indicators of accessibility' indicate places prepared for people with motor, visual, hearing, intellectual and visceral disabilities.

Good examples are the initiatives at the level of development, culture and tourism in terms of accessibility, within the 'Microcentro Plan', designed to hierarchize the Microcentro through interventions that distinguish substantially the quality of life of the citizen.

B.6 Safety and security

Safety and security are of high importance for tourism development in Buenos Aires. Although no specific data for the selected indicators have been provided, the City of Buenos Aires is working to improve safety in the city in general and in the most problematic areas in particular.

With regards to tourism security Buenos Aires has a 'Tourist Police Station' (*Comisaría del Turista*) specially dedicated to attend tourists in aspects related to safety and security.¹⁸

The City Attorney has heat maps of crime information but information is limited to complaints received by the Office.

B.7 Authenticity

Performance criteria	Value	Year of Analysis	Source
Is your destination leaning towards neighbourhood tourism or built artificial tourist quarters "touristification"?	Yes, neighborhood tourism (Mi Barrio project)	2016	Directorate General of Market Intelligence and Observatory. Ente de Turismo
Please elaborate on tourism product authenticity at your destination (e.g. gastronomy, local culture & traditions)	Food (Meat, Pizza, Other tradicional), Sports (Polo, Football), Local Traditions, Fairs, Markets, Music (Tango), Literature, other	2016	Directorate General of Market Intelligence and Observatory. Ente de Turismo

Buenos Aires is promoting the destinations though the idea or brand concept 'many passions'. This idea is linked to the authenticity related both, the character of its citizens and the way they live and approach different aspects of their city.

Buenos Aires is a pulsating cosmopolitan city and a place of many passions. The combination of rich architectural and cultural heritage, modern creative energy, electric nightlife, unique traditions, a vibrant arts scene, extensive parks and open spaces, and warm, friendly people makes it one of the world's most exciting capitals.

The city its promoting end enhancing its attractiveness based in its authenticity and unique offering and attractions, including its heritage, food, open air, sport, tango, culture, design and style, nightlife, etc.¹⁹

¹⁸ <https://turismo.buenosaires.gob.ar/es/article/seguridad>

C. Other key performance areas

C.1. Environmental perspective

Buenos Aires is a city committed to the environment. For this, it has a wide range of public spaces and green areas, among which are parks, natural reserves and plazas. In addition, it offers sustainable mobility and accommodation and healthy gastronomy.

In this sense, the city also encourages sports and an infinity of outdoor activities.

Today Buenos Aires has a system of cycle paths that connects almost all points of the city.

The Environmental Protection Agency, under the Ministry of Environment and Public Space, is responsible for environmental sustainability issues. The agency works on the development of an 'environmental quality index', made of 12 different indicators, and aspects such as the monitoring of water quality and the survey of contaminated sites in the city (odours, noise, pollution, etc.) and generates certificates of environmental impact attitude.

In its first year of management after the change of government in the city, the Agency, as of today, has developed:

- A Climate Change Plan (updated last year with 2030 vision).
- Contingency plans.
- A Biodiversity Plan (north and south coast).

The Agency also has as its mission to influence all the designs of the green spaces of the city.

Other relevant programs promoted by the Agency include, for example, the CREAS Building Support Program. The program includes aspects such as:

- Responsible consumption.
- Sustainable public procurement.
- The management of urban and essential solid waste.
- Energy efficiency.

¹⁹ <https://turismo.buenosaires.gob.ar/en/article/buenos-aires-city-many-passions>).

- The hydraulic footprint.
- The carbon footprint.
- Safety, health and sustainable mobility.
- Other

Another relevant program is the 'Producción más limpia' (P+L) program, providing free consulting support to companies (up to date more than 140 companies).

Also, the 'Sustainable Construction' program, together with the Municipal Institute for Housing ('Instituto Municipal de la Vivienda'), with the aim at influencing the code of edification and urbanism.

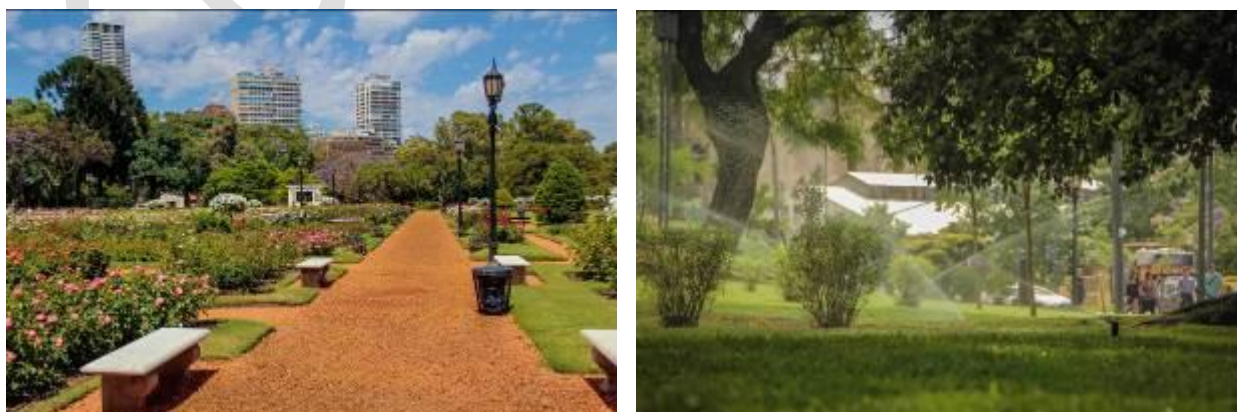
Among the innovation and development programs, the agency is developing a pilot project in the north reserve on 100% self-sustainable construction.

In the area of internationalization, the city has designed a strategy to position Buenos Aires in the field, developing collaboration agreements with resilient cities and being present in international city rankings.

- **Public green spaces**

With regards to public green spaces, as of 2015, Buenos Aires had 1,188 public spaces, including parks, gardens, quarries and squares ²⁰.

Figure 3.12 Public green spaces in Buenos Aires



²⁰ 2015 CABA Statistical Yearbook

31.5% of total land area was preserved areas / reservoirs / waterways /parks ²¹ according to the following detail:

- 353 ha Reserva Cost. Sur.
- +8 ha Reserva Cost. Norte.
- +36 ha Reserva Ec. Villa Lugano.
- +39 ha Parque Avellaneda.
- +130 ha Parque 3 de February.
- +1,4 ha Plaza de May.
- +1,5 ha Plaza Congreso-Plaza Mariano Moreno-Plaza Lorea.

Total 568.9 ha / 1807,8 ha total.

The city had a total of 424,439 trees distributed in 203.3 km² (2,087 trees / km²) and the % of green space (public parks) coverage in relation to city population was 5.9 m² / hab. ²².

It is estimated that 25% of public spaces need to be upgraded.

The main strategies of the General Direction of Green Spaces (DGEV) are:

Objective	Strategy
Increase positive attributes around Green Spaces	<ol style="list-style-type: none"> 1. Irrigation, parkings and playgrounds 2. Incorporating aerobic stations, drinking fountains, fountains, cultural events, games for teens and seniors. 3. Incorporation of native plant beds

²¹Data from DGEV- MAYEP

²²Statistical Yearbook 2015 CABA

Improve accessibility	<ol style="list-style-type: none"> 1. Replacement of pellets by draining soles 2. Incorporation of furniture adapted for people with reduced mobility and / or older adults. 3. Incorporation of games and flooring accessible for children with reduced mobility.
Increase the number of Green Spaces	<ol style="list-style-type: none"> 1. Bill related to vacant inheritances to create educational green spaces (in negotiations). 2. Survey of disused / sub-used spaces to create green spaces (service stations, city and national government properties, etc.). <i>For example, a new park of 3 ha has been created</i>
More equitable distribution of Green Spaces	<ol style="list-style-type: none"> 1. Careful survey of communes with the greatest lack of green space per inhabitant to locate potential land to create green spaces.
Increase the number of trees	<ol style="list-style-type: none"> 1. Plan of trees 2017-2019. Two stages making a total of 40,000 trees throughout the city.

Prioritize green coverage	<ol style="list-style-type: none"> 1. Premise to incorporate the largest amount of green space into new and value-added works. 2. Remove walls as much as possible and replace them with grates with vegetation.
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The main directives are:

- At the City Government level, it is planned to create 110 ha of new green spaces and renovate another 150 ha.
- New priority green spaces in areas with deficits, more distributed in the space with the aim that each neighbour has a green space to no more than 300 m.

C.2. Mobility

Buenos Aires has all kinds of means of transportation to reach the desired destination.

The implementation of the Metrobus or the Ecobici system ²³ in the last years have had a positive impact on mobility in the city as well as in reducing environmental impact.

However, traffic and mobility in general remains a pending issue, including the need for a quick connexion to Ezeiza international Airport.

C.3. Technology & New Business Models

Within the Ministry of Modernization, Innovation and Technology of the Government of the City of Buenos Aires, there is an under secretariat of Intelligent City, which, in turn, has a General Directorate of Innovation and Autonomous Government, which is in charge of developing technologies, platforms and applications related to different aspects of the city,

²³ (www.buenosaires.gov.ar/ecobici)

including applications to promote the collaborative economy from the Government or aspects related to smart city, internet connectedness, open data or online government services.

- **Collaborative economy**

As far as the collaborative economy is concerned, it exists in Buenos Aires and is used. There is no such thing as a strategy, but there is an attempt to modernize the laws to accommodate creative and collaborative economies.

There are some applications developed by the Innovation DG itself, such as the Ecobici application, developed for the Tourism and Transport Entity, for the public service of shared bicycles (bike sharing) and with about 1,000 bicycles in circulation.

- **Smart city**

At Smart City level, Buenos Aires currently has 4.5 open Wi-Fi spots per km², as well as 200 installed sensors corresponding to the river network.

It also has a Single Coordination and Control Centre (CUCC), armed with state-of-the-art technology that allows coordinating and quickly respond and in an integrated manner to the agencies in the event of casualties, catastrophes, floods, police incidents or health emergencies.

Finally, the commitment of the government of Buenos Aires to be linked to technology management projects will turn the Autonomous City of Buenos Aires into the headquarters of the "Smart City Expo" in September 2017, an event that would bring together experts in urban development, and managers who seek to make the metropolis of the 21st century a more humane place. The event, which will be the first of its kind in South America, will be held at the city's new Convention Centre.

- **Internet Connectedness**

The number of internet connections per 100,000 population is 28,000, the % of internet-connected households is 5% and 20% of residents have smartphone access.

The % of commercial and residential users with internet download speeds of at least 2 Mbit/s is 50% while the ones with at least 1 gigabit/s is 1%.

- **Open Data**

With regards to open data, the number of mobile apps available (iPhone) based on open data are 6: Biciplus, Donde?, Localizar Emergencia, Me voy en bici, Cruz Roja Argentina and AllGreenUP.

There is an official citywide privacy policy to protect citizen data based on:

- Decree 156-12 Data Transparency.
- Decree 478-13 MMIT in charge of information and data about citizens.
- The Privacy Policies that are ruled by the laws from the Argentina Republic.

Further information can be found in <http://www.cpdp.gob.ar> where we can find the applicable regulations.

- **Government Services**

The number of government services that can be accessed by citizens via web or mobile phone is about 270 procedures through <http://www.buenosires.gob.ar/tramites/tad>.

The main electronic benefit payments available to citizens are:

- Fines – ABL – Patents – Driving Register.
- General Directorate of Works and Cadastre (DGROC)
 - Certificate of Conformity
 - Heliographic Copy of Plans
 - CEP Procedure
 - CEP Registry
 - 'Carnet de Foguista'
 - Certificate of request for cadastral data (Form: 3100)
 - O Testimonial Certification

- Ecoparque sub-products.
- Transfer outside Jurisdiction C.A.B.A. Licenses.
- Matches of Death or Birth Matches.
- Burial or Cremation License.
- **Public Transport** ²⁴

With regards to public transport, here are 2,715 traffic controllers in the city.

The public transit services that offer real time information to the public: 1 point for each transit category up to 5 total points (bus, regional train, metro, rapid transit system (e.g. BRT, tram), and sharing modes (e.g. bike sharing, car sharing) are:

- 'Subte' (screens in platform)
- Ecobici
- Bus (in process)

Existing mobile app for public transport (e.g. purchase tickets, schedule and map of all public transport services) are:

- USIG: app "cómo llego", availability for public transport.
- SubteBA
- Ecobici

²⁴ Data from the General Directorate of Innovation and Autonomous Government

IV. Showcase: Best Practice Examples

- **The 'Mi Barrio' project**

The Directorate General of Market Intelligence and Observatory at ENTURA implemented in 2016 an applied research project called 'Mi Barrio', an applied research project consisting on an x-ray of the districts of Buenos Aires through the eyes of the neighbours and the multidisciplinary research team that went out into the streets, in order to capture each neighbourhood's identity, so as to redesign and revalue touristic routes and identify new opportunities.

Figure 4.1 Mi Barrio project



Source: MI Barrio project. ETBA

Specifically, the objectives of the Mi Barrio project were:

- Understand and describe the identity of the studied neighbourhoods from the citizens and referents' perspective.
- Obtain information that permits the generation of original proposals with a differential value in each neighbourhood.
- Redirect the touristic flow to cold areas, enabling new commercial businesses and decongesting overexploited areas.

The research analysed the districts' history and traditions, their urban configuration and aspects related to tourism (main arteries, walkability, accessibility, among others), gastronomic initiatives and unique services and places, always with the objective of showing a genuine city, open to the world without filters. It aimed at getting to know the neighbours' profile, more specifically, their values and behaviour patterns, by means of focus groups and interviews to the districts' main referents and opinion leaders.

The research worked in the following 20 neighbourhoods of the City of Buenos Aires, taking into consideration that the 15 communes that make up the city were represented by at least one neighbourhood. A selection was made according to the exhibition and tourist exploitation of each neighbourhood:

Figure 4.2 Neighbourhoods covered by Mi Barrio research project

San Telmo	Barracas	Flores	Saavedra
Montserrat	Parque Patricios	Villa Soldati	Colegiales
San Nicolás	La Boca	Mataderos	Palermo
Recoleta	Almagro	Floresta	Chacarita
Balvanera	Caballito	Villa del Parque	Villa Crespo

Source: MI Barrio project. ENTUR

The research was based in qualitative and exploratory approach, through the implementation of the following techniques:

- Desk research of successful initiatives in other touristic destinations.
- 30 focus groups with neighbours – both young and adults.
- 46 in-depth interviews to key informants.
- Ethnographic observations (synchronous in situ and asynchronous in documental sources).
- 45 days of photograph taking.

The field work (information collecting) took place between April and September 2016.

From the results of Mi BArrio each neighbourhood analysed was presented as an area with tourist potential in the short, medium or long term. It identified needs for the value of the supply, particular features for the creation of new routes and possibilities of transversal tourist routes.

As more and more tourists seek to live native experiences, it is the neighbours who keep alive the identity and culture of this neighbourhood and know, better than anyone, the places of

interest and speeches that could serve to summon tourists and expect state support in the value of the offer.

The neighbourhood continues to be an element that gives identity to both the city and its neighbours, and is an aspect that, installed in the imaginary of Buenos Aires and those who frequent Buenos Aires, is still alive and with potential to continue contributing to add value to the tourist offer of the city.

The information obtained in the Focus Groups and in the in-depth interviews was classified into two main categories: referential and subjective.

The mentions that the neighbours make about their environment operate as a sign of the neighbourhood "from" the everyday life, which allows rebuilding their point of view and the construction of meaning from their usual link with their neighbourhood.

The reference mentions had to do with:

- A. History of the neighbourhood, in general, or specific places, i.e., mention of milestones linked to the past of the neighbourhood and the history of the country.
- B. Places and events: mentions of sites and moments of tourist attraction.
- C. Culture: mentions of films, books, or characters of the culture related to the neighbourhood.

On the other hand, the subjective mentions related to:

- A. Emotionality: expressions that connote attitudes and affections related to the neighbourhood.
- B. Borders: expressions referring to internal and external divisions found in the neighbourhood.
- C. The metaphors: connotative expressions that associate with the neighbourhood.

From the spontaneous comments collected during the field work, relevant aspects according to the perception of the neighbours was also recorded, with the following variables arising such as security, cleaning, connectivity, control of public space (keep, Houses taken, etc.), graffiti on walls. This information also allowed understanding the degree of belonging and

esteem that the neighbours have with respect to their neighbourhood. The research also assessed the neighbours' willingness to receive more tourists in their neighbourhoods.

The proposals that arose from Mi BArrio research seek to protect the social and cultural identity, as well as the cultural and natural heritage in each neighbourhood following the UN Global Code of Ethics for Tourism.

The Mi Barrio project is a tangible proof that Buenos Aires City is a destination that favours authentic and neighbourhood tourism in opposition to built artificial tourist quarters – 'touristification'.

Figure 4.3 Images Mi Barrio research project



Source: ENTUR

The mission and vision of the Directorate General of Market Intelligence and Observatory at ETBA, both in this project and in other initiatives that are being developed, is aligned with the purpose of the Ministry of Modernization, Innovation and Technology, which has two axes of action: sustainable economic development and innovation to build the Buenos Aires of the future close to the neighbours.

The project has helped to identify intervention areas that need social, urban, economic and touristic improvements, boosting this way social inclusion, commercial and touristic entrepreneurship and sustainable development. Also, it has permitted an identification of the overexploited areas that can be decongested, redistributing benefits and improving the functioning of the destination as a whole.

For the very first time, the local tourism entity talks to the neighbour treating them as the city host. This is essential, considering that there is a growing interest in tourists for authentic

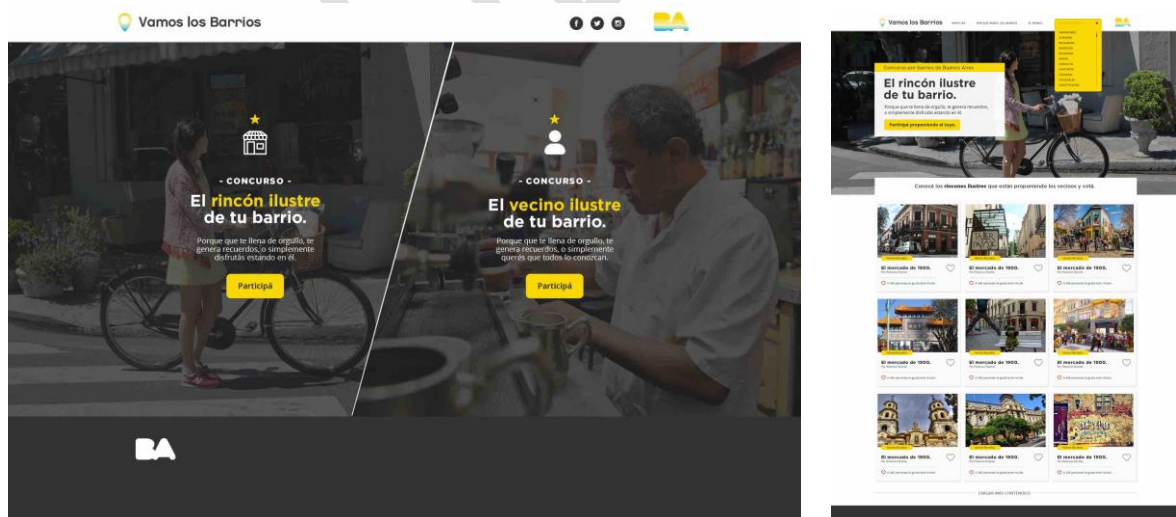
experiences and it is precisely the neighbours who keep alive the local identity and culture and know, better than anybody else, the places of interest and the stories that might seduce tourists.

From the results of the field work, relevant information has been provided to different government areas, even though the main addressee was ENTUR itself (Promotion, Communication and Supply Development).

Among some of the immediate actions that resulted from the research, the following can be mentioned:

- the extension of the route of the Touristic Bus to Palermo neighbourhood
- the opening of a Tourist Attention Centre in San Nicolás neighbourhood
- the elaboration of an intensive plan on the cleansing of places vandalized with graffiti and the development of a citizen participation platform called 'Vamos los Barrios' (98% finished) that will be used to stimulate local participation in different topics through contests and voting. The first topic will be entrepreneurial neighbourhoods.

Figure 4.4 'Vamos los barrios' platform



Source: ENTUR

The obtained information was also used by the communes' authorities, vendors, entrepreneurs and academics.

A specific report was built per studied neighbourhood with recommendations for the different addressees, with specific projects in terms of neighbourhoods' boost and urban intervention.

A good example is the one developed for Mataderos neighbourhood, which includes an integral proposal on the *criollo* tour in Mataderos.

Figure 4.5 'Mataderos project plan



Source: ENTUR

Considering the imminent move of the Mercado de Hacienda (Farm Market) and the results of this research, the ETBA together with the Ministry of Urban Development and the Undersecretary of Welfare have elaborated a project that aims to revalue the *criollo* / *gaucho* identity through the establishment of a cultural and gastronomic pole that:

- Optimizes the already existing handicraft market.
- Promotes shows on *gaucho* skills.
- Strengthens and expands the local gastronomic offer: 'parrillas' (grillrooms) and restaurants.
- Offers professional workshops for neighbours.
- Recovers the public space of the park (Parque Alberdi).

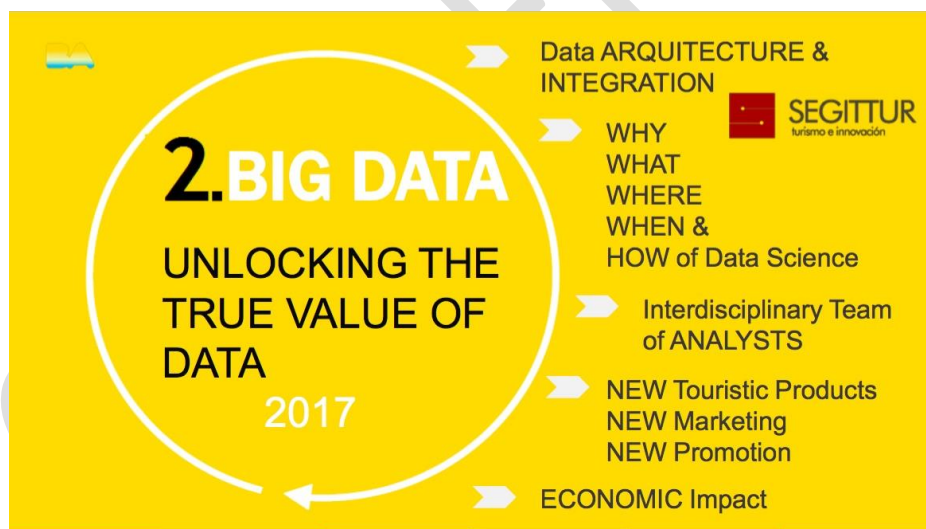
It has to be emphasized that the activities held there did not answer to sanitary, legal, animal protection or care for the public space parameters and, as a result, a need of an integral project that reorganizes and boosts the area has been identified.

- **The Big Data Project**

One of the key initiatives currently being developed by ENTUR is the Big-Data project, that will turn Buenos Aires into the first city of South America with own development of a big-data tool applied to tourism.

ETBA is currently in an advanced stage of the development of a platform of tourist indicators for governmental use, which will provide a wealth of information for strategic decision making and tourism management.

Figure 4.6 'Big Data' project



Source: ETBA

In a first stage the platform will contain data of:

- Amadeus: searches, reservations and purchases of air tickets to Buenos Aires and to competitor cities from a set of selected cities.

- Tourist traffic data: arrival and departure of travellers, divided by hikers and tourists, according to gender, age group and access route.
- International Tourism via the International Tourism Survey (ETI): the platform will contain the microdata base to be able to carry out all kinds of consultations on international tourism beyond the regular indicators published by ENTUR.
- Tourism in Buenos Aires via the survey in Tourist Assistance Centres (CATs): information collected on people who consult in tourist assistance centres (there are 9 in Buenos Aires) and in which, through a probabilistic sampling in each CAT, extended surveys are conducted allowing to know neighbourhoods and type of accommodation, means of arrival to Buenos Aires, etc.
- Accounting of national and international tourists through events recorded between antennas and mobile phones: this will provide data on the distribution of tourists in 166 areas of Buenos Aires, by day of the month, time zone, gender and age group. This information will be gathered for 2015, 2016 and 2017.
- Analysis of prices and hotel quality, with analysis of feelings included via data mining: statistics on price evolution according to travel forecast (6 months, 4m, 2m and 1m) will be being developed, always comparing with other cities in America Latina.
- International students: the universities will load their statistics on international students in Buenos Aires and a brief description of their socio-demographic characteristics and their study program. The universities and ENTUR will have access to that information.

At the general level, this implies a great deal of work in terms of data integration from non-proprietary data bases (this means to know in detail all the information they provide as well as their advantages and methodological limitations) and revaluation of bases for those statistics generated from ENTUR (quality analysis of all the information they contained and monitoring of data collection processes).

V. Challenges and Recommendations

The change of government at the Nation level and the consequent initiatives to 'reinsert' Argentina in the international community, as well as the new impulse of tourism by both the Government of the Nation and the Autonomous City of Buenos Aires are undergoing, may have a positive impact for tourism development in the country and the City of Buenos Aires. This process is, however, slow and will take time, and its results should be evaluated in the future.

Buenos Aires faces some key challenges in order to consolidate the city as one of the top international destinations in the region.

Among these main challenges, we can point out:

1. Guarantee medium / long term political stability.
2. Improve connectivity and mobility (with the international airport and within the city).
3. Increase safety and security (in general in the city and in specific areas and districts).
4. Improve the quality of tourism services and infrastructures.
5. Improve affordability in terms of costs and prices (hospitality and services).
6. Consolidate current tourism promotional strategy.
7. Pay attention and manage emerging tourism business models (including sharing economy)

APPENDIX 1 – FIELD WORK AND SITE VISITS

A visit to the City of Buenos Aires was made in March 2017 in order to undertake site visits and interviews with key stakeholders.

Interviews with City Stakeholders in Buenos Aires

1. Gobierno de la Ciudad (CABA)

Ente de Turismo de la Ciudad Autónoma de Buenos Aires

Mariana Mangiarotti - Directora General Inteligencia de Mercados y Observatorio.

Mariano Lattuca - Jefe de Gabinete. DG Inteligencia de Mercado y Observatorio.

Matías Belacín – Gerente Operativo de Inteligencia de Mercados.

Laura Carlucci - Gerente Operativo de Investigación Turística.

Alfredo Fragueiro - Director General de Comunicación y Oferta de Turismo.

Pilar Santillán – Gerente de Contenidos.

María Guadalupe García Basalo – Subgerente Operativa del Centro de Convenciones.

Karina Perticone – Directora General de Promoción Turística.

Marcela Bayala – Subgerente de Políticas Turísticas de Accesibilidad e Inclusión. Dirección General de Desarrollo y Competitividad de la Oferta.

Sofía Pelaya – Relaciones Institucionales

Ministerio de Modernización, Innovación y Tecnología

Ramiro Corletti – Dirección General de Innovación y Gobierno Abierto. Subsecretaria de Ciudad Inteligente.

Florencia Cambré – Coordinadora de Atención a Empresas del Distrito Tecnológico. Dirección General de Promoción de Inversiones.

Ministerio de Ambiente y Espacio Público

María Carolina Añino – Dirección General de Estrategia Ambientales. Agencia de Protección Ambiental.

Arq. Ariel Iasge – Director General de Espacios Verdes.

María Raggio – Dirección General de Espacios Verdes.

Arq. Melina Poma – Asesora. Dirección General de Espacios Verdes.

2. Other Tourism Industry Stakeholders

Asociación de Hoteles de Turismo de la República Argentina (AHT)

Daniel Gustavo Manzella – Presidente Filial Buenos Aires

Asociación de Hoteles, Restaurantes, Confiterías y Cafés (AHRCC)

Lic. Gabriela Akrabian – Secretaria Cámara Hoteles

Museo casa Rosada

Prof. Juan José Ganduglia – Director

APPENDIX 2 – BIBLIOGRAPHY AND REFERENCES

- Globalization and World Cities (GaWC) Research Network (GaWC)
- Trip advisor 2016
- Latin America's 50 Best Restaurants 2015
<http://www.theworlds50best.com/latinamerica/en/the-list.html>
- Conde Nast Traveller 2013
- City of Buenos Aires Tourism Promotion 2017 Strategic Plan ETBA
- International Congress and Convention Association (ICCA) ranking
- ETBA Tourism Plan 2016 – 2019
- City of Buenos Aires MICE Tourism Guide 2016
- SIPA (Sistema Integrado Provisional Argentino)
- General Directorate of Statistics and Censuses of the City of Buenos Aires
- International Tourism Survey (Encuesta de Turismo Internacional ETI)
- Association of Tourism Hotels of the Argentine Republic (AHT)
- Association of Hotels, Restaurants, Confectioneries and Cafes (AHRCC)
- Permanent Household Survey (Indec) 2016
- Accessible Tourism Guide 2016 ETBA
- 2015 CABA Statistical Yearbook
- General Direction of Green Spaces (DGEV)