

UNWTO/WTCTF City Tourism Performance Research

**Report for Case Study:
“Turin, Italy”**



Note: This document is a working paper

Map of Turin, in Piedmont Region of Italy



Table of Contents

Acknowledgements	i
Foreword	ii
Executive Summary	iii
1. Background information on Turin and its development over past 25 years ...	1
1.1 Location – advantages and disadvantages	1
1.2 History	2
1.3 Turin reinventing itself – the Phoenix rises	4
2. Tourism in Turin	7
2.1 Primary tourism attractions of Turin – overview	7
2.2. Performance Data	11
3. Strategic planning and development of Turin since 1990.....	18
3.1 City Development Plans and their key proposals for enhancing the city environment, economy, infrastructure and tourism	18
3.2 Strategic action for tourism	21
4. Tourism structures and policies	30
4.1 Regional tourism structure and policies	30
4.2 Turismo Torino e Provincia (TTP)	32
5. Project case studies – private sector’s contribution to the development of tourism in Turin	35
5.1 Slow food	36
6. Tourism opportunities and challenges – a continuing journey.....	45
6.1 Overview	45
6.2 Strategic opportunities	45
6.3 Strategic Challenges	46
List of interviewees	47
List of Tables	48
List of Figures.....	49

Acknowledgements

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Foreword

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Executive Summary

Background

Turin is a city of 890,000 people in the north west of Italy. It is in the region of Piedmont, of which it is the capital, and is surrounded by Alpine peaks and wine hills. Turin was founded by the Romans. In the 18th century Turin was the capital of the Kingdom of Piedmont and Sardinia, and, in 1861, became the first capital of Italy. The Savoy kings gave to Turin its unique baroque architecture, more than twenty Royal Residences and chapels which are World Heritage Sites, the initial collection of the Egyptian Museum, the Holy Shroud and a widespread love for culture, art and food delicacies.

The decline and subsequent regeneration of the city since the 1970s

From the 1950s, Turin developed a strong industrial base led primarily by the growth of FIAT. The city population rose and reached its peak of 1.2 million people in the early 1970s. Soon after, the economic crisis hit the car industry. Turin suffered economic and social losses, until the 1990s, when the city council, led by a technocrat, Prof Valentino Castellani, established a strong, broad partnership with public and private organizations, launched the vision of Turin as a city of culture and innovation, bid for the Winter Olympics and implemented a complete transformation of urban areas in the city centre and the peripheries, renovated museums and royal residences, modernized public transports, built the city's first metro line and reutilized disused industrial sites. The transformation of the physical environment and infrastructure of Turin was a catalyst to, and enabled by, the growth of a strong and diversified economy, which ranges from food industries to fashion, design to high technology.

City council strategic plans and policies were successful because of widespread popular support, the direct involvement of stakeholders from public organizations, private sector and the community, and the sense of unity and pride generated by the Winter Olympics. Policies focused not only on urban regeneration, but also on culture, education, research and innovation and they identified tourism as one of the key drivers for economic growth.

Key strategic actions taken to develop tourism

Many major initiatives have been undertaken over the past twenty years that have had significant direct or indirect relevance to tourism. The following is a summary of the most significant actions undertaken, mostly within the framework of the Strategic Plans noted above and with guidance from the city council:

- Development and enhancement of the key museums, Royal Residences and other attractions;
- Cleaning and renovation of historical areas;
- Creation of pedestrian only areas in the city centre;
- Renovation of peripheral areas of need, with investment from national and EU sources;
- Creation of new university and polytechnic campuses with geographical connection to research and innovation centres;
- Completion of the Central Spine project and railway by-pass;
- Construction of the metro line;
- Restructuring of industrial sites used as multi-purposed centres with focus on creating space for incubators, research and training centres, and exhibition and congress areas;
- Creation of extremely successful research centres and incubators for start-ups in the areas of ICT, renewable energy, health and design; these hubs for research and innovation are geographically connected along a corridor to the Polytechnic campus and the financial centre of the city – a strong base for the development of business tourism, including the MICE segments;
- Smart City Master Plan, SMILE – Smart Mobility, Inclusion, Life & Health, and Energy, prepared by the city council in 2013;
- Sustainable mobility through improved public transport as well as car and bike sharing initiatives;
- Improved connectivity throughout the city.

Two major site transformation and reutilization projects are due to be completed by

2017:

- Officine Grandi Riparazioni, used until the early 1990s for the maintenance of railway vehicles, will become an innovation hub and a cultural and art centre, providing space for start-ups, events, exhibitions, performing arts and more;
- Lavazza's new HQ campus 'La Nuvola', will include an interactive museum, exhibition and substantial meetings/conference spaces and a restaurant.

Turin has become the third Italian city destination by revenue from tourism, with over 1.7 million arrivals and 4.8 million bed nights in 2015, a 120% increase over the same values in the year 2000. The importance of tourism for the economic growth of the city is now widely recognized.

Key players in tourism

The key players over the past 20 years and for the future have been and remain:

- The city council;
- The regional council;
- Turismo Torino & Provincia, the city DMO;
- Piemonte Marketing, the regional DMO;
- All major museums and art galleries;
- The Chamber of Commerce;
- Polytechnic and University;
- Private companies and non-governmental organisations, particularly:
 - Compagnia di San Paolo Foundation and CRT;
 - La Consulta for the preservation and development of artistic and cultural heritage of Turin;
 - Exclusive Brand Torino and its members;
 - Slow Food.

Looking forward

Turin has gone through a dramatic transformation over the past 20 years, making the city a much more attractive place to live and work; creating a more diverse, healthier economy; and affirming itself, internally and externally, as a city of culture and a highly attractive and interesting tourist destination. But the task is not complete; the journey must continue. The city has continuing needs for economic and social regeneration, which tourism can play a major role in fulfilling. Building on the investments and achievements of the past 20 years, the city has huge opportunities to further develop high yield tourism. It also has some major challenges. These opportunities and challenges are summarised below.

Strategic opportunities

- Fully exploit Turin's unique selling points which differentiate Turin from other cities in Italy and in Europe:
 - Its unique heritage and architecture, particularly the 'baroque city' and the Royal Residences;
 - Its museums that have outstanding appeal, notably the Egyptian Museum, the National Automobile Museum and the National Museum of Cinema;
 - Enogastronomy - unique food traditions and products with long standing tradition of excellence as well as the events organised by Slow Food;
 - Its industrial heritage, as manifested through the National Automobile Museum and the factories of 'Made in Torino' and 'Exclusive Brand Torino'
 - Its many hubs for innovation, research, technology and creativity, as an asset for development of the MICE markets.
- Further develop the MICE markets, as vital elements in the overall market mix for ensuring good, high yield business all-year-round;
- Develop and nurture new events that will further enhance the outstanding assets of the city and region and draw business during off-peak times;
- Develop cultural tourism, with a strong focus on creating, promoting and

selling cultural experiences;

- Develop rich visitor experiences relating to unique local resources, such as archaeology, enogastronomy, technology, industrial production; military tours (fortresses and battlefields), religious tours, Jewish heritage and performing arts – especially where there are effective, low-cost routes to niche markets;
- Expand the 'Made in Torino' programme and promote the factory tours to new markets, including business visitors, especially those coming for conferences and exhibitions;
- Further develop products that link the city with its region, for both group tour operators and individual travellers;
- Enhance and strengthen the Torino/Piedmont brand, learning from the initiative 'Exclusive Brand Torino';
- Foster travelling exhibitions from the city's museums and art galleries that will be presented and promoted to create positive international awareness of the city as a city of cultural heritage.

Strategic challenges

- Strategic action required to create faster, more direct road and rail links to French and Italian Riviera and to North West Europe; to enhance direct air services to Torino Airport; and to build a high speed link to Malpensa Airport
- Need to invest in education and training to enhance visitor welcome, improve standards of service and ensure that local communities benefit to the maximum from tourism.

Product case studies

The report on the overall case study of Turin includes four mini-case studies of specific initiatives that have made an important contribution to the overall transformation of the city and its region:

- Slow Food, which contributed to positioning Turin on the map of gastronomy centres, not only by choosing the city for the organisation of their major events, but especially by inspiring the city restaurateurs and food producers with its principles.
- Gelati Pepino, which has a long history and an historic cafe' in the city centre; Pepino is one of the founding members of Exclusive Brand Torino and has established itself as an international ambassador of excellent quality Italian ice cream made in Torino.
- Guido Gobino, a Master Chocolatier, rose to international fame during the Winter Olympics and has been awarded several international and national awards; Gobino's unique chocolates features at several national and international events. He is also one of the founders of Exclusive Brand Torino and participates in the TTP "Made in Torino" programme.
- Lavazza, which is an internationally renowned producer of blended coffee and coffee making equipment. Lavazza's new headquarters, which will include a museum, congress and exhibition facilities and a design school, have completely transformed a disused industrial site in an urban area to the north of the city centre and are already a landmark recognized internationally. Lavazza has also sponsored several cultural events in Turin.

1. Background information on Turin and its development over past 25 years

1.1 Location – advantages and disadvantages

The city of Turin is situated in the north west of Italy, close to the French border, in the region of Piedmont. It is surrounded by the Alps in the north and west, and hills in the south; it is crossed by the Po, the longest river in Italy. The natural scenery, as viewed from most places in Turin, is spectacular.

Figure 1.1 Map



Source: Google Maps (n.d.), *Location map of Turin* (online), available at: <https://maps.google.com/> (15-06-2016).

However, Turin's situation is one of its main challenges in attracting tourism. Land connections (road and rail) with other European countries and with the rest of Italy are still relatively poor. There are excellent motorways leading north to two of the longest tunnels in Europe (Mont Blanc and Frejus) and a high-speed train to Lyon; however, the High-Speed Railway line which

should have by now connected Turin with not only France, but also the rest of Europe, has been delayed for years by local protesters. The airport, although modernised for the Winter Olympics of 2006, is still only the thirteenth airport in Italy by number of passengers per annum¹ and its range of international markets served is limited. Fast train or road connections with the rest of Italy almost invariably pass through Milan, rather than Turin. Turin finds itself 'at the end of the line', with a competitive access disadvantage, compared with other tourist destinations in Italy, particularly Milan or Rome.

¹ ENAC (2016), *Dati di Traffico 2016*.

1.2 History

Turin was founded by the Romans more than 2000 years ago as an army camp. Roman walls and one of the main portals to the city are still standing. The distinctive grid map of Turin derives from the layout of that initial Roman settlement.

The city rose to fame from the 1500 when the Dukes of Savoy transferred their capital from Chambery to Turin. With the ascent of the Savoy's family power, Turin grew in importance and size, becoming the capital of the Kingdom of Piedmont and Sardinia and, in 1861, the first capital of Italy. Most of the city centre was developed under the Savoy family in the 17th and 18th centuries in the baroque style, which gives Turin an architectural appearance that is unique within Italy.

Figure 1.2 Turin's baroque style in San Carlo Square



Source: Anita Santorum (n.d.).

When in 1864 the Savoy King moved the capital of Italy to Florence briefly and then to Rome, Turin had to reinvent itself. Investment in infrastructure and education promoted the birth and rapid expansion of industries, ranging from food to textiles and manufacturing. The financial sector also grew: two of the major Italian banks originated in Turin. Eventually the car industry, led by FIAT, became the propeller of

the economy of the city and contributed to its expansion until the 1970s.

FIAT's success facilitated the growth of many enterprises along the supply chain (from design to components) and FIAT itself was diversified across several types of transport, including aeronautics and robotics. A variety of industries and service providers (e.g. telecommunication, office equipment) flourished primarily to supply FIAT, but also laid the foundations for expansion into other markets. Turin was also the city of RAI (Italian Radio and Television Company), as well as gas and electric companies.

The population of Turin reached a maximum of 1.2 million people in the early 1970s, with immigration from various parts of Italy, mainly from the South. When the oil crisis of the 1970s hit the car industry, FIAT responded with strategies which marked a downsizing of its production lines in Turin. The effect on employment and the economy of the city was dramatic. The decline continued progressively over a period of twenty years. Jobs were lost along the whole supply chain and factories closed. Urban areas built quickly in the 1950s and 1960s to host workers from other regions of Italy went rapidly into a state of dilapidation. Even the city centre was no longer the "Living Room" of Turin, as the locals used to call it: pollution had greyed all buildings and damaged landmarks, some historical shops, restaurants and venues closed and very few people would be found walking around late at night.

While other cities in Italy were attracting an increasing number of tourists from within Italy and overseas, Turin did not seek to position itself as a tourist destination, despite its history, heritage and natural endowment. The only initiatives to develop tourism were in the mountain resorts, which attracted skiers and hikers, mainly from the city of Turin itself, leading to the growth of second homes in those resorts. More than 80% of foreign visitors to the city were on business. The Egyptian Museum and the Automobile Museums were the primary tourist attractions and, although both had unique collections, their exhibit areas were constricted and their displays outdated. The Mole Antonelliana, an unfinished synagogue which, because of its distinctive architecture, became the symbol of Turin, remained empty and unused.

By 1991 the population of the city had fallen below one million and by 2001 it was just over 860,000 – almost a third of the population lost within 20 years. However, the size of the population of the larger area of the province of Turin, remained around 2.2 million. With some industries relocating outside of the city boundaries and more

occupational opportunities arising in small and medium enterprises outside Turin, people moved out in search both of jobs and higher quality living. The current population of Turin is 890,000.

1.3 Turin reinventing itself – the Phoenix rises

In 1991, an urban plan proposed the regeneration of a previously industrial area – the former FIAT factory of Lingotto, which was transformed into a multi-purpose centre including a shopping mall, conference and exhibition facilities, an auditorium

and an art gallery. This was an inspired concept and well executed - but, on its own, it was not enough to stop the city's decline.

The real turning point was the 1993 mayoral election. In the first direct election, the city elected Professor Valentino Castellani to be a politically independent mayor, who brought with him a formidable team. The Castellani administration

Figure 1.3 Former FIAT factory of Lingotto, now a multipurpose centre



Source: TTP (n.d.).

introduced a new vision for the city and an innovative approach to its realisation. The new approach was community centred, involved many stakeholders from the private and public sector, the University, the Polytechnic, as well as grass roots organizations. It also introduced thorough data collection, strategic planning and urban master plans and sought resources from the European Union, the central government, the private sector and foundations.

At the core of the vision and plans were culture, heritage conservation, research, innovation, diversification, community development, social inclusion, sustainability as well as building on traditional and existing resources². Turin did not reject its industrial (and car industry) tradition, rather sought to utilize disused factories transforming them into multi-purpose centres. One of the taglines promoting the

² This is documented in a study conducted by the London School of Economics (Anne Power et al., (2010) "Phoenix cities: the fall and rise of great industrial cities",), which looked at the key factors for the regeneration of crisis hit industrial cities across Europe.

transformation was 'la penetrazione della citta' dentro l'industria' – 'the city enters the factories'.

During his first term in office, Prof Castellani, via the implementation of the Urban Masterplan, proceeded with the regeneration and renovation of the city centre, particularly the main public spaces, and targeted rundown peripheral areas for regeneration also.

The initial successes led to Prof Castellani's re-election for a second term, during which the city introduced its First Strategic Plan and bid for the 2006 Winter Olympics. This process started a series of investment and actions which completely transformed Turin in preparation for the Olympic Games and continued well beyond 2006.

Key transformations included renovation of selected urban areas, reutilization of disused factory structures, restructuring of museums and landmarks, the creation of pedestrian areas in the city centre and the improvement of public transport, including the inauguration of Turin's metro line, the modernisation of the Caselle airport and improved links with city centre, investments in road and rail networks to link Turin with surrounding areas and other cities (primarily Milan and Lyon), and investment in education, research and innovation.

This transformation created the perfect climate for several additional initiatives from the private and non-profit sectors: for example, during those years the internationally renowned Slow Food movement (and its spin-off Eataly) started in Bra, a small town 50km from Turin at the doors of the wine and gastronomy region of Langhe-Monferrato and chose Turin for staging its international events (Terra Madre Salone del Gusto).

As a result, previously deteriorating urban areas now host hubs for research and innovation. A diversified industrial base is growing encompassing new sectors such as aerospace, telecommunication and sustainable energy, while traditional industries, such as industrial design and food (chocolate, ice cream, coffee and other traditional products) are innovating while retaining their strong traditions.

The focus on culture and heritage meant heavy investment in the renovation of historical landmarks (the Royal Residences) and museums. The Royal Residence of La Venaria Reale had been long abandoned and unused until the 1990s; now, it and the Egyptian Museum are Turin's top attractions in terms of number of visitors. Venaria and the other former residence of the Savoy have been recognized as UNESCO World Heritage Sites. Both the Egyptian Museum and the Automobile Museum have been dramatically improved – repurposed, redesigned, restructured, expanded and recognized as centres of culture and research, not just tourist attractions. The Mole Antonelliana has been renovated to host the Museum of Cinema, including a viewing tower in its spire.

Figure 1.4 The Royal Residence of Venaria



Source: Citta' di Torino, Bruna Biamino (n.d.).

Turin also hosts internationally renowned events and festivals, with themes ranging from food to art, books, movies, music and sport. Traditionally, Turin was host of an international motor show from 1900 to 2000; 15 years later, the show returned with a new outdoors formula which proved very successful. Since 1988, Turin has also been home to an international book fair (Salone Internazionale del Libro) which is the most important fair in Italy in the publishing sector. Other successful events, including the international fairs organized and promoted by Slow Food (Terra Madre Salone del Gusto) have been held in Turin since the 1990s and all have contributed significantly to promote the image of the city and attract visitors from other parts of Italy as well as other countries across Europe and the rest of the world. Turin is now not only a compelling tourist destination, but also a vibrant and liveable city.

2. Tourism in Turin

2.1 Primary tourism attractions of Turin – overview

2.1.1 Culture and Heritage

A primary focus of the transformation of Turin has been on culture and heritage. In previous centuries, whilst under the rule of the Savoy family, the city had already given high importance to art and culture. For example, the Egyptian Museum dates to 1824, when the King of Savoy bought the initial collection, investing three-quarters of the Kingdom's budget; Turin was also the first Italian city to have a collection of modern art as part of its Civic Museum, open in 1863.

Several museums and galleries have undergone recent renovation, expansion and changes in their display narrative and methodology.

Several of the museums and art galleries (such as, the Egyptian Museum, the Automobile Museum, the Cinema Museum, La Venaria Reale, GAM - the Gallery of Modern and Contemporary Art and the Museum of Oriental Art) have a research and conservation function, in addition to enjoyment and education for visitors.

The most relevant culture and heritage attractions of Turin are:

- The **Royal Residences**, more than 20 palaces and churches in and around Turin which belonged to the Savoy family; the most visited sites include La Venaria Reale, Palazzo Madama and the Royal Castle; the entire system of Royal Residences, called Royal Museums, is designated by UNESCO as a World Heritage Site;
- The **Egyptian Museum**, the second largest Egyptian collection in the world after the Museum in Cairo;
- The **National Cinema Museum**, a vast collection, interactive, experiential

Figure 2.1 The Egyptian Museum



Source: Citta' di Torino, Giovanni Fontana (n.d.).

and educational in its presentation, all inside the unique architecture of the Mole Antonelliana;

- The **National Automobile Museum**, a large collection presented within a historical, social, artistic and technical context, interactive and spectacular
- GAM - the **Gallery of Modern and Contemporary Art**, large collection and several temporary exhibitions, often run in conjunction with the Rivoli Castle, which also hosts a permanent modern art collection;
- **Sacra di San Michele**, symbol of Piedmont; the Sacra is an abbey dedicated to the Archangel Michael built in 987 on the top of a mountain dominating the Susa Valley, about 40 Km from Turin.

Figure 2.2 The National Automobile Museum (left) and Sacra di San Michele (right)



Source: Anita Santorum (n.d.).

Turin is also famous for the Holy Shroud, which is kept in the Cathedral of St John the Baptist; however, the Holy Shroud is displayed on only a few occasions, at the discretion of the Pope. The latest display took place from April to June 2015, for 67 days, and attracted over 2 million visitors. During the same period hotels in the city saw an 18% increase in occupancy rates over the same period of the previous year (reaching a record level of almost 80%) and a rise of 10.2% of the ADR (to more than €100) and of 30% of the RevPAR (to more than €80)³.

2.1.2 Sport

Turin's main sport is football. The city has two national league teams: Juventus and Torino. Juventus Football Club is well known internationally and has supporters

³ RES-STR Global (2016)

across the globe; both its new stadium and the Juventus Museum attract visitors from all over the world. Main matches draw many thousands of supporters into Turin.

2.1.3 Food

Turin has a long-standing tradition of quality and innovation in the production of food and drink. The first solid chocolate was produced in Turin in the early 1820s by Caffarel; the first chocolate covered ice cream on a stick was invented by Pepino in 1939; the confectionery factory that in 1857 produced the Kingdom Prime Minister's favourite candies – is celebrating its 160-year anniversary – still producing those same candies and more. Turin has created many unique products for consumption within Italy and abroad, including chocolates, pastries, ice cream, coffee, Vermouth.

2.1.4 Events

Turin hosts several international festivals and events ranging from culture, art, music, dance and film. The most important in terms of visitors and international participants are:

- Terra Madre Salone del Gusto, organized biannually by Slow Food, which has members in 180 countries – 1 million estimated visitors at the 2016 event;
- Salone dell'Auto (Automobile Show), held in the Park of Valentino, 700,000 estimated visitors in 2017;
- CioccolaTo – a celebration of Italian and international chocolate, with a focus on local producers, attracting 340,000 visitors in 2015;
- Salone Internazionale del Libro – a festival of literature, with publishers from various countries exhibiting, attracting more than 165,000 visitors in 2017;
- Artissima – contemporary art exhibition with hundreds of exhibitors, many international, attracting 50,000 visitors in 2016.

Figure 2.3 Salone dell'Auto (Automobile Show), in the Park of Valentino



Source: TTP (n.d.).

Other major cultural events held in Turin have included:

- Torino Jazz Festival, until 2016; in 2017, this event changed, was given a new name, “Narrazioni Jazz” and was held simultaneously with the Salone Internazionale del Libro;
- MITO Settembre Musica – classical music festival, in conjunction with Milan, offering concerts and opera at affordable prices;
- Torino Film Festival;
- Art and design exhibitions at GAM, La Venaria Reale, Palazzo Madama and other venues; these have also played an important part in making Turin a centre of culture and attracting tourists; the number of visitors can be significant, for example the GAM’s exhibition of Monet from October 2015 to February 2016 registered 300,000 visitors and was the most visited exhibition of 2016 in Italy.

2.1.5 Outdoor activities in the Province of Turin

A wide range of recreational activities is accessible from the city, including:

- Ski resorts, of which the most important are
- Bardonecchia Ski and ViaLattea (Sestriere, Sauze d’Oulx, Cesana Torinese, Claviere and Pragelato) in the Susa Valley;

- Biking and trekking itineraries, including ‘la via Francigena’, the ancient route which in medieval times connected Canterbury to Rome via France.

2.2. Performance Data

2.2.1 Volume of Tourism

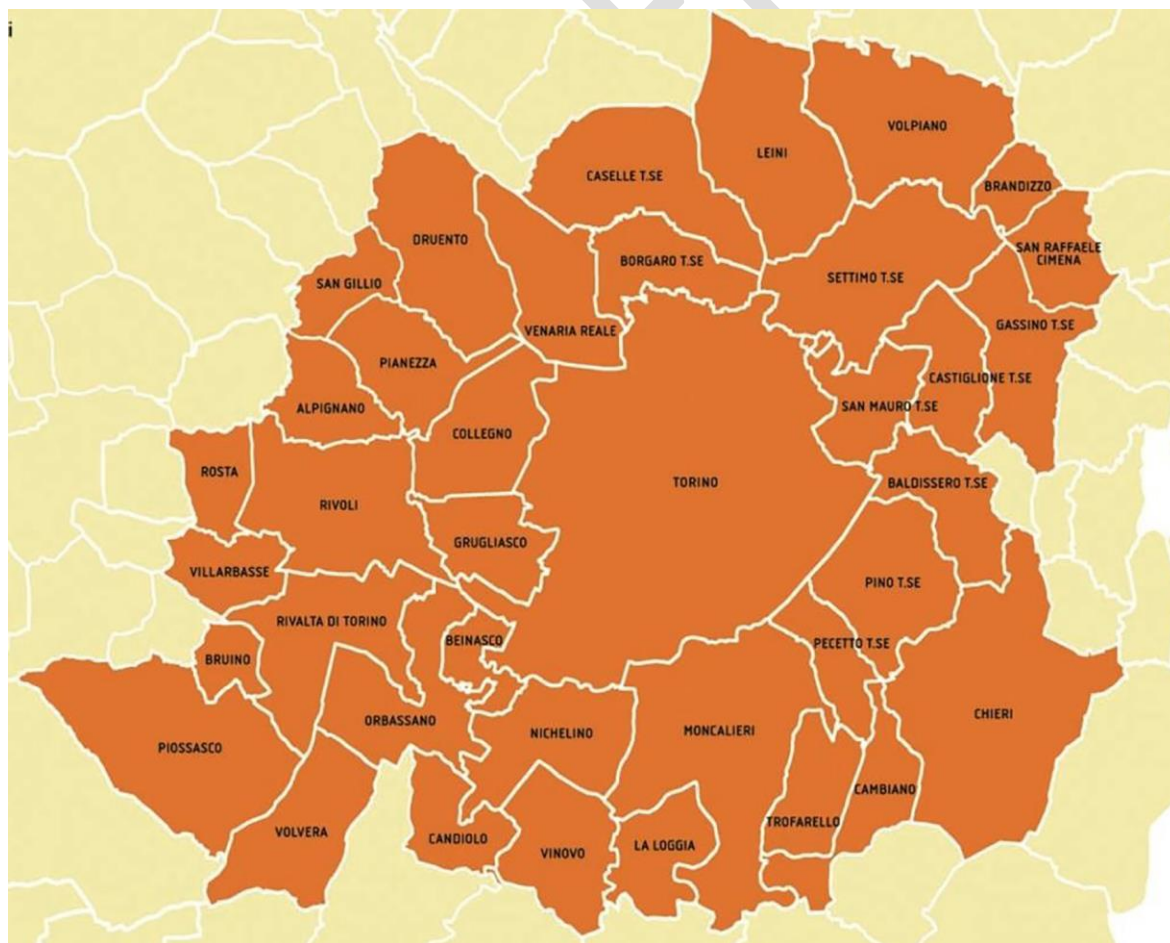
Table 2.1 Arrivals and Bednights in Turin Metropolitan Area*, 2000-2016

	2000	2005	2010	2015	2016
Arrivals					
Domestic	527,159	791,580	1,198,847	1,237,342	1,315,263
International	254,453	435,712	176,369	471,031	408,405
Total	781,612	1,227,292	1,375,216	1,708,373	1,723,668
Bednights					
Domestic	1,512,727	2,141,624	3,004,535	3,259,186	3,574,332
International	686,753	1,161,065	533,571	1,253,110	1,270,452
Total	2,199,480	3,302,689	3,538,106	4,512,296	4,844,784

* The city and its neighbouring municipalities, as shown in the map below

Source: Osservatorio Turistico Regionale (n.d.).

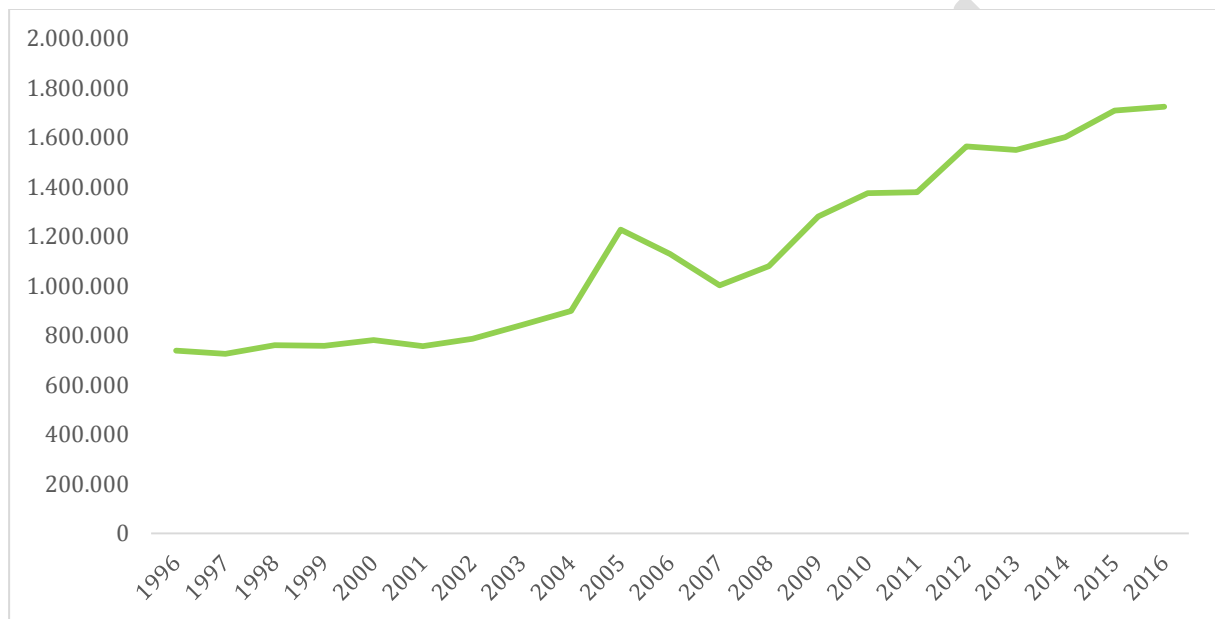
Figure 2.4 Turin Metropolitan Area



Source: Torino Strategica, Mappatura delle Trasformazioni Metropolitane (2013).

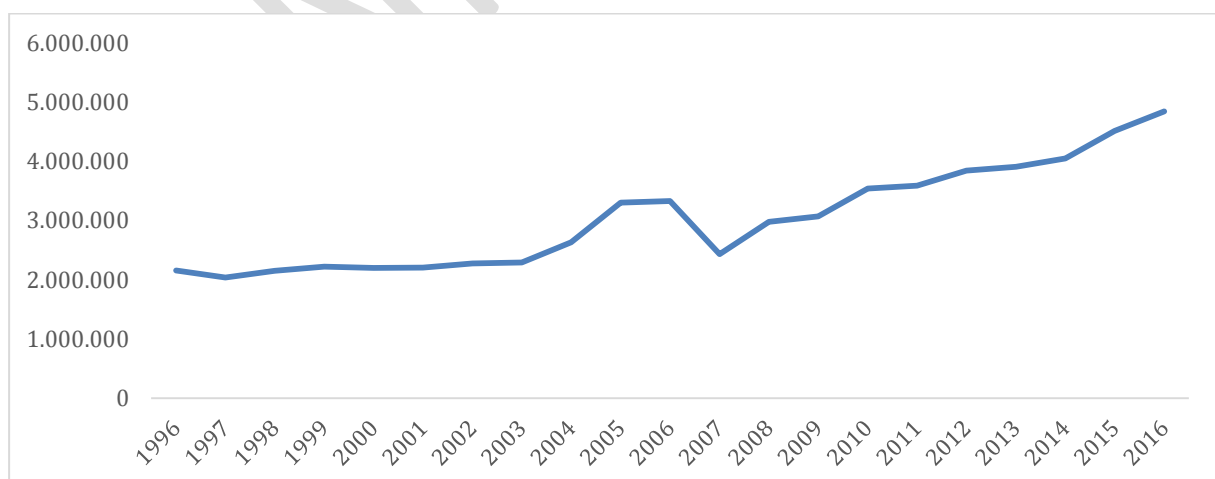
The two graphs below show that there was very modest growth in arrivals and nights between 1996 and 2004, but then there was an increase of about one third in 2005 and 2006, generated, if would seem, before, during and after the Winter Olympics. Tourism fell back the following year (2007), but thereafter showed a much higher rate of year-on-year growth than before the Olympics, continuing right through the recession to the present time.

Figure 2.5 Arrivals to Turin and Metropolitan Area, 1996 - 2016



Source: Osservatorio Turistico Regionale (n.d.).

Figure 2.6 Bednights in Turin and Metropolitan Area, 1996 - 2016



Source: Osservatorio Turistico Regionale (n.d.).

2.2.2 Visitor Profile and Satisfaction

A survey of predominantly leisure visitors in 2016 provided the key results shown in the table below.

Table 2.2 Visitor Profile and Satisfaction 2016

First visit to Turin	66%
Already visited Turin	34%
Intend to return	91%
Overall Satisfaction	
• Positive	93%
• Almost Positive	7%
Would recommend the city	99%
Satisfaction by elements (on scale of 1-5)	
• Museums	4.5
• Hospitality	4.3
• Accommodation	4.2
• Transport	4.2
• Restaurants	4.0
Main reason for visit	
• City attractions	73%
• Specific event	13%
Type of travel party	
• Couple	46%
• Families	34%
Arrivals by means of transport	
• Car	40%
• Train	36%
• Air	16%
How visitors learnt about the city	
• Internet	44%
• Family or friends	24%

Source: Osservatorio Turistico Turismo Torino e Provincia (2017a), *Profilo del Turista 2016, Turismo Torino e Provincia, Torino*. Data are based on a questionnaire survey of visitors who purchased the Torino Piemonte Card.

TTP has undertaken several visitor satisfaction surveys in recent years. Some of the most meaningful results for 2016 are noted in the table above. Key points are as follows:

- Levels of satisfaction are very high: 93% of visitors reported a positive experience in Turin, 91% would like to return and 99% would recommend it as a tourist destination;
- Evaluation of the city services was positive; based on visitor ratings of 1-5;

all services had an average score above 4, with an overall average of 4.2. Museums scored the highest (4.5) and restaurants the lowest (4);

- The perceived strengths were: personnel kindness, tourist attractions, service;
- Areas for improvement: feeling safe around the city; room furnishings and air conditioning in accommodation.
- Turin is perceived primarily as a cultural destination; 79% of survey respondents associated Turin with culture, Royal Residences, art and architecture, and 9% with enogastronomy.

2.2.3 Value of Tourism

Turin is the third Italian city destination in terms of its revenue from tourism, which totalled an estimated 1.68 billion euros in 2010⁴. This spending generated more than 50,000 jobs (9% of the total employed population in Turin)⁵. It is estimated that 61% of workers employed in the tourist industry are women and 34% are under 30 years of age⁶.

TTP has estimated the economic impact of Terra Madre Salone del Gusto, which is the event with the largest number of visitors (one million) held in Turin as generating an increase in the local GDP between seven and eleven million euros.⁷

The average daily expenditure was estimated at around 109 Euros per person in 2010-2011⁸. Levels of expenditure in each of five categories are shown in the table below.

⁴ This number is based on the most recent available estimates for tourist expenditures for the Region of Piedmont which totalled 3.5 billion euros in 2010. (Regione Piemonte, 2011 b). In the same year, arrivals and bednights in Turin Province were respectively 47% and 48% of total arrivals and bednights in Piedmont. (Regione Piemonte, 2011 a)

⁵ Ente Bilaterale Lavoro Turismo (2017), *L'Occupazione nell'Ambito Turistico nella Città Metropolitana di Torino*, Torino.

⁶ Ente Bilaterale Lavoro Turismo (2017), *L'Occupazione nell'Ambito Turistico nella Città Metropolitana di Torino*, Torino.

⁷ Osservatorio Turistico di Turismo Torino e Provincia (2017), *Report 2016. Analisi Mercati, Trend e Indagini Qualitative*, Turismo Torino e Provincia, Torino.

⁸ Piemonte Turismo e Ricadute Economiche, Regione Piemonte, 2013, using data provided by The Centre Omero of the University of Turin.

Table 2.3 Level of daily expenditure per person by category, 2016

Type of Expenditure	<10 Euros	11-50 Euros	51-150 Euros
Accommodation	6%	44%	41%
Restaurant/cafe'	3%	71%	21%
Attractions	10%	71%	17%
Entertainment	62%	32%	5%
Shopping	40%	42%	14%

Source: Turismo Torino e Provincia, Profilo del Turista (2016).

2.2.4 Key domestic and internationals markets

Turin's top domestic markets are Veneto, Emilia Romagna, Lombardia, Lazio and Toscana – i.e. the nearer regions from the North and Centre of Italy.

Top international markets are shown in Table 2.4. France is dominant, generating just over 150,000 nights in 2016, almost twice as many visitor nights as any other country. Spain, Germany, United States of America and China each generated 70-80,000 nights; and the United Kingdom, Romania, Switzerland/ Liechtenstein each between 50 and 60,000. All other markets were substantially smaller.

Table 2.4 Arrivals and bednights for key international markets, 2016

	Arrivals	Bednights
France	76,533	153,728
Spain	27,526	82,638
Germany	33,063	74,446
United States of America	23,607	71,141
China	8,615	68,208
United Kingdom	24,625	57,017
Romania	15,433	54,068
Switzerland and Liechtenstein	26,482	53,708
Russia	13,767	33,311
Belgium	11,777	27,840
Netherlands	11,191	26,633

Source: Osservatorio Turistico Regionale (n.d.).

In 2016, the average length of stay was 2.8 days (3.1 days for international visitors and 2.7 for domestic visitors). Of the key international markets, the Chinese had by far the longest stays, with an average between 7 and 8 nights. Visitors from Spain, United States of America and Romania had an average length of stay between 3 and 4 nights; from elsewhere between 2 and 3 nights.

2.2.5 Accommodation capacity growth and performance

Accommodation capacity (in terms of rooms and bed spaces) almost doubled between 2000 and 2016. Average annual bed occupancy also increased, indicating that bednights more than doubled

Table 2.5 Accommodation capacity and occupancy rates Turin Metropolitan Area*, 2000-2016

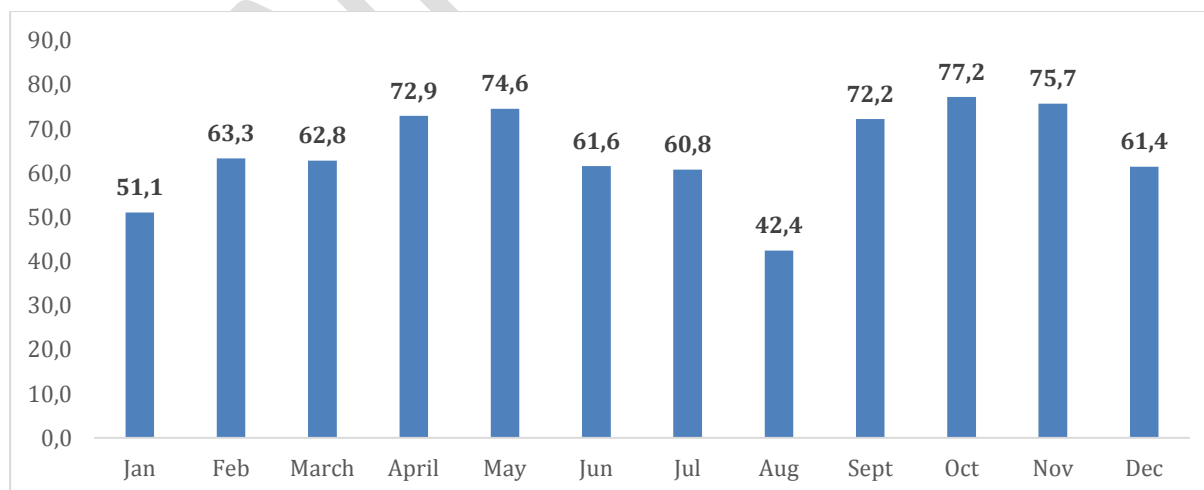
	2000	2005	2010	2015	2016
Accommodation units	368	520	693	903	920
Rooms	9,735	11,550	14,448	16,918	17,346
Beds	17,811	21,472	27,381	31,634	32,208
Bednights	2,199,480	3,302,689	3,538,106	4,512,296	4,844,784
Bed occupancy rate	34.3%	42.7%	35.9%	39.6%	41.8%

* The city and its neighbouring municipalities

Source: Osservatorio Turistico Regionale (n.d.).

Data from 2012 to 2016 for hotels⁹ show general increases in occupancy rates (from 58% to 65%), average daily room rates (from €83 to €86) and revenue per available room (from €48 to €56). As shown in the graph below, peak season is April-May and September-November; low season is August and January. Hotel occupancy reaches its weekly peak Tuesday to Thursday, and has the lowest occupancy on Sundays. During important football matches, occupancy rates are over 90%.

Figure 2.7 Hotel monthly occupancy rates, 2016



Source: RES-STR Global (2017), *Comparto Alberghiero: Trend evolutivi del Mercato*, Turismo Torino e Provincia

⁹ The data in this paragraph relate only to hotels and are from RES-STR Global (2017), *Comparto Alberghiero: Trend evolutivi del Mercato*, Camera di Commercio di Torino and Turismo Torino e Provincia.

These data on daily and monthly patterns of occupancy tend to indicate that, in the market mix, business tourism is still predominant, which is not surprising given the strength of manufacturing within the city region's economy. The strength of business tourism is a great asset to the city, generating high yield visits, autumn, winter and spring, at times when leisure visits are low. The MICE segment of business tourism may well have significant potential for further growth, given the scale and diversity of economic activity in the city region and the scale of the Universities in the city.

Broad estimates of meetings and conference activity in Turin in 2015 are that there were nearly 12,000 events (with about 15,000 conference days) in the Turin Metropolitan area, with nearly a million delegates participating and 1.3 million delegate days.

3. Strategic planning and development of Turin since 1990

3.1 City Development Plans and their key proposals for enhancing the city environment, economy, infrastructure and tourism

Turin's decline as industrial city started in the late 1970s. For several years, the city administrations thought the best solution was to try to recover the industrial model. However, a step in a new direction was taken with the restructuring of the car factory Lingotto: closed by FIAT in 1982, beautifully restructured by the architect Renzo Piano in a multi-purpose centre which includes a shopping mall, an art gallery, congress and exhibition facilities, two hotels and a tropical garden, while retaining the unique architecture of its outside walls. This Lingotto complex of leisure orientated facilities and services was opened in 1989.

By the early 1993, when Valentino Castellani was elected mayor, the city had lost 80,000 jobs over the previous 20 years. Castellani, "a professor from Turin's Politecnico, was free from traditional political allegiance, well connected with civil society, business and intellectuals, a leader with a non-partisan, progressive and participatory view of city change, determined to build alliances, look outwards towards Europe, innovate and develop a new citizen-based plan for the city"¹⁰.

3.1.1 Urban masterplan (1995)

Professor Castellani's first steps were to change the vision of all stakeholders, forging stronger links with the municipal authorities surrounding Turin (around 50 councils), the provincial and regional governments and the rival cities of Milano and Genova¹¹

His administration's first action was an Urban Master Plan that aimed at recovering the quality of the city structures and infrastructure. The first term of office focused on:

- Construction of the Railway By-pass along the Central Spine of Turin – burying of part of the railway lines passing through the central corridor of

¹⁰ Power, A. (2016), *Torino City Story*, CASE Report No. 106, London School of Economics, London.

¹¹ Power, A. (2016), *Torino City Story*, CASE Report No. 106, London School of Economics, London.

the city;

- Renovation of the historical areas, including major squares and the area of the Quadrilatero which were suffering from high degree of degradation;
- Renovation of degraded peripheral urban areas;
- Reutilization of disused industrial sites.

3.1.2 First Strategic Plan (2000-2006)

During Professor Castellani's second term as mayor, following the 1997 election, and following the successful bid for the Winter Olympics of 2006, the city administration prepared the First Strategic Plan (2000-2006). Inspired by the success of strategic planning for the city of Barcelona, Turin became one of the first Italian cities to adopt this practice. The preparation of the Plan took two years and involved all relevant stakeholders, including private sector, public institutions, private foundations, the university, the polytechnics and non-governmental grass-roots organizations. A new vision for the city emerged and, although subject to some objections, it was adopted.

The plan identified knowledge as the most valuable resource for the future and placed an important focus on research, communication, education and training. The strategy guidelines at the core for the plan included:

- Improved international and domestic air, road and rail connections;
- International cooperation;
- A governance system for the wider metropolitan area;
- Research and training;
- Development of new businesses and new jobs;
- Promotion of Turin as city of culture, tourism, trade and sport;
- Improvement in the quality of living in the city.

3.1.3 Second Strategic Plan (2006-2011)

The Second Strategic Plan maintained the direction of the first plan and sought to capitalise on the earlier achievements and on the investment in the Winter Olympics. By this time, Turin was perceived as a changed city, but the process of transformation seen to be far from complete. The focus remained on industrial recuperation, new enterprises and jobs, culture, research, education and training. The importance of innovation and technology were emphasised. The transformation of urban areas, especially the peripheries, remained a continuing priority. The challenges of immigration and social inclusion, together with health accessibility and research were given greater consideration. Tourism and promotion of the city became a primary focus.

During the course of the Second Strategic Plan, Turin was hit by the economic crisis of 2009. The crisis caused both loss of jobs and resources. “The vision lost momentum, because emergency became the focus” (Prof. Castellani). The two administrations after Castellani’s continued to pursue the direction of the Strategic Plan, but with reduced resources. Social problems in the peripheries have remained in part unresolved.

3.1.4 Third Strategic Plan (2015-2025)

The Third Strategic Plan was completed in 2015 after more than two years of work involving many stakeholders as well as authors of the previous plans. There were 230 consultee organisations or individuals, representing many different communities and interests. Tourism players were amongst them. TTP was involved from the beginning and was an active player in the plan discussion and design.

This plan identified the key policies for maintaining the ‘vision’ and outlined a specific agenda for economic development. The Plan’s vision for 2025 is of Turin as a “city of opportunities, vibrant, inclusive, promoting economic growth, international, open to initiatives and promoter of change and innovation for the city and for the whole country.”¹² The Plan outlines a systems approach which links various factors

¹² Torino Strategica (2015), *Torino Metropoli 2025, Terzo Piano Strategico della Citta' Metropolitana*, Torino Internazionale, Torino.

promoting development, including business and economic growth, public services efficiency, the value of culture (including food culture and tradition), creativity and tourism, quality of life and social inclusion, green infrastructure and sustainability. It identifies several specific projects and agencies for their implementation.

At present, Turin is awaiting clear directions regarding the status of the plan from the newly elected city council. The 2015-2025 Strategic Plan is under revision and there are no other general strategic plans from the regional council. Within this framework, the role of previous drivers of economic, social and cultural development as well as the key players in Turin's past and present development will probably determine the future strategies and plans

3.2 Strategic action for tourism

3.2.1 Summary of key strategic actions taken to develop tourism

Many major initiatives have been undertaken over the past twenty years that have had significant direct or indirect relevance to tourism. Here is a summary of the most significant actions undertaken, mostly within the framework of the Strategic Plans noted above and with guidance from the city council:

- Development and enhancement of the key museums, Royal Residences and other attractions;
 - Cleaning and renovation of historical areas;
 - Creation of pedestrian only areas in the city centre;
 - Renovation of peripheral areas of need, with investment from national and EU sources;
 - Creation of new university and polytechnic campuses with geographical connection to research and innovation centres;
 - Completion of the Central Spine project and railway by-pass;
 - Construction of the metro line;
 - Restructuring of industrial sites used as multi-purposed centres with focus on creating space for incubators, research and training centres, and exhibition and congress areas;
-

- Creation of extremely successful research centres and incubators for start-ups in the areas of ICT, renewable energy, health and design; these hubs for research and innovation are geographically connected along a corridor to the Polytechnic campus and the financial centre of the city;
- Smart City Master Plan, *SMILE – Smart Mobility, Inclusion, Life & Health, and Energy*, prepared by the city council in 2013¹³;
- Sustainable mobility through improved public transport as well as car and bike sharing initiatives;
- Improved connectivity throughout the city.

Two major site transformation and reutilization projects are due to be completed by 2017:

- Officine Grandi Riparazioni – OGR: one of the most important examples of 19th century industrial architecture in Turin, used until the early 1990s for the maintenance of railway vehicles, will become an innovation hub and a cultural and art centre, providing space for start-ups, events, exhibitions, performing arts and more (project financed by CRT foundation);
- Lavazza's new building 'La Nuvola' with museum and design centre; this project includes the construction of the new Lavazza's office building, the establishment of an international school of design, the creation of public parking and gardens, the restoration of an old church and the renovation of a 19th century power station, which will host an interactive museum, a restaurant as well as exhibition and substantial meetings/conference spaces.

¹³ "The City of Turin together with the Torino Smart City Foundation initiated, in 2013, a strategic smart city planning process: in a six months period, Turin's smart city roadmap was elaborated through a participatory planning process. Torino Wireless, the City's technical partner, coordinated and organised workgroups that involved 350 people (voluntarily and free of charge) from about 65 institutions (companies, universities, research centres, associations and public entities). The //workgroups addressed the city's five main areas of development: Mobility, Inclusion, Life & Health, Energy, and integration. The outcome was Turin's smart city Masterplan, called SMILE (the acronym for Smart Mobility, Inclusion, Life & Health, Energy): a document that presents the assets of the city, a national and international best-practices analysis and 45 project ideas on the vertical topics, including governance and smart city sustainability models.". Source: <https://eu-smartcities.eu/commitment/642> (15-06-2017). Unfortunately, recent developments after changes in the City administration have resulted in the cancellation of SMILE and the closure of Torino Smart City Foundation by the end of 2017.

3.2.2 Development of key attractions and venues

Figure 3.1 The Mole Antonelliana building, the icon of Turin (left) and the Cinema Museum, inside the Mole Antonelliana (right)



Source: Antita Santorum (left) and Roger Carter (right) (n.d.).

The development of key attractions has been undertaken with a focus on culture and a systemic approach. The Cinema Museum is probably the best example of this innovative approach. The vision has been to identify Turin as City of Cinema, building on its history and tradition (Turin was the cradle of cinema in Italy), creating the Museum of Cinema and at the same time establishing the Film Commission, investing in a Technology Media Park, organizing events such as the Turin Film Festival and the Lovers Film Festival.

The main museums are viewed not just as attractions celebrating the past, but also as centres for research, culture and education. Major changes have been made to optimise the utilization of space and modernised the display settings and methodology. The main museums are also active participants in international networks with exchanges and cooperation not only with other international museums but also with universities and research institutions, within Italy as well as overseas.

The Royal Residences, a network of over 20 residences and churches of the Savoy Kings, have been recognized as exceptional heritage to Turin and offer a unique experience to both visitors and local residents. The most prominent residences (such as La Venaria Reale and the Royal Museums) offer also a variety of events and exhibitions.

Table 3.1 lists the most important tourist and cultural attraction by number of visitors in with their completion date and the amount invested in the restructuring (when available).

Table 3.1 Development of key attractions and number of visitors, 2015

	Number of Visitors 2015	Completion date	Funds for Restructuring (Euros)
Egyptian Museum	773,101	2015	50M
Cinema Museum	632,103	2006	10M
La Venaria Reale	580,786	2007	300M
Gallery of Modern and Contemporary Arts (GAM)	372,469	2009	*
Palazzo Madama	198,884	2006	15M
Automobile Museum	165,199	2011	23M
Juventus Museum	162,783	2012	*
National Museum of the Italian Risorgimento	138,575	2011	15M
Sacra di San Michele	116,923		
Oriental Art Museum	106,497	2008	*

* information on funds invested not available.

Source: Osservatorio Culturale del Piemonte (n.d.).

Funds were provided by both public and private sources, including central government, the Region, the City Council, the European Union, the Compagnia of San Paolo Foundation (of the Bank Intesa San Paolo) and the CRT Foundation (of the bank Unicredit).

In addition to the leisure tourism attractions noted above, the city has also developed many venues for meetings, conferences and events/exhibitions. The main venue is at Lingotto, inside the former Fiat factory building, where there are two different entities: 'Centro Congressi Lingotto' and 'Lingotto Fiere'. Centro Congressi Lingotto was designed by the famous architect Renzo Piano. It blends history, art and culture, providing a superb combination of the past and modernity. Its capacity is as follows:

- Total Number of Rooms: 12;
- Maximum capacity of the largest room: 2,090;

- Exhibition area (sq.m.): 1,070.

Lingotto Fiere, owned by the French company, GL Events, is an exhibition centre, which has an average of 50 events per year, including trade fairs, consumer exhibitions, concerts, corporate and communication events, medical-scientific conferences/conventions. Its capacity is:

- Covered area, 58,000 sq. m;
- Outdoor area, more than 62,000 sq. m;
- 3 pavilions, from 7,600 to 18,000 sq. m;
- 4-17 congress rooms, up to 600 seats.

In addition, it includes Torino Oval (20,000 sq. m), a venue built for the occasion of the 20th Winter Olympic Games - Torino 2006, for speed skating events.

The city has many other smaller meetings facilities, such as Torino Incontra, Unione Industriale Conference Centre, the Polytechnic and the larger hotels, all very close to the major attractions (noted above) and various business and research centres.

An imminent addition to the city's meetings venues, is a major new space within Lavazza's new complex 'La Nuvola'. The development includes the renovation of a historic power plant building, which will become an event space, able to accommodate 1000 people and conference rooms, able to accommodate 240.

3.2.2 Key drivers for the development of the city and tourism

Over the last 20 years, key drivers for the development of Turin and its tourist sector have been:

- An ambitious and strong vision shared by all stakeholders;
- Wide stakeholder base participation;
- Sense of unity and pride, deriving particularly from the Winter Olympics;
- Popular support for initiatives to develop cultural activity in Turin;
- Public-private investment, not least by the major charitable foundations, founded by banks, with very large amounts of money at their disposal;
- Sustainable and innovative urban planning and strategic transportation developments;
- Systematic transformation of cultural and heritage landmarks and attractions and of disused industrial sites.

The city council policies on culture, education and training have created an ideal environment for business related to the tourist industry to open and grow and set the stage for a variety of cultural based events (such as Slow Food's Salone del Gusto and Terra Madre).

The city council focus on innovation and research, including the creation of seven innovation hubs with national and international exposure, has fostered cooperation between University, Polytechnic and the research centres, on the one hand, and the city council and the tourist industry on the other; this has contributed to enhancing the image of Turin as city of culture and innovation.

3.2.3 Key partners who are involved in strategic development and implementation

The key players over the past 20 years and for the future are:

- The city council;
- The regional council;
- Piemonte Marketing;
- Turismo e Provincia;
- All major museums and art galleries;
- The Chamber of Commerce;
- Polytechnic and University;
- Private companies and non-governmental organisations, in particular:
 - Compagnia di San Paolo Foundation and CRT Foundation;
 - La Consulta for the preservation and development of artistic and cultural heritage of Turin¹⁴
 - Lavazza;
 - Exclusive Brand Torino and its members¹⁵;
 - Slow Food.

¹⁴ La Consulta is a group of 32 private companies and organizations, which includes large companies such as Intesa Bank, Reale Mutua, FCA, Ferrero and Lavazza, as well as the Industrial Union of Turin. Established in 1987, La Consulta has completed over 70 restoration and preservation projects for a total investment of 30 million euros. Source: www.consultaditorino.it/ (15-06-2017).

¹⁵ There is a consortium of 17 private companies characterized by the excellence of their products, which came together in 2012 to form 'Exclusive Brand Torino', with the main aim of fostering exports and is the first transversal network in Italy. Source: www.exclusivebrandtorino.it/ (15-06-2017).

All key players recognize the essential role of tourism for the economic growth of Turin.

3.2.4 The role of tourism in Turin's wider economic development

Tourism has an increasing role in the economic development of Turin as well as of the whole region. In 2014, the tourist sector contributed 7% of Piedmont's GDP and it is still growing at an estimated rate of 1-2% per annum, performing better than other sectors. The economic impact on the city of just single events, such as Terra Madre Salone del Gusto or the Salone dell'Auto, which brings hundreds of thousands of visitors, have a significant multiplier effect on the economy.

3.2.5 The role of culture in economic development and tourism

As outlined in earlier sections, culture has played a key role in the social and economic development of the city and is a driver for further enhancing the image of the city. Culture is viewed as a system which includes preservation, conservation and celebration of the city's heritage, and is a stimulus for education, research and innovation. The city has invested in events with high cultural contents, which provide a meeting place for the local and international communities.

Museums, royal residences and art galleries are not only attractions for visitors but also, in many cases, centres of culture, education, research, training, places for sharing of knowledge and ideas with other cities, particularly in the context of major events and exhibitions. Thus Turin, through its research centres, universities and other cultural organizations has become engaged in evolving and expanding international communities and will have the opportunity for further engagement in the future – thus growing a small but valuable form of niche tourism which has wide-ranging benefit to the city.

For these reasons, in the Strategic Plan 2015-2025, culture, creativity and tourism were viewed as linked to each other and their development as a key driver for further enhancing the city.

3.2.6 The role of digital technologies in economic development and tourism

The development of innovation and technological hubs has a double effect by bringing into Turin new companies as well as visitors linked to business and research, and develops many technologies (ICT) which can be used in the tourist sector. New start-ups are expected to emerge and provide services and products to the tourist industry.

The Region of Piedmont has plans to invest¹⁶ into:

- Open data and Big Data for touristic sector, seeking opportunities for greater monitoring, measuring and forecasting capabilities.
- Digitalisation for businesses and organization operating in the tourist sector (public and private), including digitalisation of existing resources and development of new contents and formats.
- Investment in services for digital innovation, including portals and smart phone apps to access services in mobility (booking, ticketing, online payment, information and cultural contents).

3.2.7 The sharing economy in Turin

Several start-ups in the sharing economy sector are choosing to establish themselves in Turin, because of the opportunities offered by the technology and innovation hubs. In fact, Turin has the potential to become the Italian capital of the sharing economy. Turin's sharing economy offers already include:

- Car sharing (three companies plus Blablacar);
- Bike sharing;
- Apartment sharing (in 2016, 17% of tourists used Airbnb and HomeAway¹⁷);
- Office sharing and co-working (Toolbox).

¹⁶ Regione Piemonte – Agenda digitale Piemonte (2015), *Il Digitale per il Turismo e La Cultura*.

¹⁷ Osservatorio Turistico Turismo Torino e Provincia (2017),

As new start-ups enter the market, more products will be available to both visitors and residents, facilitating mobility, finding information, sharing office and accommodation spaces and reducing costs. The sharing economy will also help with developing sustainable tourism. Smart mobility has been rather successful with regards to local residents use; however, more should be done to make services more accessible to tourists. At the moment, tourist can purchase four hour and eight hour bike sharing passes at the information offices of TTP.

Regulations affecting the sharing economy are designed and issued by Regione Piemonte. The Regional Council is currently working on regulations for shared accommodation, partly in answer to growing concerns voiced by the more traditional accommodation industry.

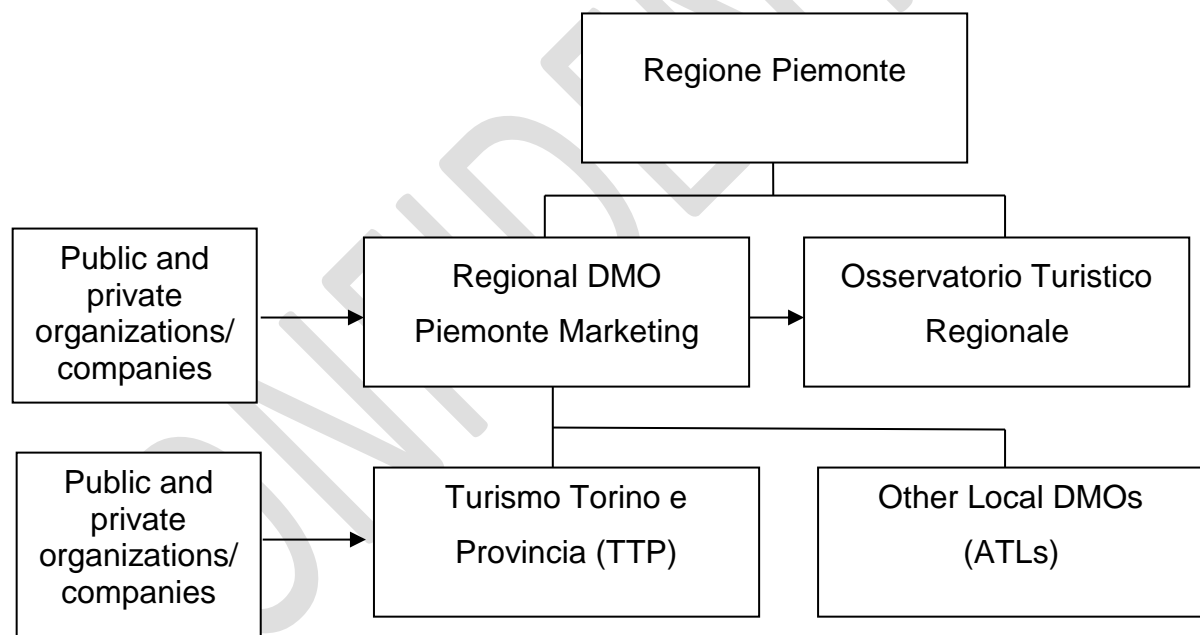
4. Tourism structures and policies

4.1 Regional tourism structure and policies

In 1996 a regional law established a regional agency for the development of tourism, Sviluppo Piemonte Turismo - SPT, and 12 local agencies (Agenzie di Accoglienza e Promozione Turistica Locale – ATL). In 2016, a new law merged SPT with IMA, the Institute for Marketing of Agriculture and Food Products of Piedmont.

The current DMO structure includes Piemonte Marketing, the regional DMO, and 9 local DMOs. The figure below shows what the structure of the DMO network looks like.

Figure 4.1 Structure of the DMO in Piemonte



Source: Team Tourism Consulting (2017).

Piemonte Marketing makes plans at regional level and has functions to promote tourism in Piedmont, promote 'made in Piedmont' products, act in the interest of its and coordinate the work of the local DMOs. It can give guidelines to the ATLs but it does not have any direct control over them.

In 2009, The Region of Piedmont adopted a Regional Strategy for the Promotion of

Tourism¹⁸, establishing some general guidelines for the DMOs. One of the main objectives was to market specific local products under the overall Brand Piedmont. Actions outlined in the plan include:

- Establishment of PR networks in international and domestic target markets;
- Direct marketing at sector fairs and workshops;
- Joint marketing and sales with travel and transport companies;
- Utilization of web and social networks;
- Follow up actions including monitoring and customer satisfaction surveys.

Data collection and monitoring of tourism in Piedmont is undertaken at both local and regional level and is ultimately under the responsibility of the Osservatorio Regionale, which is an office of the Regional council.

Figure 4.2 Map of Piedmont/Piemonte



Source: Wandering Italy (n.d.), *Piemonte Travel Guide* (online), available at: www.wanderingitaly.com/maps/piemonte.html (15-06-2017).

¹⁸ Regione Piemonte (2009) *Strategie Regionali della Promozione Turistica*, Torino.

4.2 Turismo Torino e Provincia (TTP)

TTP has been operating since 1997 and is the ATL for Turin metropolitan area. It is a non-profit public-private consortium, with a majority public shareholding. Its main partners are: the City of Turin, the Region of Piedmont, the Citta' Metropolitana (composed of the city councils of the greater urban area) and the Chamber of Commerce. The Region and the local municipalities together own 96% of the shares. The other 4% is owned by the Chamber of Commerce and individual tourism companies, including GTT (transport), Sadem (buses), Sitaf (motorway) and Sagat (airport). TTP is considered the tourism operating arm of those partners and its activities focus on marketing and communications for the Turin Metropolitan area. In 2010, TTP incorporated the Turin Convention Bureau and its functions, to facilitate coordination, enable synergies and achieve economies of scale.

TTP's goal is to organise "all the actions for promoting Turin and its province, welcoming and providing information to tourists coming for leisure purposes or relating to the MICE". "TTP creates tourism products and services that meet the needs of tourists, conference participants and organisers of events, facilitating and extending people's stay in the territory and increasing the tourist flows and the number of events".¹⁹

TTP's main responsibilities are to:

- Engage with the city council and with tourist and cultural attractions, private businesses and public organizations;
- Develop and produce information for marketing and for visitors;
- Promote Turin to the domestic and international press, to intermediaries in the leisure tourism and MICE sectors, and to end-users;
- Welcome tourists at the tourist bureau and through information points;
- Prepare and present bids for the city to host major conferences;
- Undertake performance measurement, monitoring and tourist profiling.

TTP has 80 employees at its headquarters and the information points. Its website is intended as the primary source of information on Turin metropolitan area and

¹⁹ TTP (n.d.), *About Us* (online), available at: www.turismotorino.org/docs_big/EN/A472/about_us (15-06-2017).

presents TTP's developed products, tourist attractions and events in Turin.

Products developed by TTP include:

- Three pass-cards which give access to most attractions: Torino Piemonte Card, which gives free admission to the most important museums and exhibitions and discounts to other cultural sites tourist services, cultural events, outdoors activities and guided tours; the Royal Card which is more focused on the Royal Museums products; and the Torino+Piemonte Contemporary card that gives free admission on contemporary art museums and exhibition;
- Specific itineraries and products targeting the Royal Residences experience (the itinerary Reali Sensi, Crown of Delights and the Royal e-bike tour, as well as the food experience Merende Reali);
- Outdoors itineraries;
- Enogastronomic²⁰ itineraries;
- “Made in Torino”, a programme offering guided tours of factories which are landmarks of industrial success and excellence for Turin; sectors represented range from confectionery to chocolate, beverages, ceramics, cars and design. Some of the businesses have been operating for more than 150 years;
- City Sightseeing Torino with three different routes (city centre, unexpected Torino and Royal Residences line).

To stimulate the development of new tourism products, TTP invites private operators and public institutions to submit ideas for brainstorming, following TTP provides feedback; when the products are available, TTP assists in advertising and promotion.

TTP has developed partnerships with airlines and rail operators, tour operators and tourism associations. It also works with other local DMOs and has recently established cooperation with the DMO of the neighbouring area of Langhe and Roero.

Various apps for smartphones, developed by private and public organizations for

²⁰ For a discussion about the meaning of enogastronomy, see Viganò, G. (n.d.), 'Enogastronomy: a path towards the discovery of the local culture' (online), available at: www.esade.edu/cedit2003/pdfs/viganogiovanni.pdf (15-06-2017).

informing, guiding and facilitate the visit to Turin, are listed on and downloadable from the TTP website.

A large part of TTP's work is devoted to promoting the city for meetings, incentive tours, conventions and exhibition, using the venues mentioned in Section 3.2.2. TTP assists with the bidding, organization, advertising, coordination and welcoming of participants. In 2016, TTP Convention Bureau organized 14 events, won in national and/or international bidding, with a total of 30,820 participants and 93,000 attendance; TTP estimates the economic impact of its 2016 congress activity between 23.25 and 32.55 million euros²¹.

²¹ Turismo Torino e Provincia (2017)

5. Project case studies – private sector's contribution to the development of tourism in Turin

The city council driven transformation of Turin since the late 1990s has created the conditions for new businesses and organizations to grow and for existing enterprises to overcome the economic crises and expand. In their turns, private businesses and organizations have given back to the city, becoming true ambassadors for Turin through their success, international exposure and, especially, their unwavering commitment to tradition, quality and sustainability.

This section presents four case studies. The first one is about the Slow Food movement and their contribution to positioning Turin on the map of gastronomy centres, not only by choosing the city for the organisation of their major events, but especially by inspiring the city restaurateurs and food producers with its principles.

The other three case studies are about private, family businesses, which so often are the backbone of the economy of Italian cities. Gelati Pepino has a long history and an historical cafe' in the city centre; Guido Gobino is a Master Chocolatier, who has conquered many of the finest palates in Europe, Asia and America; Lavazza is an internationally renowned coffee blends and equipment producer.

Pepino and Gobino are among the founding members of Exclusive Brands Torino, a business network "for the development and promotion of a selection of local high-quality brands and products on international markets". Exclusive Brands Torino comprises 17 firms across various sectors, including food, design, fashion, jewellery, publishing, wine and liqueurs, "all sharing a selected clientele and strong international tendencies, distinguished for the quality of their products and services, all of which fall into the luxury range, and are particularly outstanding for their creativity, innovation, and research".²² This is a superb example of a group of entrepreneurs coming together to undertake a joint branding campaign which will not only benefit their business, but also increase the awareness and enhance the image of the City of Turin as a city of excellence and quality goods and services.

Gobino and Lavazza also participate in the Made in Torino– Tour the Excellent programme organized by Turismo Torino e Provincia. This is an innovative

²² www.exclusivebrandstorino.it/ (15-06-2017).

experiential product designed and promoted by TTP, in cooperation with the Chamber of Commerce. Launched in 2005, this programme is the first industrial tourism initiative in Italy. For a few months each year, a selected group of artisan laboratories and historical factories of Turin open their doors to guided tour groups and visitors have the opportunity to learn about the history of the business, observe the 'making' of the product and, for food, taste a small sample straight out of the processing line.

The latest edition had 39 participating businesses from a wide spectrum of sectors, including food (chocolate, confectionery, bread, pasta, pastries, cold meats and dairy products), beverages (coffee, wine and liqueurs), publishing, jewellery, ceramics, textiles, musical instruments, a puppet maker, cars and even aerospace.

The programme has been a success with all tours sold out within days from appearing on the TTP website.

5.1 Slow food

Slow Food is a non-governmental organization and international movement, focusing on quality, fairness and sustainability of food production, processing and consumption. Slow Food 's mission is to create "a world in which all people can access and enjoy food that is good for them, good for those who grow it and good for the planet".²³

Slow Food's "approach is based on a concept of food that is defined by three interconnected principles: good, clean and fair.

- Good: quality, flavorsome and healthy food;
- Clean: production that does not harm the environment;
- Fair: accessible prices for consumers and fair conditions and pay for producers".

Slow Food has a large on-line community of 1 million people, 100,000 subscribing members, and 1,500 chapters (called "convivia") in 160 countries around the world.

Projects have been undertaken by Slow Food members and volunteers across the

²³ www.slowfood.com/about-us/our-philosophy/ (15-06-2017).

globe, reaching local communities even in war zones such as Syria, Afghanistan and Libya and giving voice to indigenous communities of Africa, America and Asia. Slow Food projects have wide media and press coverage and exposure.

5.1.1 History

Slow Food was founded by a group of friends in 1986 in Bra, a small town in the province of Cuneo, Piedmont, 50km from Turin, located at the doors of the Langhe-Monferrato area, one of the most important regions of gastronomy in the world.

Slow Food's first major event was the 1996 Salone del Gusto (Taste Fair). In 1996, Turin was neither the food nor the wine capital of Piedmont. Turin was selected by the organizers primarily because of the positive effects of the culture focused policies of the city council. From that event onwards, Slow Food formed a strong partnership with the city council, TTP, the Region of Piedmont, the Chamber of Commerce and other major stakeholders.

In 2004, the spin-off organization Terra Madre was established. While the Salone del Gusto has a more commercial purpose, although still with a strong focus on education, Terra Madre is more political, focusing on small communities.

5.1.2 Most significant contribution to culture and tourism

Terra Madre and Salone del Gusto events

The first Salone del Gusto was held in 1996, indoors in Lingotto. It was on a relatively small scale, but very successful. Inspired by the event and the philosophy of the Slow Food movement, new restaurants were opened and some business moved into Turin. At the end of 2014, it was decided to move the Salone del Gusto into the city centre, outdoors, giving more exposure to the event and the opportunity to attendees to visit the city. In 2016, Salone del Gusto and Terra Madre became one joint event, which, over five days, attracted around one million visitors, more than half of whom were international visitors.

Slow Food, through its events has been helping to promote Turin to a global

Figure 5.1 Eataly shop and restaurant (combined) at Lingotto



Source: Citta di Torino (n.d.).

audience, as a food capital, a distinctive centre for gastronomy and a city of culture, through the Salone del Gusto and a range of fringe events, such as special visits to the Egyptian museum to learn about food in ancient Egypt, and at the Museum of Oriental Arts, to participate in a tea ceremony.

The next edition in 2018 will expand the educational format with guided tours of the fair and personal shoppers – students from gastronomy schools, as well as guided tasting tours of selected producers in the mountain and hill areas surrounding Turin.

Slow Food has inspired a large number of entrepreneurs in the

food sector:

Eataly, a private company is a spin-off of Slow Food and Salone del Gusto., After visiting the Salone, Oscar Farinetti, Eataly's founder, thought of creating a space where people could have the same experience every day and, on the advice of Slow Food, chose to start his venture in Turin. Eataly is now an international company with food malls and shops in major cities around the world, promoting Slow Food philosophy as well as the city of Turin and the products of Piedmont.

Another project fostered by Slow Food is **Maestri del Gusto ('Masters of Taste' of Turin and its province)**. Launched in 2002 by the **Torino Chamber of Commerce** and **Slow Food**, the project addresses **medium-small and small food businesses** of the Turin province, including farms, artisan laboratories and shops and **establishes strict assessment standards** for goodness, cleanness and fairness.

Figure 5.2 Gelateria Pepino



Source: Anita Santorum (n.d.).

Food businesses which aspire to be recognized as Masters of Taste, have to pass a scrupulous selection process. Certified Masters of Taste are listed in a book, which is soon available in digital form for electronic distribution; selected businesses are also engaged in a programme of promotional events, including tasting itineraries, fairs and exhibitions. The Masters' number has increased from the initial 50 to the current 182 representing 26

categories.

The success of the Slow Food movement and its events has created the perfect environment for food producers and businesses to grow and invest in high level quality produce and services. Slow Food has inspired local producers and manufacturers as well as restaurateurs to value traditions, select quality primary products and processing, educate consumers and promote enogastronomic itineraries for food and wine lovers from Italy and the rest of the world. Slow Food inspired tourist itineraries are more than just a list of recommended businesses; they are cultural experiences of appreciation of history, land, producers, ingredients and process

Gelati Pepino

Gelati Pepino is a company which has been producing high quality ice cream in Turin since 1884, when Domenico Pepino, an artisan ice cream maker from Naples, decided to move to Turin. Within a few years, he opened an ice cream parlour, "Vera Gelateria Artigiana" - True Artisan Ice Cream, which quickly became known as a delicacy favoured by the royal family and upper class.

In 1916, Domenico Pepino sold the brand and manufacturing secrets to Giuseppe Feletti, a well-known chocolate manufacturer, and his son in law Giuseppe Cavagnino who expanded the production, while retaining the original recipe and the quality of ingredients. In 1939, they created and patented the "Pinguino", the first

chocolate covered ice cream on a stick made in Europe. They also sought ways to ship their products, before freezer trucks were invented, by using dry ice; the advertising tagline of the time was "Gelato Pepino goes everywhere".

The Pinguino is still produced with the same passion, traditional recipe and selection of quality ingredients, in 6 different flavours;" the original recipe stands the test of time and the care put into producing the Pinguino® make it a gelato imitated all around the world".²⁴

Gelati Pepino has been in the Cavagnino family for 5 generations, and is led today by Edoardo Cavagnino, great-grandson of Giuseppe Cavagnino. When in 2007, Edoardo Cavagnino took the lead of the company, at just 24 years of age, Gelati Pepino was suffering from the effect of the economic crisis; however, he managed not only to salvage the company, but also to expand it. In 2011, Gelati Pepino was among the 14 founding companies of Exclusive Brand Torino. In 2013, Pepino ice cream appeared in London and in 2015 at the International Motor Show in Geneva with a special edition packaging designed by Giugiaro, the world known designer. Producing special editions for special events is a marketing strategy which continues to be pursued. Gelati Pepino has also an especially dedicated corner in the Eataly stores in Italy and overseas.

The flagship location for Gelati Pepino is the historic "**Gelateria Pepino**" in Piazza Carignano, just one street across from the Egyptian Museum, in the baroque centre of Turin. The restaurant has established itself not only for the sale of artisan ice cream, but also for dining, cocktails, breakfast and catering.

During more than a century of operation, the company has established itself as an international ambassador not just of excellent quality Italian ice cream, but also of the city of Turin. A stop at Gelateria Pepino for savouring a "Pinguino" is on the to-do-list of most tourist guides of Turin.

Guido Gobino

Turin has long history in chocolate production. In fact, the first solid chocolate was invented in Turin in the early 1820s by Pierre Caffarel. In the 1940s there were more than 100 chocolate producers in the city. During the 1970s economic crisis, large producers (such as Talmone and Venchi) either closed or moved out of the city. At

²⁴ www.gelatipepino.it/ (15-06-2017).

present, there are only 5-6 larger local producers, yet over 100 small processing laboratories.

Guido Gobino is a relatively recent entry in the artisan chocolate world of Turin and is an extraordinary example of excellence and achievements.

In the 1960s, Giuseppe Gobino, Guido's father, was working for a small chocolate and confectionery producer and acquired such skills and knowledge that first was placed in charge of production and later, in 1980, purchased and took over the business. Guido Gobino continued along the lines of quality and traditional recipes

Figure 5.3 Guido Gobino chocolate factory



Source: Anita Santorum (n.d.).

and processing established by his father, and went even further. His company is small (just over 40 employees), however all aspects of production and distribution are refined to the very small details. Guido Gobino has invested in the careful selection of quality ingredients, research, innovation, design and even a training programme for consumers and sector operators who want to learn how to fully appreciate chocolate tasting.

Gobino has participated in several national and international competition and has been awarded prestigious awards, including, in 2008, the recognition by the Academy of Chocolate of London for the world's best praline for its sea-salt cremino' with extra virgin olive oil. Already in 2006, the New York Times defined Guido Gobino as Turin's "chocolate king" ("In Turin Chocolate is the Champion", the New York Times, 16 February 2006).

Guido Gobino international exposure started with the Olympic Winter games, when he was appointed "Ambassador of Turin", along with other 80 representatives of Piedmont's culture and business, and continued joining forces with the Slow Food movement, of which they share the principles and their commitment to sustainability, and Exclusive Brand Torino (they are one of the founding members), participating at

various events in Turin (the Book Fair, the Film Festival, Artissima) with special chocolate editions. In 2015, Gobino even produced special chocolate and packaging for the Space Station, in a project by Argotec, a Turin based aerospace engineering company, and ASI, the Italian Space Agency.²⁵

Other promotional initiatives include:

- Factory tours, which started with the Olympic Games, continued in conjunction with major festivals, and are now offered on a booking basis (70 organized tours took place in 2016);
- Participation in the TTP's "Made in Torino" programme;
- MICE events, such as a recent team building workshop for Ford.

Gobino's exports amount to 10% of its total production, with markets in UK, Saudi Arabia and UAE, USA and Japan. Gobino is now looking at entering other markets in Europe and in October 2017 will participate in the Salon du Chocolat in Paris ("Guido Gobino vuol prendere per la gola inglesi e francesi", Adriano Moraglio, Sole 24 Ore, 6 April 2017).

Lavazza

Lavazza is a firm which has been producing coffee blends for over 130 years. The first shop was opened in Turin by Luigi Lavazza in 1885. The first laboratory was established in 1927. Lavazza's business survived during the WWII coffee import block and rapidly expanded after the war. The 1970s economic crisis was successfully overcome through investment in study, research and innovation. In the 1980s expanded internationally, first in France, then in other European countries and overseas, making not just coffee but also coffee makers for offices and homes. In 2015, they even produced the first ever coffee maker for the Space Station, for a project with the aerospace engineering company Argotec and the Italian Space Agency.

Lavazza is a company that believes in tradition

Figure 5.4 Lavazza 'La Nuvola' building



Source: Anita Santorum (n.d.)

²⁵ <http://guidogobino.it/cioccolatino-nello-spazio> (15-06-2017).

and sustainability, with a passion for culture, art, photography and design. The Foundation Giuseppe Lavazza sponsors projects for improving the living conditions of people in coffee producing countries and is sponsor and partner major events (main sponsor of Salone del Gusto), sport as well as art and photography exhibitions in Turin and other cities.

In the early 2000s, when Lavazza's headquarters needed new premises they decided to stay in Turin. Their new site was chosen in consultation with the city council on the basis of the following criteria²⁶:

- Sustainability – reutilization of disused industrial area;
- Closeness to the city centre and the previous premises;
- The opportunity to upgrade the whole urban area.

Figure 5.5 Lavazza 'La Nuvola' building



Source: Anita Santorum (n.d.).

The project "La Nuvola" (The Cloud) includes office buildings, public parking, gardens, a new street (with trees and free WiFi connection) and the restructuring of a complex of buildings pertaining to a disused power station, built originally in 1897, which will host a museum, a Slow Food restaurant, a conference

venue and exhibition space. The project also includes a design school for 500 students, 30% of which are expected to be international students. The Museum will include a replica of the first Lavazza shop, history of the family and coffee processing and will be interactive. The museum is expected to attract 45-70000 visitors per year.

"La Nuvola" project will be completed by the end of 2017; however, it is already a city landmark. The New York Times, including Turin among their selection of destinations for the forthcoming year, emphasises the entire transformation of Turin northern periphery, from disused industrial sites and cramped apartment blocks to a beehive of innovation, culture, music and art centres and activities, and specifically

²⁶ Lavazza (n.d.), 'La Nuvola' project (online): available at: <http://nuvola.lavazza.it/> (15-06-2017).

mention Lavazza's new headquarters. ("On the Road, Off the Path", International New York Times, 9 January 2016).

Lavazza's "La Nuvola" project is a bright example of private-public sector cooperation, not limited to private funding of public initiatives, but encompassing shared intents and a deep commitment to the community and the environment.

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6. Tourism opportunities and challenges – a continuing journey

6.1 Overview

Turin has gone through a dramatic transformation over the past 20 years, making the city a much more attractive place to live and work; creating a more diverse, healthier economy; and affirming itself, internally and externally, as a city of culture and a highly attractive and interesting tourist destination. But the task is not complete; the journey must continue. The city has continuing needs for economic and social regeneration, which tourism can play a major role in fulfilling. Building on the investments and achievements of the past 20 years, the city has huge opportunities to further develop high yield tourism. It also has some major challenges. These opportunities and challenges are summarised below.

6.2 Strategic opportunities

- Fully exploit Turin's unique selling points which differentiate Turin from other cities in Italy and in Europe:
 - Its unique heritage and architecture, particularly the 'baroque city' and the Royal Residences;
 - Its museums that have outstanding appeal, notably the Egyptian Museum, the National Automobile Museum and the National Museum of Cinema;
 - Enogastronomy - unique food traditions and products with long standing tradition of excellence as well as the events organised by Slow Food;
 - Its industrial heritage, as manifested through the National Automobile Museum and the factories of 'Made in Torino' and 'Exclusive Brand Torino'
 - Its many hubs for innovation, research, technology and creativity, as an asset for development of the MICE markets.
- Further develop the MICE markets, as vital elements in the overall market mix for ensuring good, high yield business all-year-round;
- Develop and nurture new events that will further enhance the outstanding

assets of the city and region and draw business during off-peak times;

- Develop cultural tourism, with a strong focus on creating, promoting and selling cultural experiences;
- Develop rich visitor experiences relating to unique local resources, such as archaeology, enogastronomy, technology, industrial production; military tours (fortresses and battlefields), religious tours, Jewish heritage and performing arts – especially where there are effective, low-cost routes to niche markets;
- Expand the 'Made in Torino' programme and promote the factory tours to new markets, including business visitors, especially those coming for conferences and exhibitions;
- Further develop products that link the city with its region, for both group tour operators and individual travellers
- Enhance and strengthen the Torino/Piedmont brand, learning from the initiative 'Exclusive Brand Torino'²⁷
- Foster travelling exhibitions from the city's museums and art galleries that will be presented and promoted to create positive international awareness of the city as a city of cultural heritage.

6.3 Strategic Challenges

- Strategic action required to create faster, more direct road and rail links to French and Italian Riviera and to North West Europe; to enhance direct air services to Torino Airport; and to build a high speed link to Malpensa Airport
- Need to invest in education and training to enhance visitor welcome, improve standards of service and ensure that local communities benefit to the maximum from tourism.

²⁷ There is a consortium of 17 private companies characterized by the excellence of their products, which came together in 2012 to form 'Exclusive Brand Torino', with the main aim of fostering exports and is the first transversal network in Italy. Source: www.exclusivebrandtorino.it/ (15-06-2017).

List of interviewees

Roberto Burdese, Honorary President Slow Food Italia

Edoardo Cavagnino, Chairman of Gelati Pepino

Prof. Valentino Castellani, Mayor of Turin from 1993 to 2001

Benedetto Camerana, Chairman Automobile Museum

Paolo Corradini, Director of Public Affair at Lavazza

Piero Gastaldo, Secretary General Compagnia di San Paolo

Guido Gobino, owner of Guido Gobino Srl

Dr. Christian Greco, Director of Egyptian Museum

Massimo Lapucci, Secretary General Foundation CRT

Maurizio Montagnese, Chairman Turismo Torino e Provincia

List of Tables

Table 2.1 Arrivals and Bednights in Turin Metropolitan Area*, 2000-2016

Table 2.2 Visitor Profile and Satisfaction 2016

Table 2.3 Level of daily expenditure per person by category, 2016

Table 2.4 Arrivals and bednights for key international markets, 2016

Table 2.5 Accommodation capacity and occupancy rates Turin Metropolitan Area*, 2000-2016

Table 3.1 Development of key attractions and number of visitors, 2015

CONFIDENTIAL

List of Figures

Figure 1.1 Map

Figure 1.2 Turin's baroque style in San Carlo Square

Figure 1.3 Former FIAT factory of Lingotto, now a multipurpose centre

Figure 1.4 The Royal Residence of Venaria

Figure 2.1 The Egyptian Museum

Figure 2.2 The National Automobile Museum (left) and Sacra di San Michele (right)

Figure 2.3 Salone dell'Auto (Automobile Show), in the Park of Valentino

Figure 2.4 Turin Metropolitan Area

Figure 3.1 The Mole Antonelliana building, the icon of Turin (left) and the Cinema Museum, inside the Mole Antonelliana (right)

Figure 4.1 Structure of the DMO in Piemonte

Figure 4.2 Map of Piedmont/Piemonte

Figure 5.1 Eataly shop and restaurant (combined) at Lingotto

Figure 5.2 Gelati Pepino

Figure 5.3 Guido Gobino

Figure 5.4 Lavazza 'La Nuvola' building

Figure 5.5 Lavazza 'La Nuvola' building

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