International Seminar on Innovation in Tourism Planning

Viena, 12-13 September 2019
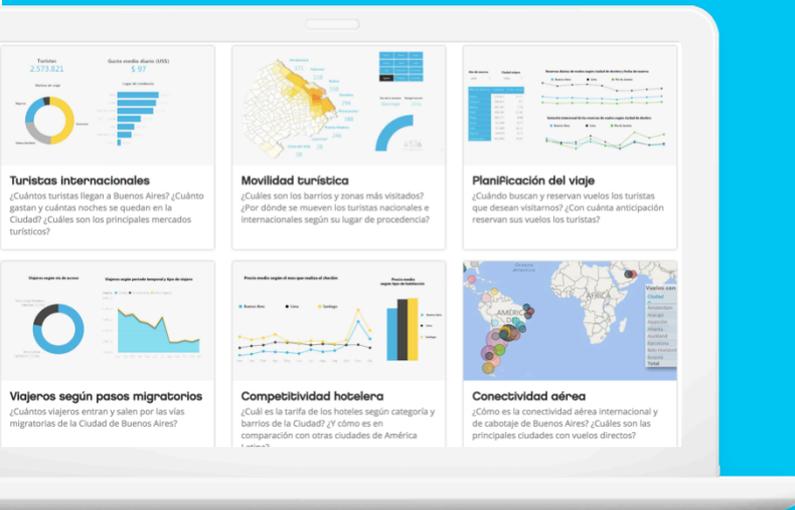
Big Data driven decisions for tourism policy in the city of Buenos Aires

Federico Esper, General Director of Market Intelligence and Observatory Buenos Aires Tourism Board

In 2018 **2.7 million international tourists** arrived to the city of Buenos Aires driven by the growth of air connectivity and generating an **increase in spending** of **25%**

Impact on local economy

USD 3,000 Million

> generated by domestic and international tourists

=

3%
of the city's **GDP**

International tourism spending equates to **23%** of the city's **exports**
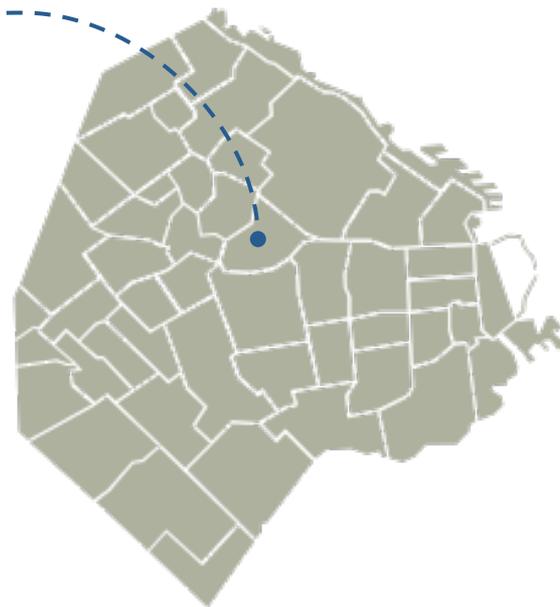
Strategic Vision of the Observatory

¿What we do?

- Collect accurate data

- Transform information into knowldege

- Comunicate key trends for the travel and tourism industry

¿Why?

- To position Tourism as a strategic activity for our city

- To orientate decision making processes at public and private level

¿For whom?

- Government
- Private sector
- Investors
- Entrepreneurs
- Tourism suppliers
- Associations
- Academia
- Press and Media

Our team is focused in 3 main areas of work

Economic analysis

- Economic impact
- Employment
- Investment
- Market forecasts
- International and domestic travel

Qualitative research

- Primary data collection
- Surveys, interviews, ethnografic studies, focus groups,
- Hotel occupancy
- Market segments: MICE, Cruise, Cultural, Gastronomy and Educational

Big Data

- Air connectivity
- Hospitality
- Gastronomy
- Tourist mobility
- Attractions
- Tourism expenditure

> *Tourism Intelligence System*

360° of the tourist experience

1 Obtaining data

- Digital platforms
- Social networks
- Administrative / electronic records

2 Processing and Analysis

- Methodology is key
- Reports easy to understand

3 Decision making

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

4 Effects on tourism policy

- Tax Incentives Law
- Marketing and communication strategies
- Evaluation of actions/results

Tourist experience

Tourism Intelligence System

turismo.buenosaires.gob.ar/es/observatorio

Turistas internacionales
¿Cuántos turistas llegan a Buenos Aires? ¿Cuánto gastan y cuántas noches se quedan en la Ciudad? ¿Cuáles son los principales mercados turísticos?
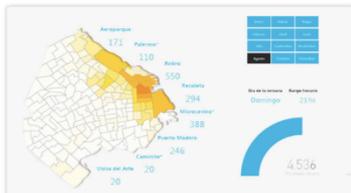
Movilidad turística
¿Cuáles son los barrios y zonas más visitados? ¿Por dónde se mueven los turistas nacionales e internacionales según su lugar de procedencia?

Planificación del viaje
¿Cuándo buscan y reservan vuelos los turistas que desean visitarnos? ¿Con cuánta anticipación reservan sus vuelos los turistas?

Viajeros según pasos migratorios
¿Cuántos viajeros entran y salen por las vías migratorias de la Ciudad de Buenos Aires?
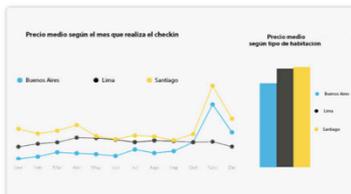
Competitividad hotelera
¿Cuál es la tarifa de los hoteles según categoría y barrios de la Ciudad? ¿Y cómo es en comparación con otras ciudades de América Latina?

Conectividad aérea
¿Cómo es la conectividad aérea internacional y de cabotaje de Buenos Aires? ¿Cuáles son las principales ciudades con vuelos directos?

➢ **Public innovation tool** addressed to tourism sector.

➢ **Big Data for the improvement of decision making and competitiveness**.

➢ Dynamic and interactive **statistics tool open to public**.

Tourism Intelligence System

A new tool for decision-making

- **More information**: 820 million records.

- **New information**: Big Data provide prospective trends, such as flight reservations.

- **Better visualization**: dynamic and interactive charts and maps.

- **Free public access:** an open platform that democratizes knowledge.

Potential users

- Entrepreneurs
- Investors and Developers
- Hotels
- Travel agencies and service providers
- Airline, cruise and transport companies
- Shops and gastronomic establishments
- Museums, cultural and leisure places
- Congress and convention organizers
- Chambers and associations
- Press media
- Researchers and academic community
- Public sector

Air Connectivity

Asian Market

The main connections of the Chinese tourists are made via Doha and Dubai.

Meanwhile, the Japanese tourists prefer to arrive via the United States and the route with New York became more relevant since the beginning of United Airlines operations.

% OF JAPANESE (TOP 10). JANUARY-MAY 2018.

City	Value
San Pablo	13,1
Dallas	10,2
New York	9,9 → +5 p.p.
Santiago de Chile	9,0
Frankfurt	6,3
Houston	6,3
Lima	5,0
Dubai	4,0
Atlanta	3,5
Toronto	2,9

% OF CHINESE (TOP 10). JANUARY-MAY 2018.

City	Value
Doha	14,2 → -6 p.p.
Amsterdam	14,0
Dubai	13,9
Santiago de Chile	10,1
Dallas	9,2
Lima	5,8
Frankfurt	4,9
Nueva York	4,8
París	2,6
San Pablo	2,5

Source: Buenos Aires Tourism Board in cooperation with National Secretariat of Tourism
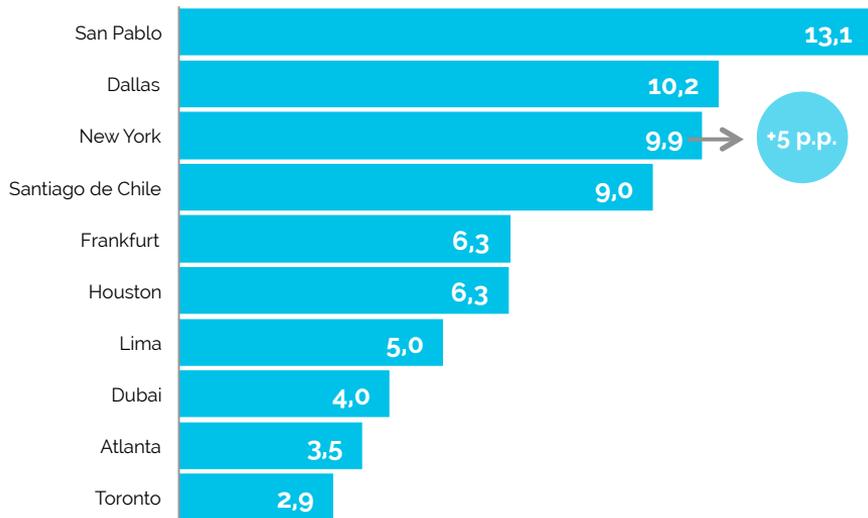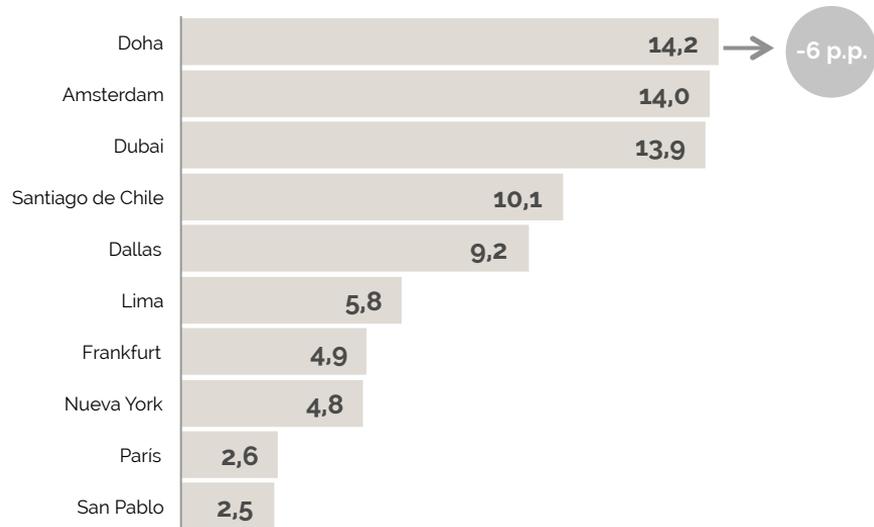
Hospitality: Competitiveness,
rates and tourist´s opinions

Buenos Aires online hotel offer

LOCATION OF BUENOS AIRES HOTELS BY NEIGHBORHOOD. FEBRUARY 2018

Categorías
- 4 estrellas
- 5 estrellas
- Otros
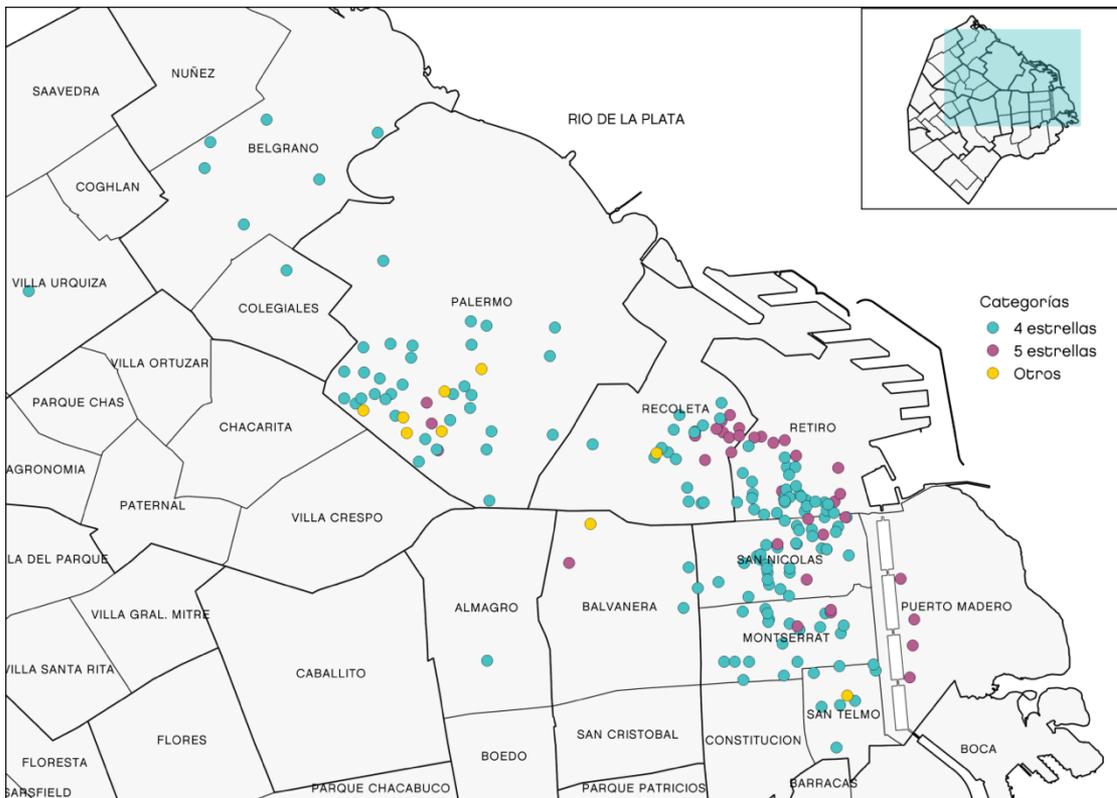
- 4 stars
- 5 stars
- Other hotels

Source: Buenos Aires Tourism Board based on hotel online platforms

Tourist´s evaluation of hotel services

According to different components of hotel services

AVERAGE RATING OF TOURISTS IN HOTELS, BY CITY. FEBRUARY 2016 - JANUARY 2018

4 STARS

5 STARS
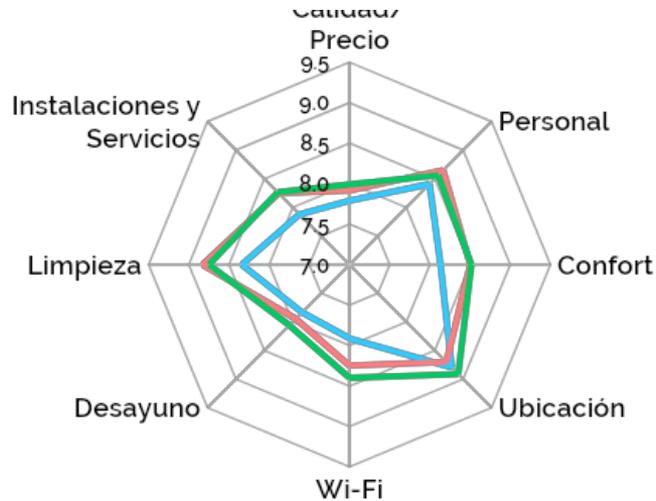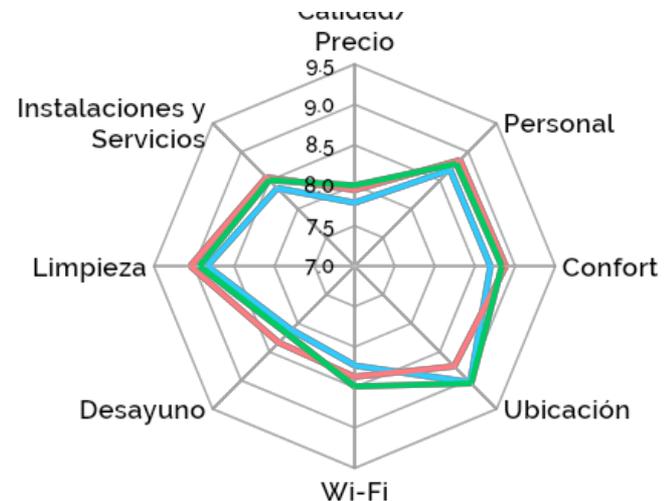
Buenos Aires (general 8.2) — Lima (general 8.5) — Santiago (general 8.5)

Buenos Aires (general 8.6) — Lima (general 8.7) — Santiago (general 8.7)

Source: Buenos Aires Tourism Board based on hotel online platforms

Gastronomy

¿Where are the gastronomy establishments located?

RÍO DE LA PLATA
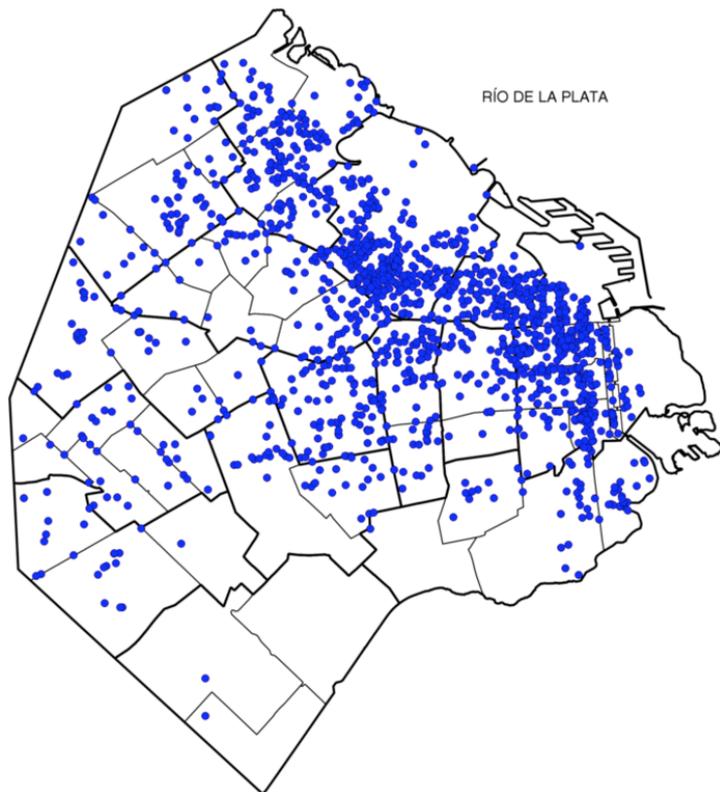
We identified **10 types of food and cuisines** according to their origin and cultural identity.

The typical gastronomy of Argentina (grills and pizzerias) has a greater presence in all neighborhoods.

Número de establecimientos
- ● Argentina
- ● Europea
- ● Comida rápida
- ● Vegetariana, vegana, etc
- ● Pizzería
- ● Parrilla
- ● Asiática
- ● Latinoamericana
- ● Kosher o halal
- ● Otras comidas

Source: Buenos Aires Tourism Board based on gastronomy online platforms

¿Which are the most commented and best rated foods?

Healthy food and the asado are the best qualified food types with the highest number of comments per establishment in Buenos Aires.

Rating

4.3

Most commented

4.2 — Saludable

Kosher / Halal

Latinoamericana

4.1 — Otras · Europea · Parrilla

Asiática

4.0 — Argentina

Pizzeria

Best rated

3.9 — Rápida

3.7 — Cantidad de restaurantes

3.6

0   50   100   150   200   250   300   350   400   450

Number of opinions by establishment
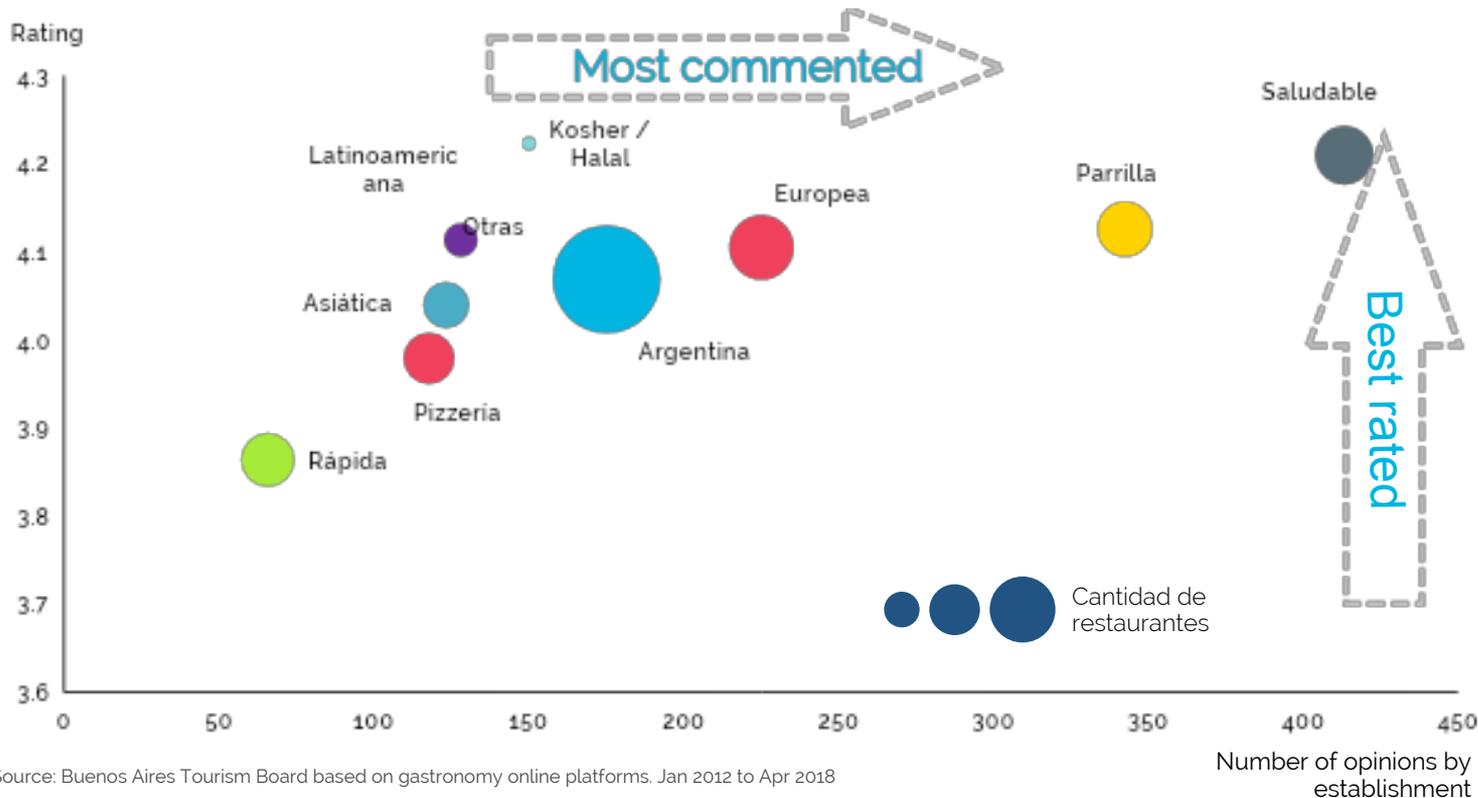
Although the number of establishments is low, the type of religious food (Kosher or Halal) is the best rated by TripAdvisor users, showing that they respond well to the needs of the niche.

Source: Buenos Aires Tourism Board based on gastronomy online platforms. Jan 2012 to Apr 2018

Rating and comments by neighborhood

Negative comments (%). Years 2012- 2018

'12	'13	'14	'15	'16	'17	'18
9	8	8	10	11	14	17
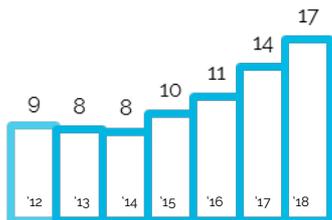
Palermo is the most commented neighborhood (38% of total comments).

The staff and the service are the most negative points.

The couples (41%) are the ones who commented the most and they did it about Argentine and healthy food in similar proportions.
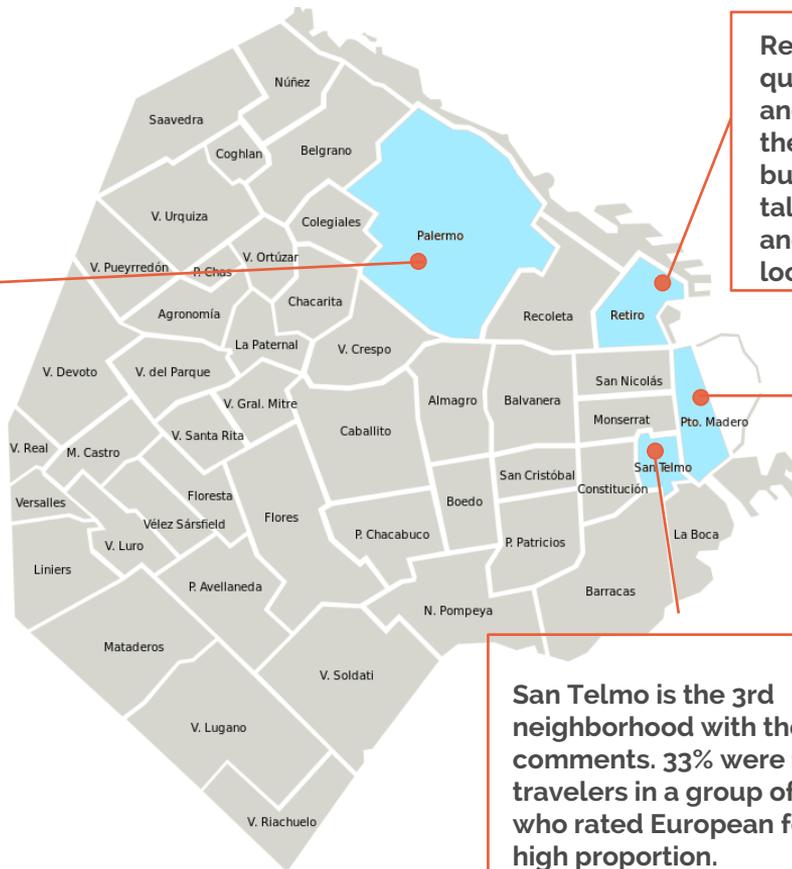
Retiro is the best qualified neighborhood and is characterized by the comments of business travelers, who talk about food (healthy and Argentine) and location.

Comentarios negativos (%). Años 2012-2018

'12	'13	'14	'15	'16	'17	'18
6	5	4	5	6	6	7
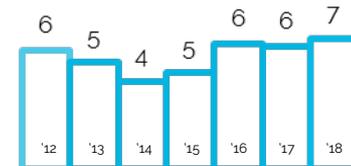
In Puerto Madero the comments are mostly from families and they talk about Argentine food and grill.

Comentarios negativos (%).

'12	'13	'14	'15	'16	'17	'18
13	10	10	11	14	16	16

San Telmo is the 3rd neighborhood with the most comments. 33% were from travelers in a group of friends who rated European food in a high proportion.

Comentarios negativos (%).

'12	'13	'14	'15	'16	'17	'18
10	8	7	7	10	12	11

Map neighborhoods: Núñez, Saavedra, Coghlan, Belgrano, V. Urquiza, Colegiales, V. Pueyrredón, V. Ortúzar, P. Chas, Palermo, Chacarita, Agronomía, V. Crespo, Recoleta, Retiro, La Paternal, V. del Parque, V. Devoto, V. Gral. Mitre, Almagro, Balvanera, San Nicolás, Caballito, Monserrat, Pto. Madero, V. Real, M. Castro, V. Santa Rita, San Cristóbal, Constitución, San Telmo, Versalles, Floresta, Boedo, Vélez Sársfield, Flores, P. Patricios, La Boca, V. Luro, Liniers, P. Chacabuco, P. Avellaneda, Barracas, N. Pompeya, Mataderos, V. Soldati, V. Lugano, V. Riachuelo

Source: Buenos Aires Tourism Board based on gastronomy online platforms

¿What do consumers talk about when they comment?

48% of the guests spoke about their general experience in the establishments and 20% of the English speakers (11% of the total comments are in this language) talked about the food category.

Most frequent words in the Restaurant category. Years 2012-2018.

Most frequent English words in the food category. Years 2012-2018.

10% of the comments were negative.
Frequent words in positive comments: food, attention, environment.
Negative words: food, tables.

9% of the comments in English were negative.
Frequent words in positive comments: delicious, food.
The references to Argentine foods stand out: meat, pizza, empanadas, beef.

Source: Buenos Aires Tourism Board based on gastronomy online platforms

Tourist mobility

¿How do travelers move around the different neighborhoods of the City?

BUSIEST SCHEDULES FOR BRAZILIAN TOURISTS, ACCORDING TO TOURIST AREA. SECOND SEMESTER 2017.

Plaza Serrano
20pm to 01am and Saturdays from 14pm to 17pm

Peatonal Florida/Colón
17pm to 21pm

Plaza de Mayo
11am to 14pm

Puerto Madero
13pm to 16pm and 20pm to 24pm

Caminito
11am to 14pm, with peak at 12am

Source: Buenos Aires Tourism Board based on Telefonica Argentina
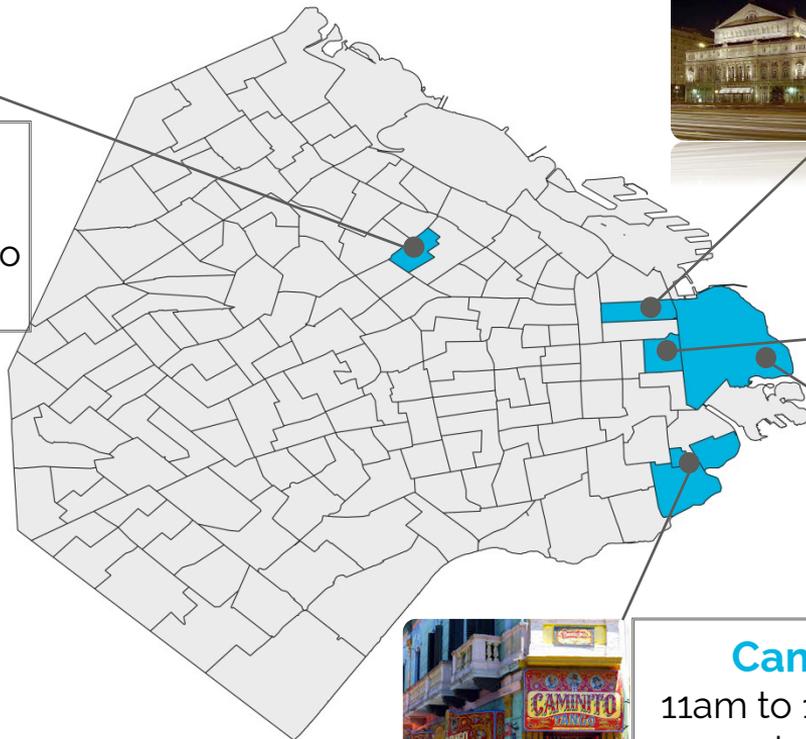
Neighborhoods: San Telmo

Map of San Telmo neighborhood based on mobile phones coverage cells.

PUERTO MADERO

MONSERRAT

Mercado de San Telmo

Plaza Dorrego

SAN TELMO

CONSTITUCIÓN

LA BOCA

San Telmo

■ Celda de análisis
□ Celdas aledañas
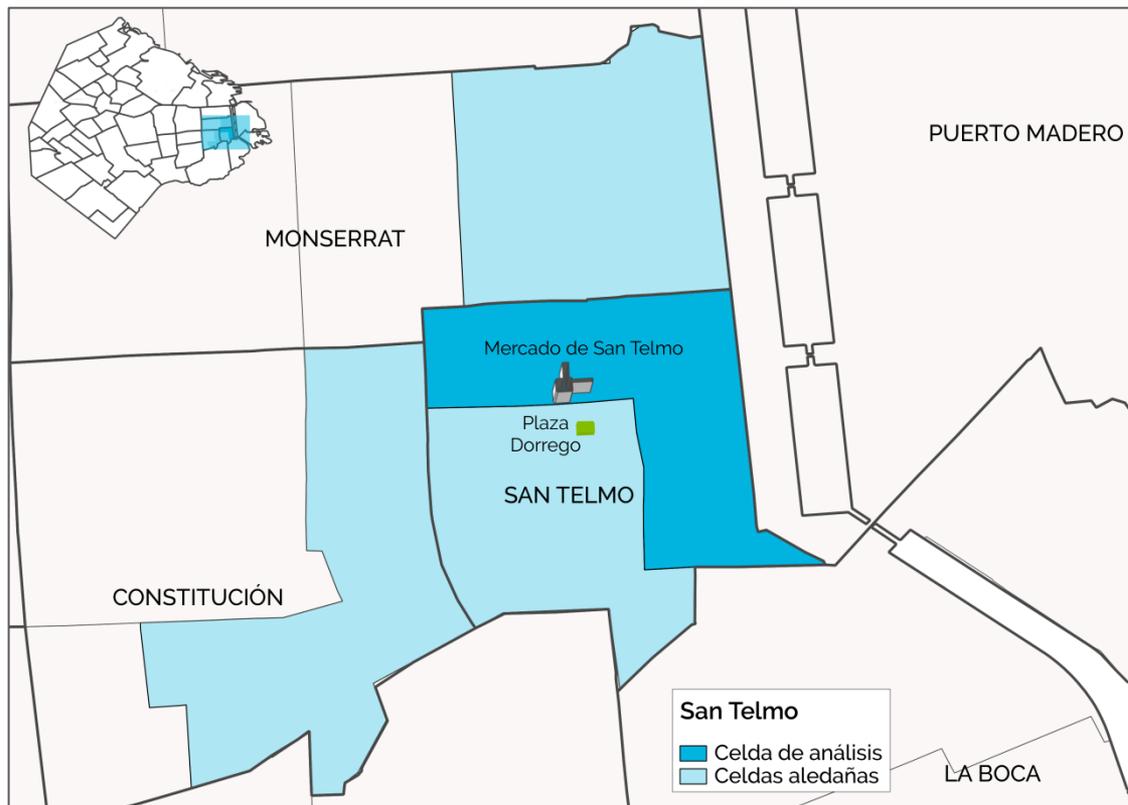
FAIR OF SAN TELMO

SAN TELMO MARKET

PLAZA DORREGO

SAN TELMO MARKET

Source: Buenos Aires Tourism Board based on Telefonica and Openstreetmap

Gay **Pride** in Buenos Aires **2017**

At the peak of the event (19 pm) we estimate that 25 thousand people participated in the parade (of a total of 103 thousand that were in the area). Of the people present in the area, 54% were residents of the City, 39% residents of the GBA and 7% tourists (national and international).

MAP OF THE AREA WHERE THE EVENT WAS CELEBRATED.
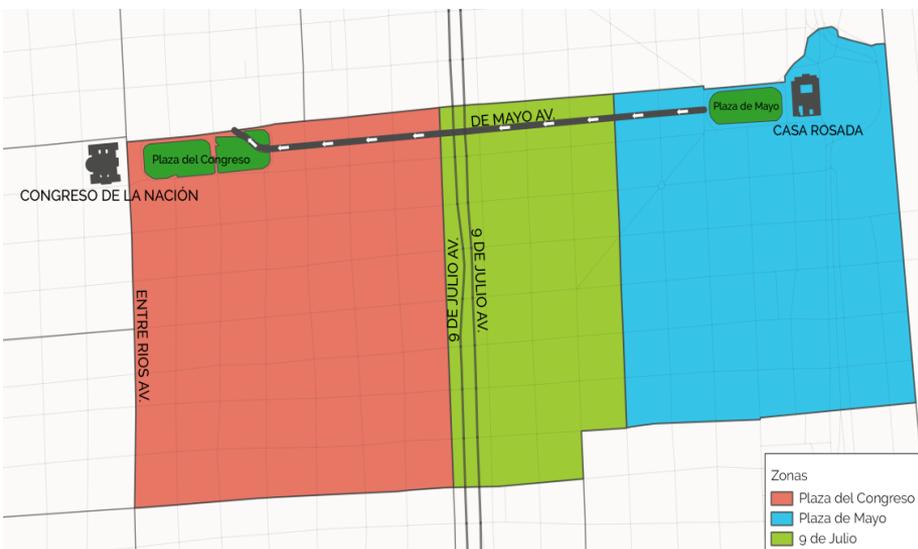
DIFFERENTIAL OF THE VOLUME OF PEOPLE BETWEEN THE DAY OF THE EVENT AND THE REST OF THE SATURDAYS OF THE MONTH BY AREA. YEAR **2017**

Persons in thousands

- Plaza del Congreso
- Plaza de Mayo
- Av. 9 de Julio

10,2 10,5 19

Hour of the day

Map labels:
DE MAYO AV.
Plaza de Mayo
CASA ROSADA
Plaza del Congreso
CONGRESO DE LA NACIÓN
ENTRE RIOS AV.
9 DE JULIO AV.
AV. 9 DE JULIO

Zonas
- Plaza del Congreso
- Plaza de Mayo
- 9 de Julio

Source: Buenos Aires Tourism Board based on Telefonica Argentina

Sport and musical Events

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TOURISTS BY TIME RANGE ON SATURDAYS OF SEPTEMBER 2017. VÉLEZ STADIUM AREA.

NATIONAL TOURISTS

Domestic tourists

02-sep-17 09-sep-17 16-sep-17
23-sep-17 30-sep-17

Bon Jovi Show

Rugby Championship
Argentina vs. All Blacks

Hour of the day

INTERNATIONAL TOURISTS

International tourists

02-sep-17 09-sep-17 16-sep-17
23-sep-17 30-sep-17

Rugby Championship
Argentina vs. All Blacks

Bon Jovi Show

Hour of the day

Source: Buenos Aires Tourism Board based on Telefonica Argentina
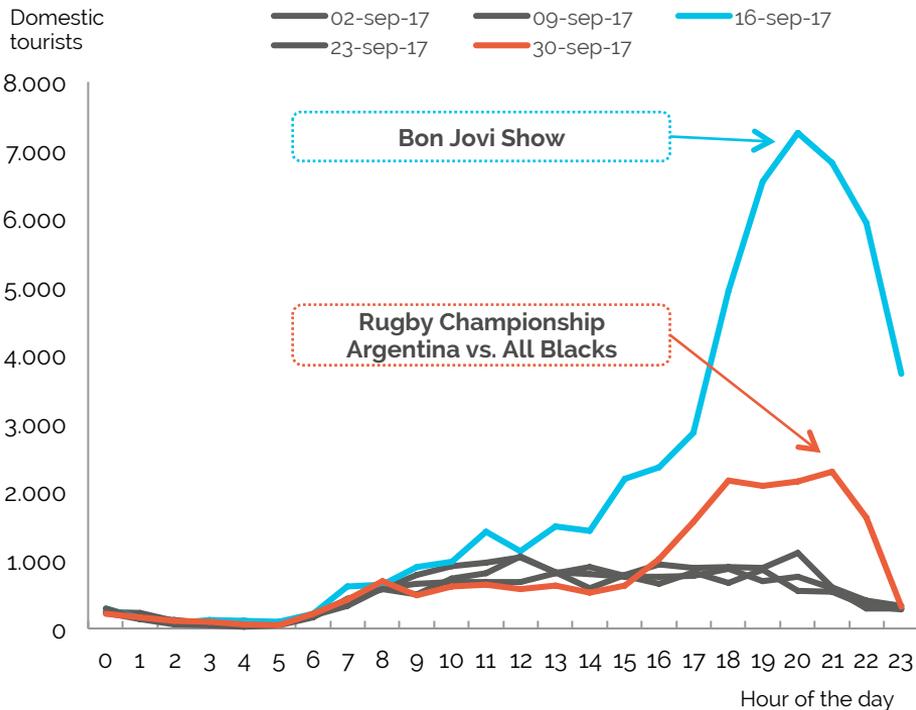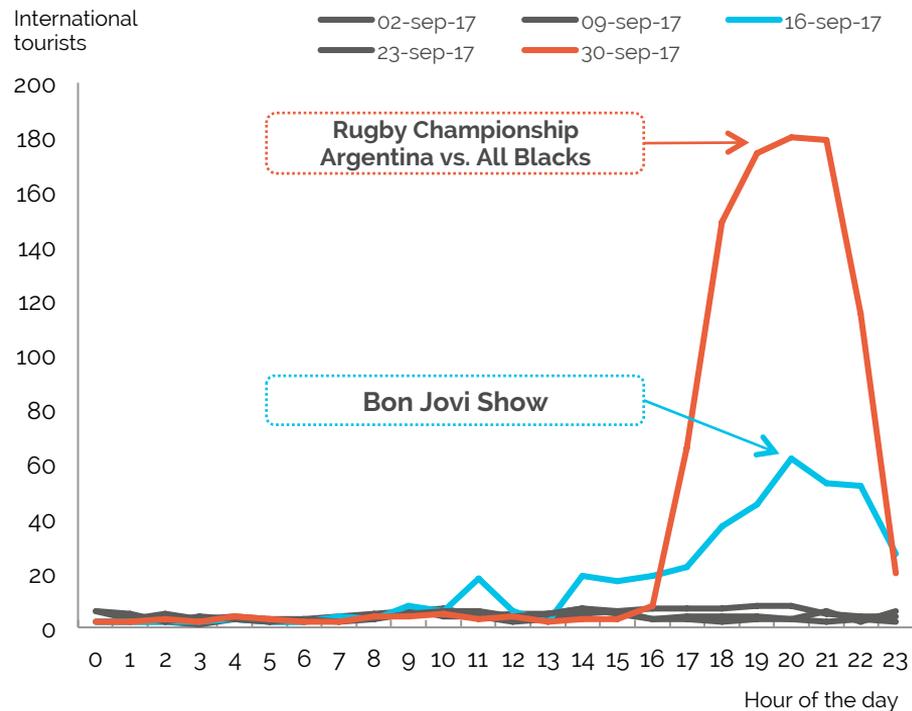
Polo Championship: international tourism

INTERNATIONAL TOURISTS, BY HOURLY SCHEDULE ON SATURDAYS OF DECEMBER 2017.
ARGENTINE POLO FIELD AREA (PALERMO).

Tourists

02-dic-17　09-dic-17　16-dic-17　23-dic-17　30-dic-17

250

Final of the Argentine Polo Championship

Hour of the day
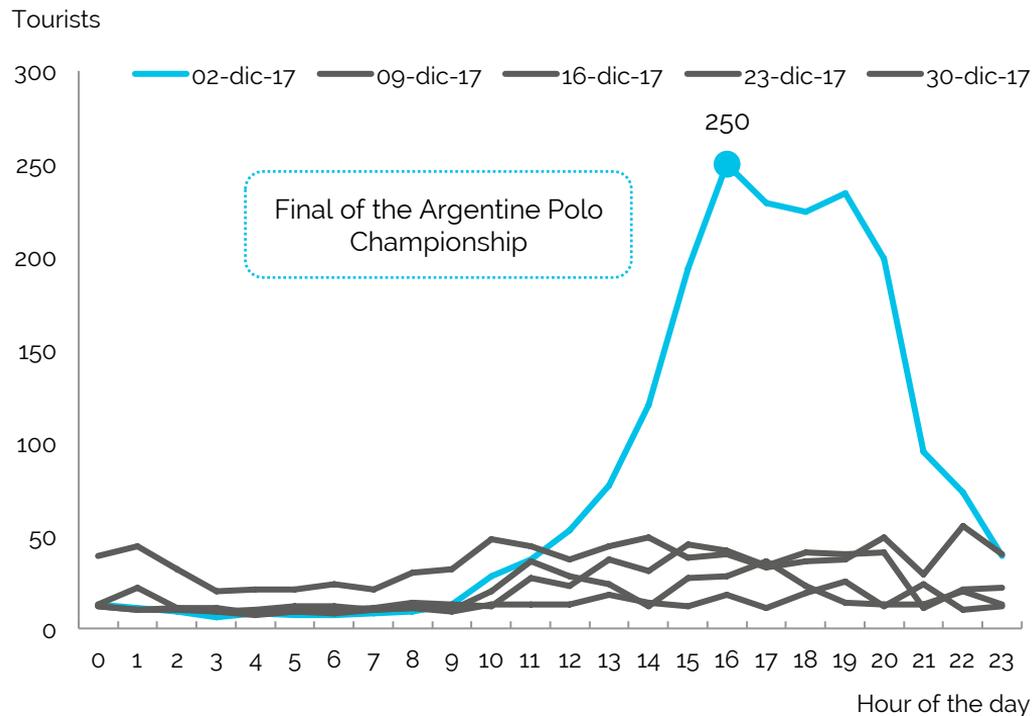
250 International Tourists

35%
16%
10%
9%
9%
6%
15%

Source: Buenos Aires Tourism Board based on Telefonica Argentina

Tourism attractions

Tourist attraction points

- 851 attractions

- Disaggregated by neighborhoods and 13 categories

- Evaluation of tourist´s opinions and ranking

- Discover potential of new attractions

- Identify improvement issues
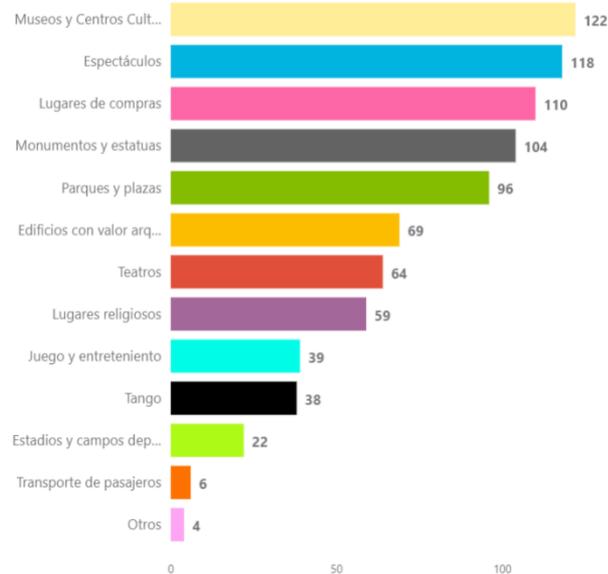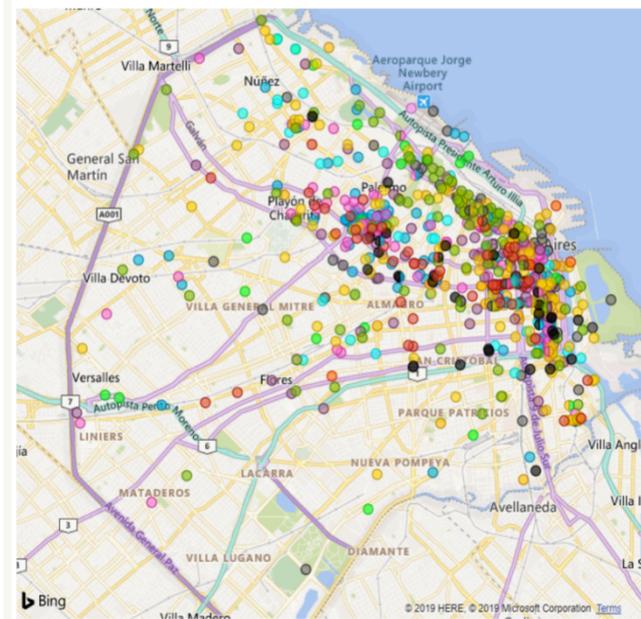
**Relationship between rating and number of comments**

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Opportunity for promotion and diversification

Best ranked and most commented

Calificacion

5,0

4,0

3,0

2,0

1   10   100   1000   10000   100000

| 292 | 384 | Atractivos 122 Comentarios | 48 | 5 |
| 0,6% | 4,6% | 15,2% | 48,7% | 30,9% |

☆☆☆ El **promedio de valoración 4/5**.
54% de los atractivos se ubican **sobre esa valoración**.

El **promedio de comentarios** por atractivo es de 330.
11,5% sobre el promedio de comentarios.
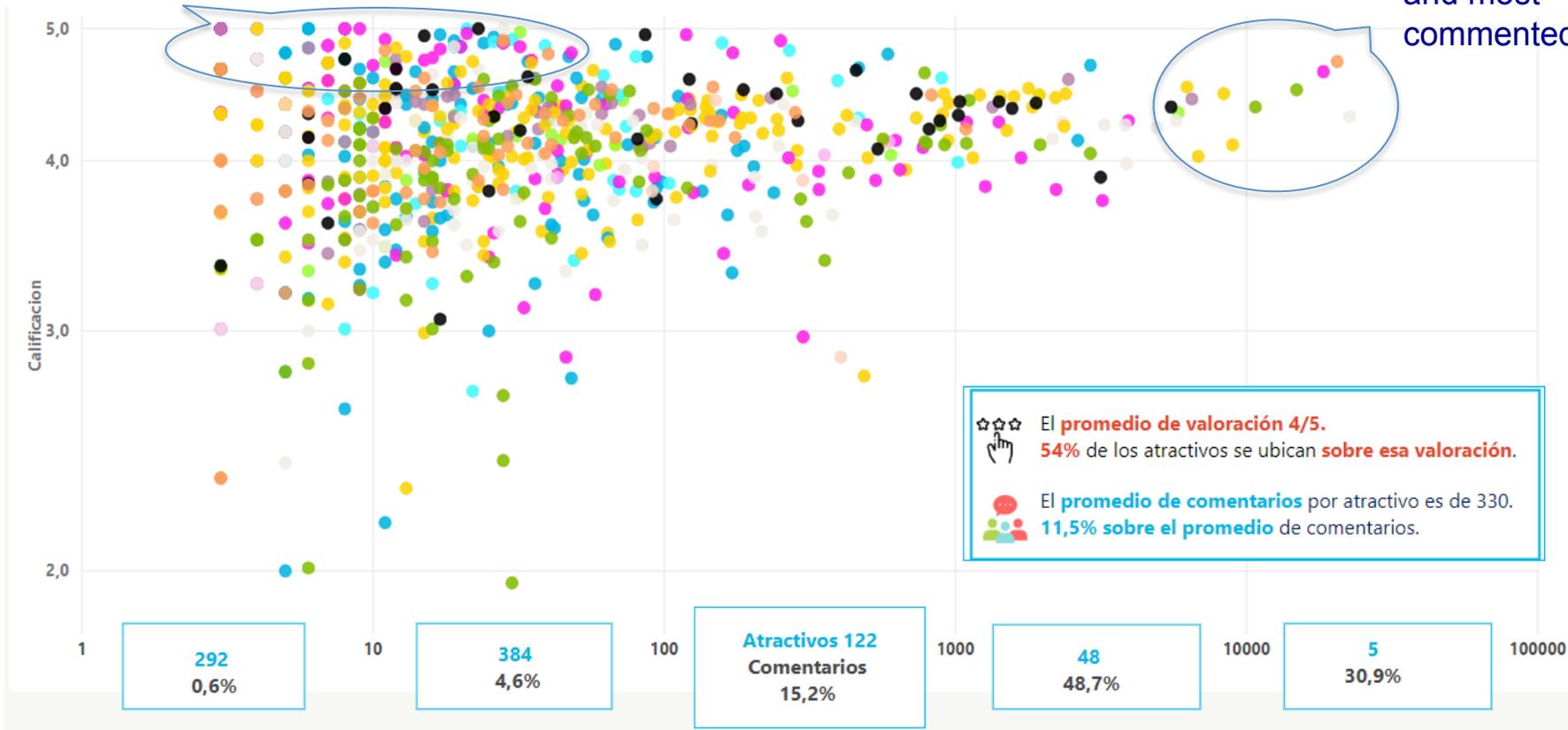
Tourism expenditure

Tourism expenditure by credit/debit cards

2019	junio	Bares y Restauran...	All

Gasto Turistico con tarjetas por Zonas
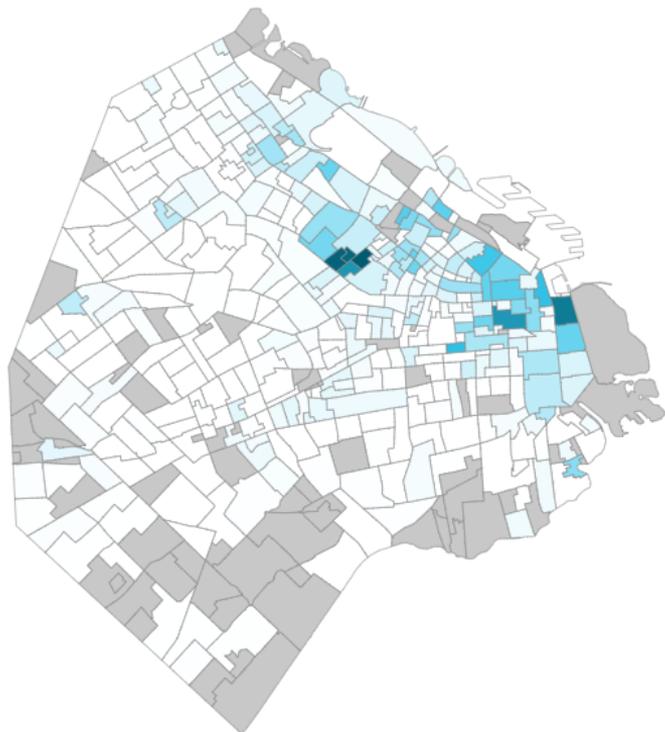
Gasto Turistico con Tarjetas

$233,44M

Ticket Promedio

$841

Extracciones de Turistas

$230M

Extracción Promedio

$2.335

Gasto Turistico con Tarjetas por Rubro

Bares y Restaurantes

$233M
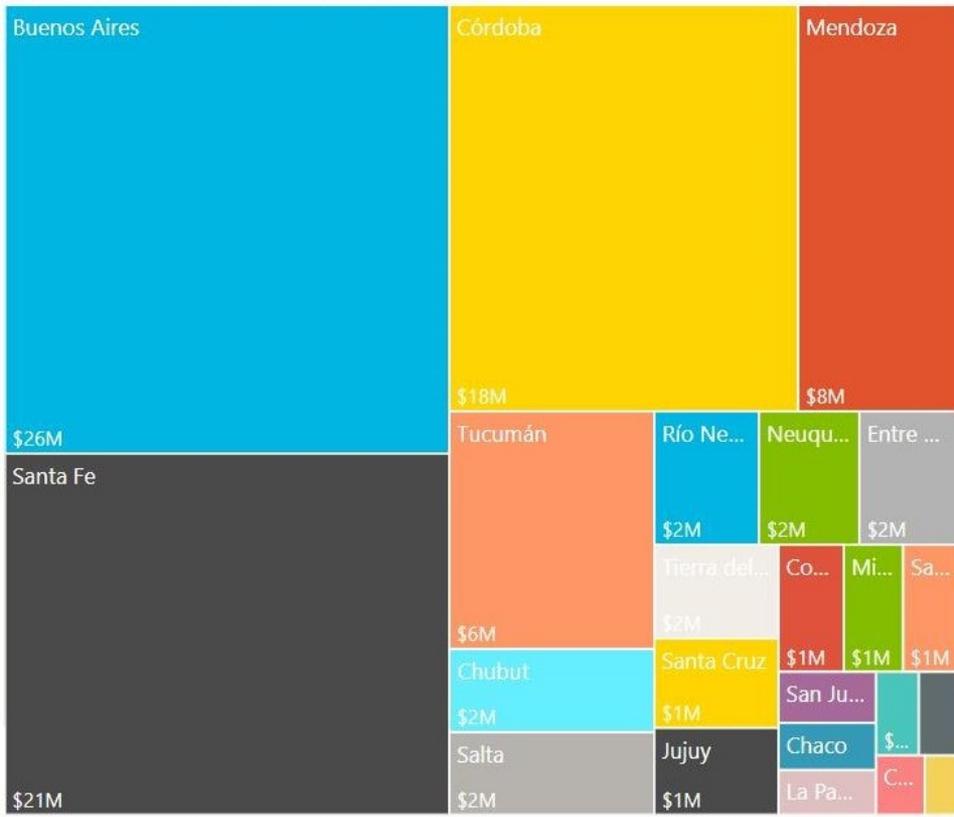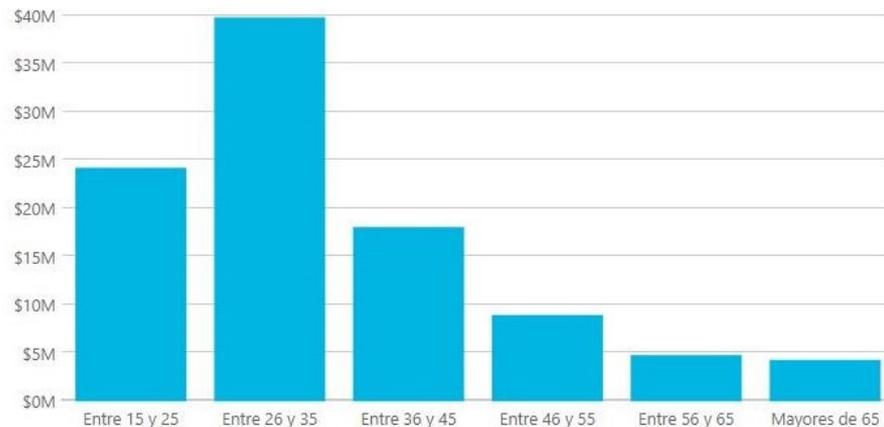
Thank you!

Federico Esper

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