TURIN
Italy



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1. Background

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 by hills in the south. It lies on the River Po, the longest river in Italy. The natural scenery, as viewed from most places in Turin, is spectacular.

Location is nevertheless a challenge for Turin in attracting tourism. Road and rail links 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 Fréjus) and a high-speed train to Paris (although the high-speed line through the Alps to Lyon has been delayed for years by local protesters – the high speed trains use traditional lines on this section). The airport, although modernized for the Winter Olympics of 2006, is still only the 13th airport in Italy by annual passenger numbers[1]. Fast train or road connections almost invariably pass through Milan rather than Turin, leaving Turin at a competitive disadvantage.

Figure 1.1 Location of Turin



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

1.2 History

Turin was founded by the Romans more than 2,000 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 1500s when the Dukes of Savoy transferred their capital from Chambéry to Turin. With the increased prominence of the Savoy family, 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 baroque style,

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

which gives Turin a unique architectural heritage.

Figure 1.2 Turin's baroque style in San Carlo Square



Source: Anita Santorum (n.d.).

When the Savoy King moved the capital of Italy to Florence briefly in 1864, and then to Rome, Turin had to reinvent itself as an industrial centre. 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 city's economy until the 1970s.

FIAT's success facilitated the growth of many enterprises along the supply chain – from design to components – and FIAT itself diversified into aeronautics and robotics. Other industries and service providers (e.g. telecommunications, office equipment) flourished. Turin was also the home of RAI (the Italian radio and television company), as well as gas and electricity companies.

The population of Turin reached a maximum of 1.2 million people in the early 1970s. When the oil crisis of the 1970s hit the car industry, FIAT responded by downsizing its production lines in Turin. The effect on employment and on the city's economy was dramatic. The decline continued progressively over a period of 20 years. Jobs were lost along the whole supply chain and factories closed. Urban areas that had been built in the 1950s and 1960s to host workers from other regions of Italy fell rapidly into dilapidation. Even the city centre deteriorated. Pollution had greyed all the 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 tourism 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 2001 the population of the city had fallen to 860,000 – almost a third of the population lost within 20 years. However, the population of the province of Turin remained at around 2.2 million. With some industries relocating outside the city boundaries and more occupational opportunities arising in small and medium-sized enterprises outside Turin, people moved out in search both of jobs and a higher quality of living. The current population of Turin is 890,000.

1.3 Turin reinventing itself – the Phoenix rises

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



Source: TTP (n.d.).

In 1991 the former FIAT factory of Lingotto 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 election in 1993 of Professor Valentino Castellani, a politically independent mayor. His formidable administration introduced a new vision for the city and an innovative, community-centred, approach to its realization. This involved many stakeholders from the private and public sector, including the University, Polytechnic and grass roots organizations. It also introduced thorough data collection and strategic planning, 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 and sustainability, as well as building on traditional and existing resources[2]. Turin did not reject its industrial (and car industry) tradition, rather seeking to transform disused factories into multi-purpose centres. One of the taglines promoting the transformation

[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.

was *'la penetrazione della città dentro l'industria'* (the city enters the factories).

During his first term in office, Professor Castellani implemented an Urban Masterplan to regenerate and renovate the city centre and run-down peripheral areas.

The initial successes led to Professor Castellani's re-election for a second term, during which the city introduced its First Strategic Plan and successfully bid for the 2006 Winter Olympics. This process led to a series of investments and actions which completely transformed Turin.

Figure 1.4 The Royal Residence of Venaria



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

Key elements included the renovation of selected urban areas, reutilization of disused factories, renewal of museums and landmarks, the creation of pedestrian areas in the city centre, and the improvement of public transport (including construction of the metro line, the modernization of Caselle airport and investments in road and rail networks linking Turin with surrounding areas and other cities, especially Milan and Lyon), and investment in education, research and innovation.

This transformation created the perfect climate for initiatives from the private and non-profit sectors. For example, the internationally renowned Slow Food movement (and its spin-off Eataly) started in Bra, a small town 50 kilometres from Turin at the doors of the wine and gastronomy region of Langhe-Monferrato, and chose Turin for 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, telecommunications 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; now, it and the Egyptian Museum are Turin's top attractions in terms of visitor numbers. Both the Egyptian Museum and the Automobile Museum have been dramatically improved 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.

Turin also hosts internationally renowned events and festivals, with themes ranging from food to art, books, movies, music and sport. Turin had been host of an international motor show from 1900 to 2000; 15 years later, the show returned with a new outdoors formula which has proved very successful. Since 1988, Turin has been

home to Italy's most important book fair (Salone Internazionale del Libro). 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 the image of the city and attract visitors from all over the world. Turin is now not only a compelling tourism destination, but also a vibrant and liveable city.

2. Tourism in Turin

2.1 Overview of Turin's leading tourist attractions

2.1.1 Culture and heritage

A primary focus of the transformation of Turin has been on culture and heritage. In previous centuries, under the rule of the Savoy family, the city had always given importance to art and culture. For example, the Egyptian Museum dates to 1824, when the Duke of Savoy bought the initial collection. Turin was also the first Italian city to have a collection of modern art as part of its Civic Museum, which opened in 1863.

Figure 2.1 The Egyptian Museum



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

Several museums and galleries have undergone recent renovation and expansion. Some – including 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 entertainment and education.

The principal cultural 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 the 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 and educational in its presentation, in 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**, a large permanent 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 kilometres from Turin.

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% in average daily room rate (ADR) – to more than EUR 100 – and of 30% in revenue per available room (RevPAR), to more than EUR 80[3].

Figure 2.2 The Sacra di San Michele



Source: Anita Santorum (n.d.).

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 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. It has created many unique products, including chocolates, pastries, ice cream, coffee and Vermouth. The first solid chocolate was produced in Turin in the early 1820s by Caffarel, and the first chocolate-covered ice cream on a stick was invented by Pepino in 1939. The confectionery factory that in 1857 produced the prime minister's favourite candies, is celebrating its 160th anniversary.

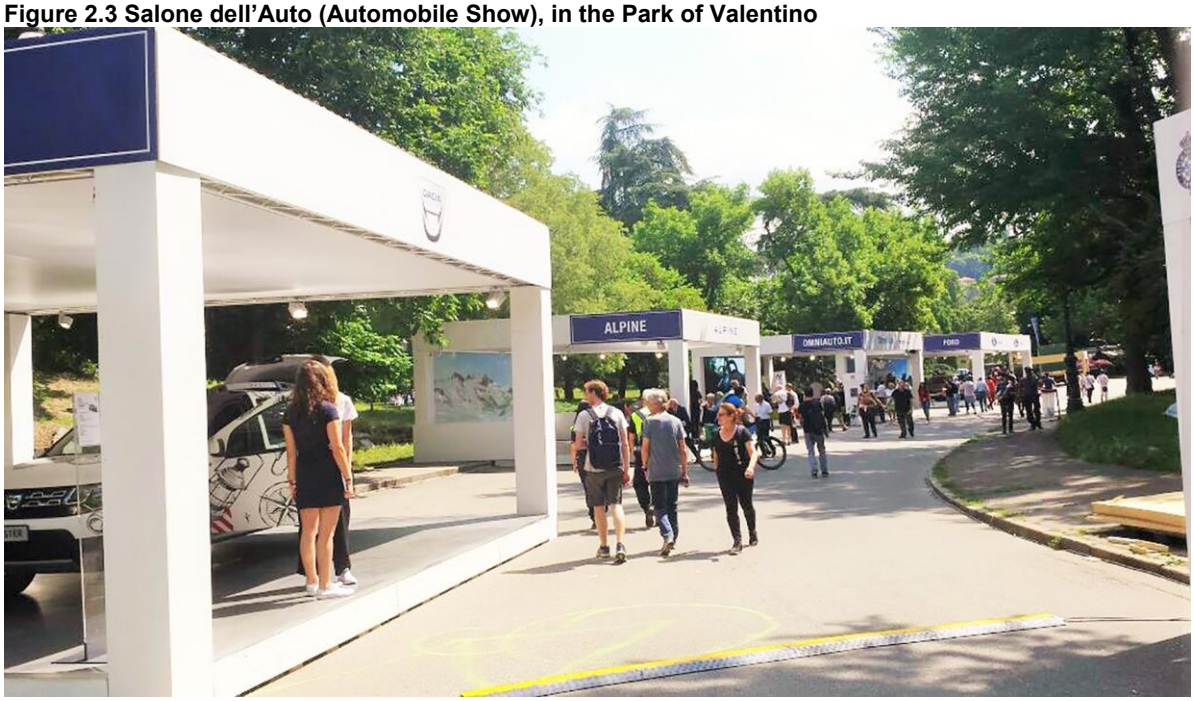
[3] RES-STR Global (2016).

2.1.4 Events

Turin hosts several international festivals and events. The most important are:

- Terra Madre Salone del Gusto, organized biannually by Slow Food, which has members in 180 countries – 1 million estimated visitors in 2016;
- Salone dell'Auto (Automobile Show), held in the Park of Valentino, with 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, 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: Turismo Torino e Provincia (TTP) (n.d.).

Other major cultural events held in Turin have included:

- Torino Jazz Festival, until 2016: in 2017, this event was given a new name, "Narrazioni Jazz", and was held simultaneously with the Salone Internazionale del Libro;
- MITO Settembre Musica – a classical music festival, in conjunction with Milan's, 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. 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. Tourism performance

2.2.1 Arrivals and overnight volume

Table 2.1 Arrivals and bednights in the Turin Metropolitan Area[a], 2000–2016

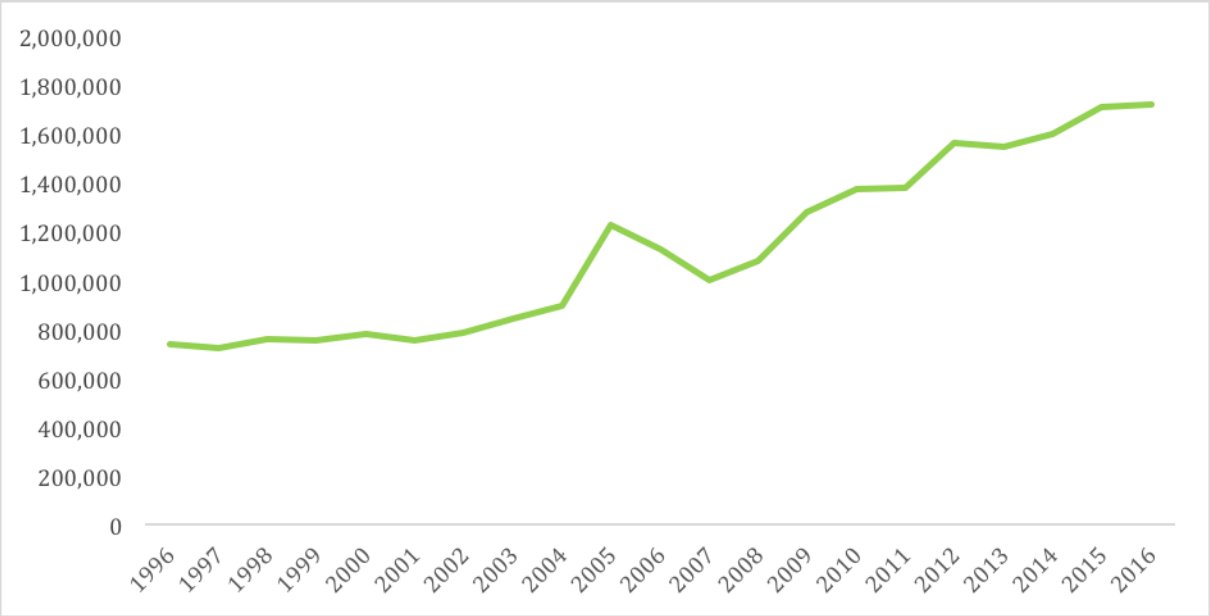
	2000	2005	2010	2015	2016
Arrivals					
Domestic	527,159	791,580	1,198,847	1,237,342	1,315,263
International	254,453	435,712	176,369	471,031	408,405
Total	781,612	1,227,292	1,375,216	1,708,373	1,723,668
Bednights					
Domestic	1,512,727	2,141,624	3,004,535	3,259,186	3,574,332
International	686,753	1,161,065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

[a] The city and its neighbouring municipalities, as shown in the map below.

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

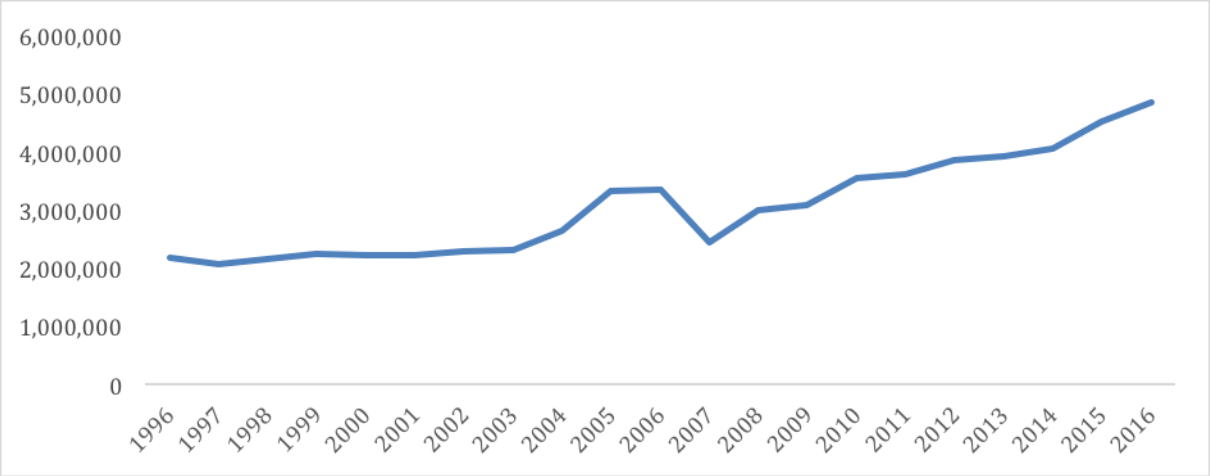
The two graphs below show that there was very modest growth in arrivals and nights between 1996 and 2004, but then an increase of about one third in 2005 and 2006, generated, if would seem, before, during and after the Winter Olympics. Tourism fell back the following year (2007), but thereafter showed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

Figure 2.4 Arrivals in the Turin Metropolitan Area, 1996–2016



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

Figure 2.5 Bednights in the Turin 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 learned 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.

Turismo Torino e Provincia (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 tourism destination.
- Evaluation of the city services was positive – based on visitor ratings of 1 to 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 Tourism revenues

Turin is the third Italian city destination in terms of revenue from tourism, which totalled an estimated EUR 1.68 billion in 2010[4]. 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 age[6].

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 EUR 109 per person in 2010-2011[8]. Levels of expenditure in each of five categories are shown in the table below.

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

Type of expenditure	< EUR 10	EUR 11–50	EUR 51–150
Accommodation	6%	44%	41%
Restaurants/cafes'	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. regions from the north and centre of Italy at a short distance from Turin.

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, the United States of America and China each generated 70-80,000 nights; and the United Kingdom, Romania, Switzerland/Liechtenstein each

[4] This number is based on the most recent available estimates for tourist expenditures for the Region of Piedmont, which totalled EUR 3.5 billion 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 Citta' Metropolitana di Torino, Torino.

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

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

between 50,000 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, 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, the United States of America and Romania had an average length of stay between 3 and 4 nights; and from elsewhere the average was between 2 and 3 nights.

2.2.5 Accommodation capacity growth and performance

Accommodation capacity (in terms of rooms and beds) 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 in the Turin Metropolitan Area[a], 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 (x 1000)	2,199	3,303	3,538	4,512	4,845
Bed occupancy rate (%)	34.3	42.7	35.9	39.6	41.8

[a] The city and its neighbouring municipalities.

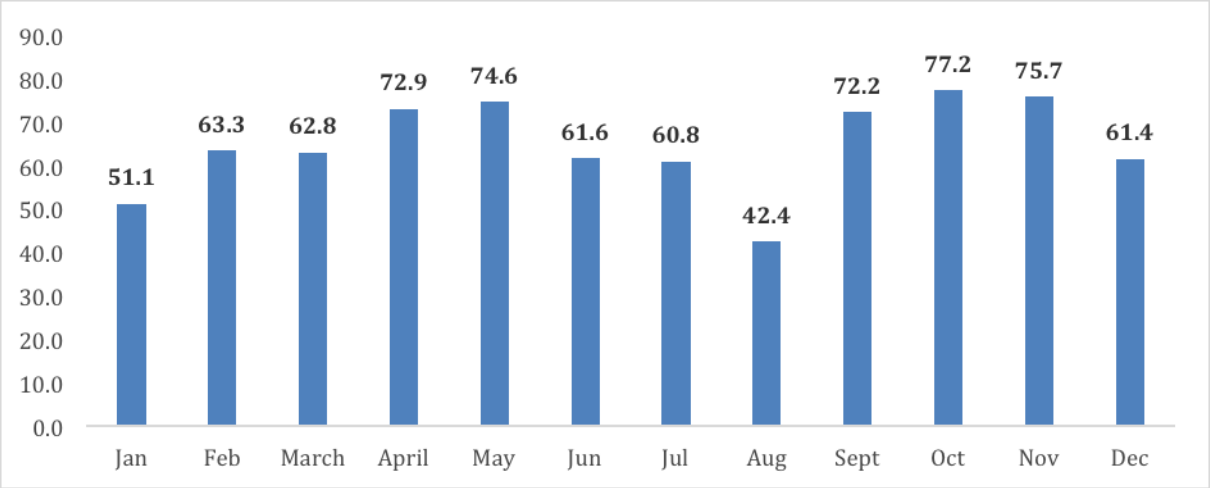
Source: Osservatorio Turistico Regionale (n.d.).

Data from 2012 to 2016 for hotels9 points to a general increase in occupancy rates (from 58% to 65%), ADR (from EUR 83 to EUR 86) and RevPAR (from EUR 48 to EUR 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 from Tuesday to Thursday and records its lowest occupancy on Sundays.

[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.

During important football matches, occupancy rates a exceed 90%.

Figure 2.6 Hotel monthly occupancy rates, 2016



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

Data on daily and monthly occupancy patterns tend to suggest 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 meetings, incentives, conferences and exhibitions (MICE) business 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 point to nearly 12,000 events (with about 15,000 conference days) in the Turin Metropolitan area, with nearly 1 million delegates and 1.3 million delegate days.

3. Strategic planning and development since 1990

3.1 City development plans and key proposals

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, it was beautifully restructured by the architect Renzo Piano as 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 fine external architecture. It re-opened in 1989.

By 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. He was 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 took steps to involve all stakeholders, forging stronger links with the municipal authorities surrounding Turin (around 50 councils), the provincial and regional governments and the rival cities of Milan and Genoa[11].

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

- Construction of the railway by-pass along the Central Spine of Turin – burying of part of the lines passing through the central corridor of the city;
- Renovation of the historical areas, including major squares and the Quadrilatero;
- Renovation of degraded peripheral urban areas; and
- 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 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. The preparation of the plan took two years and involved all relevant stakeholders, including the 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 strategic guidelines 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.

[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.

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 already perceived as a changed city, but clearly there was more to do, with a focus on innovation and technology and the challenges of immigration, health and social inclusion. Tourism and the 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 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: 230 consultees represented many different communities and interests. Turismo Torino e Provincia (TTP) was involved from the beginning and was an active player in the discussions and design of the plan.

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] It takes a systemic approach which links various factors promoting development, including business and economic growth, the efficiency of public services, the value of culture, creativity and tourism, quality of life, social inclusion, green infrastructure and sustainability.

At present, Turin is awaiting revisions to and final approval of the 2015–2025 Strategic Plan from the newly-elected city council (the regional council has no other general strategic plans of its own).

3.2 Strategic action for tourism development

3.2.1 Summary of actions taken

Many major initiatives have been undertaken over the past 20 years that have had significant direct or indirect relevance to tourism, mostly within the framework of the strategic plans noted above and with guidance from the city council. They have

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

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included:

- 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, with investment from national and EU sources;
- Creation of new university and polytechnic campuses with geographical connection to research and innovation centres;
- Construction of the metro line and completion of the railway by-pass;
- Restructuring of industrial sites as multi-purposed centres with a 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 2013[13];
- Improved public transport, as well as car- and bike-sharing initiatives.

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 Lavazza's new 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 and a restaurant, as well as exhibition and

[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 political developments have resulted in the cancellation of SMILE and the closure of Torino Smart City Foundation by the end of 2017.

substantial meetings/conference spaces.

3.2.2 Development of key attractions and venues

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 optimize the use of space and modernize the display settings and methodology. The main museums are also active participants in international networks, with exchanges and cooperation with other international museums, universities and research institutions, within Italy as well as overseas.

Figure 3.1 The Mole Antonelliana, (left) and the Cinema Museum, inside the Mole Antonelliana (right)



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

The royal residences, a network of over 20 residences and churches of the Dukes of Savoy, 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) also offer a variety of events and exhibitions.

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

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

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

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

Funds were provided from 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 Unicredit Bank).

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, in the former Fiat factory building, where there are two different entities:

- **Centro Congressi Lingotto**, which was designed by Renzo Piano. It blends history, art and culture, providing a superb combination of the past and modernity. It has 12rooms, the largest with a capacity of 2,090 m^2, and an exhibition area of 1,070 m^2.
- **Lingotto Fiere**, owned by the French company, GL Events, is an exhibition centre holding an average of 50 events per year, including trade fairs, consumer exhibitions, concerts, corporate and communication events, and medical-scientific conferences/conventions. Its has a covered area of 58,000 m^2, an outdoor area of more than 62,000 m^2, three pavilions from 7,600 to 18,000 m^2, and17 congress rooms with up to 600 seats. In addition, it includes Torino Oval (20,000 m^2), a venue built for 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.

An imminent addition to the city's meetings venues is a major new space within Lavazza's new complex 'La Nuvola'. It involves the renovation of an historic power plant building, which will become an event space able to accommodate 1,000 people, and conference rooms 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 tourism sector have been:

- An ambitious and strong vision shared by all stakeholders;
- Extensive 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 renovation and 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 the tourism industry to flourish.

The council's focus on innovation and research, including the creation of seven innovation hubs with national and international exposure, has fostered cooperation between university, polytechnic and research centres on the one hand, and the city council and the tourism industry on the other. This has contributed to enhancing the image of Turin as a city of culture and innovation.

3.2.3 Key partners

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;
- The 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 Turin;[14]
  - Lavazza;
  - Exclusive Brand Torino and its members[15];

[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] This 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.exclusivebrandstorino.it/ (15-06-2017).

- Slow Food.

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 tourism 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. Individual events, such as Terra Madre Salone del Gusto or the Salone dell'Auto, which bring 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 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, and 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, encouraging 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 important links in driving further enhancements for the city.

3.2.6 The role of digital technologies

The development of innovation and technological hubs has brought into Turin new companies and visitors. It has also brought new technologies (especially in ICT), which can be used in the tourism sector. New start-ups are expected to emerge and provide services and products to the tourism industry.

The region of Piedmont has plans to invest[16] in:

- Open data and "big data" for the tourism sector, seeking opportunities for greater monitoring, measuring and forecasting capabilities.

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

- Digitalization for businesses and organizations operating in the tourism sector (public and private), including digitalization 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);
- Bicycle sharing;
- Apartment sharing (in 2016, 17% of tourists used Airbnb and HomeAway[17]);
- Office sharing and co-working (Toolbox).

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. Residents are already using smart mobility, but more should be done to make services more accessible to tourists. Curretly, tourists can purchase four-hour and eight-hour bike sharing passes at TTP's information offices.

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 traditional accommodation industry.

4. Tourism structures and policies

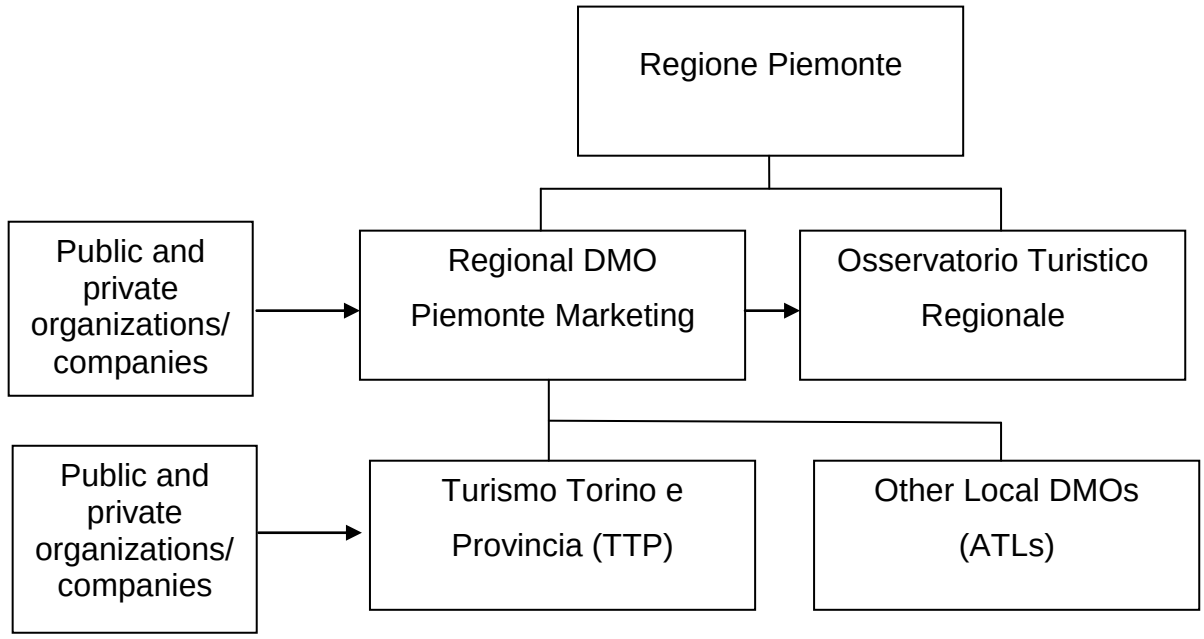
4.1 Regional tourism structure and policies

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 the Institute for Marketing of Agriculture (IMA) and Food Products of Piedmont.

The current regional destination marketing organization (DMO) structure includes Piemonte Marketing, and nine local DMOs:

[17] Osservatorio Turistico Turismo Torino e Provincia (2017).

Figure 4.1 Structure of the DMO network in Piemonte



Source: Team Tourism Consulting (2017).

Piemonte Marketing makes plans at regional level, promotes tourism in Piedmont, promotes 'made in Piedmont' products, and acts in the interests of, and coordinates the work of, the local DMOs. It can give guidelines to the ATLs but it does not have any direct control over them.

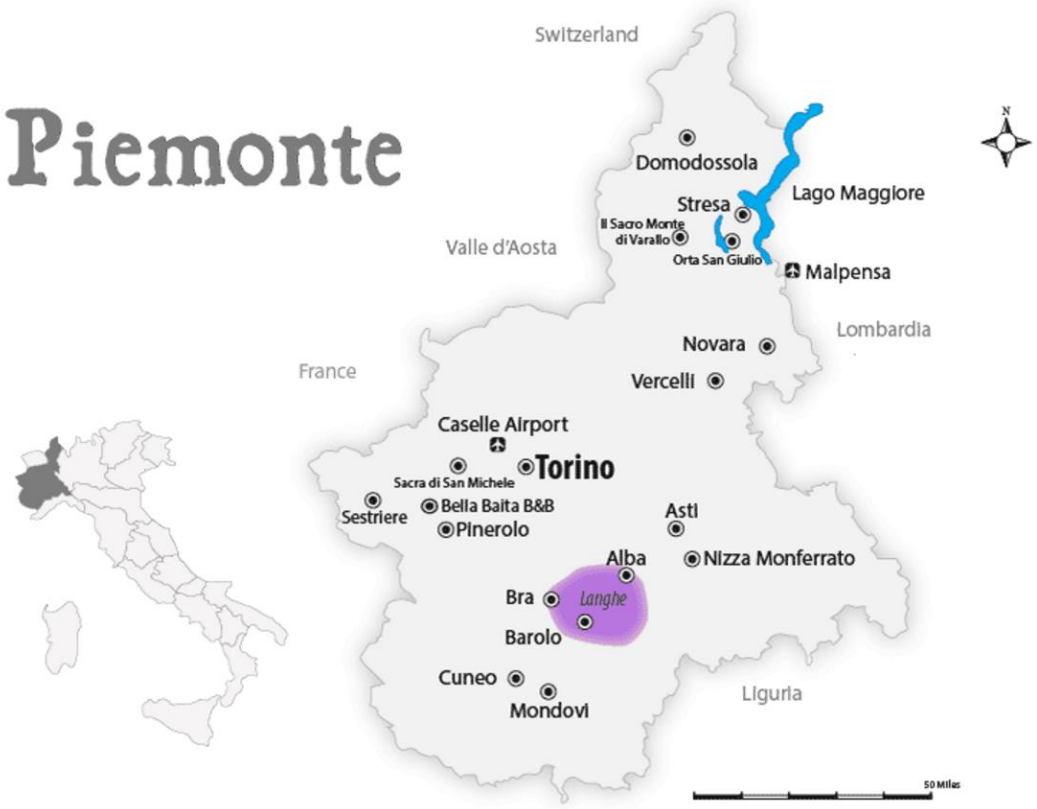
In 2009, the region of Piedmont (Piemonte) adopted a Regional Strategy for the Promotion of Tourism[18], establishing some general guidelines for the DMOs. One of the main objectives was to market specific local products under the overall Brand Piedmont. Actions outlined in the plan include:

- 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;
- Use 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 levels and is ultimately the responsibility of the Osservatorio Regionale, which is an office of the regional council.

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

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).

4.2 Turismo Torino e Provincia (TTP)

Turismo Torino e Provincia (TTP) has been operating since 1997 and is the ATL for the 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 Città Metropolitana (comprising the city councils of the greater urban area) and the Chamber of Commerce. The region and the local municipalities together own 96% of shares. The other 4% are 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 organize "all the actions for promoting Turin and its province, welcoming and providing information to tourists coming for leisure purposes or relating to MICE [events]". "TTP creates tourism products and services that meet the needs of tourists, conference participants and organizers 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 tourism 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 the Turin Metropolitan Area and 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 to contemporary art museums and exhibitions;
- 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;
- Enogastronomic[20] 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 the 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 feedback. When the products are available, TTP assists in advertising and promotion.

TTP has developed partnerships with airlines and rail operators, tour operators and

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

[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).

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 to inform, guide and facilitate visits 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 exhibitions, 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 in attendance; TTP estimates the economic impact of its 2016 congress activity between EUR 23.25 and EUR 32.55 million[21].

5. Case studies: examples of best practice

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 turn, 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 its contribution to positioning Turin on the map of gastronomy centres, not only by choosing the city for the organization of their major events, but especially by inspiring the city's restaurateurs and food producers with its principles.

The other three case studies are about private family businesses, which are so often the backbone of the economy of Italian cities. Gelati Pepino has a long history and a 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

[21] Turismo Torino e Provincia (2017).
[22] www.exclusivebrandstorino.it/ (15-06-2017).

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, quality goods and services.

Gobino and Lavazza also participate in the Made in Torino tour – the excellent programme organized by Turismo Torino e Provincia (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 factories 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 off 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 of 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, flavoursome 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 an 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 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

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

Slow Food was founded by a group of friends in 1986 in Bra, a small town in the province of Cuneo, Piedmont, 50 kilometres from Turin

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 and educational purpose, Terra Madre is more political, focusing on small communities.

5.1.2 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 was 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 1 million visitors, more than half of whom were international.

Slow Food, through its events, has been helping to promote Turin to a global audience, as a a distinctive centre for gastronomy and a city of culture, through the Salone del Gusto and 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 aspects with guided tours of the fair and 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 the 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 small and medium-sized food businesses in Turin province, including farms, artisan factories and shops, and establishes strict assessment standards for goodness, cleanness and fairness. Food businesses that 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 will be soon available in digital form Selected businesses are also engaged in a programme of promotional events, including tasting itineraries, fairs and exhibitions. The number of Masters has increased from the initial 50 to the current 182, representing 26 categories.

Figure 5.1 Eataly shop and restaurant at Lingotto



Source: Città di Torino (n.d.).

5.2 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, moved to Turin. His ice cream parlour, "Vera Gelateria Artigiana", which quickly became known as a delicacy favoured by the royal family and upper class.

Figure 5.2 Gelateria Pepino



Source: Anita Santorum (n.d.).

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 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 traditional recipes and selection of quality ingredients, in six 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 five generations and is led today by Edoardo Cavagnino, great-grandson of Giuseppe Cavagnino. 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.

[24] www.gelatipepino.it/ (15-06-2017).

5.3 Guido Gobino

Turin has a 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 present, there are only 5-6 larger local producers, butt 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 he was first placed in charge of production and later, in 1980, purchased and took over the business. Guido Gobino intensified the focus on quality and traditional recipes and processing established by his father. His company remains small (just over 40 employees), but all aspects of production and distribution are refined to the tiniest 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.

Figure 5.3 Guido Gobino chocolate factory



Source: Anita Santorum (n.d.).

Gobino has participated in several national and international competitions and has been awarded prestigious awards including, in 2008, 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" (New York Times, 16 February 2006).

5.4 Lavazza

Lavazza has been producing coffee blends for over 130 years. The first shop was opened in Turin by Luigi Lavazza in 1885. The first factory was established in1927. Lavazza's business survived the WWII coffee import blockade and rapidly expanded after the war. The 1970s economic crisis was successfully overcome through investment in study, research and innovation. In the 1980s it 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 International Space Station.

Figure 5.5 Lavazza 'La Nuvola' building



Source: Anita Santorum (n.d.).

Lavazza is a company that believes in tradition 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 for major sports, art and photography events in Turin and other cities.

In the early 2000s, when Lavazza's headquarters needed new premises, they chose a new site in consultation with the city council on the basis of the following criteria[25]:

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

The project "La Nuvola" (The Cloud) includes office buildings, public parking, gardens, a new street (with trees and free WiFi connection) and the repurposing 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 interactive Museum will include a replica of the first Lavazza shop and a history of the family and coffee processing. The museum is expected to attract 45,000-70,000 visitors per year. The project will be completed by the end of 2017.

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

6. Tourism opportunities and challenges

6.1 Overview

Turin has undergone 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 tourism destination. But the task is not complete – the process is a continuing journey. The city needs further 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 the 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 – food traditions and products with a long-standing tradition of excellence, as well as the events organized 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 year round;
- Develop cultural tourism, with a strong focus on creating, promoting and selling cultural experiences;
- Develop rich visitor experiences relating to 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[26];
- 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 the 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.

[26] 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.exclusivebrandstorino.it/ (15-06-2017).

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