PRELIMINARY STUDY REPORT

Center of Intelligence of Tourism Economics
In the State of São Paulo

São Paulo State Travel and Tourism Secretariat

Brazil

SP PRA TODOS

CIET
CENTRO DE INTELIGÊNCIA
DA ECONOMIA DO TURISMO

SÃO PAULO
GOVERNO DO ESTADO

| Secretaria de Turismo e Viagens

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1.1. THE CENTER OF INTELLIGENCE OF TOURISM ECONOMICS IN THE STATE OF SÃO PAULO - CITE

CITE is the observatory of studies and research of the São Paulo State Secretariat of Tourism (SETURSP). It was created in 2019, as part of the contract with the Investment Promotion Agency of The State of São Paulo (InvestSP), with the aim of periodically analyzing the behavior of São Paulo State's tourism segment as well as tourism sustainability. The initiative came to fill a gap in SETUR-SP, identified by the managers of the Secretariat, who took office in January 2019. In its history of activities, SETUR-SP had little data, punctual and exploratory research. In addition, it resorted to data obtained by class entities and tourism associations, but without any type of formal partnership or periodicity in the exchange of information.

Activities involving the development of business intelligence platforms, data architecture and creation of indicators for economic monitoring, destination management and the sustainability of the activity were non-existent. SETUR-SP was not a reference in pointing out data and statistics for tourist destinations, entities, educational institutions and private companies, in addition to government management itself. Other external sources were sought to meet the data needs, which were not always obtained due to the lack of focus and specific clippings for São Paulo.

The identification of this scenario was the first step towards the development of the CITE initiative within SETUR-SP, guiding all activities to date. CITE was set-up to map the tourism and events market in nine key destinations of the state of São Paulo, to point out trends and inspire new actions and guidelines for the segment. In addition to monthly indicators, such as hotel performance, passenger arrival and departures in airports and bus terminals, revenue with tourism (ICMS/ISS), tourism GDP, water and energy consumption, employment and level of tourism services in the economy, CITE conducts researches at major local events throughout the state such as Festa do Peão de Barretos, Expoflora and Dia de Nossa Senhora Aparecida.

In these surveys, items such as public profile, percentage and profile of tourists, economic impact, as well as aspects like evaluation of participants in relation to the cities and the event are investigated and analyzed. These data are used by CITE/ SETUR-SP as a way to improve the service for tourists in each city, to specify the necessary training for the personnel involved and generate campaigns and programs aimed at the target audience of the event, as well as at monitoring the sustainability of the sector.

Periodically, CITE also conducts courses and educational programs to form local researchers in São Paulo destinations, so local teams can conduct major studies that are essential to guide the actions of SETUR-SP and the entire tourism production chain in São Paulo. All research and publications produced by CITE are available for consultation and download on the turismo.sp.gov.br/ciet website.

Water Park and Resort - Olímpia SP

1.2. THE STATE OF SÃO PAULO

São Paulo is located in the southeast of Brazil. It has a total area of 248,219 square kilometers, with 645 municipalities and a population of 46.6 million people, which accounts for 22% of the Brazilian population. Its capital is the city of São Paulo. The state has a diversified economy. The metal-mechanic, alcohol and sugar, textile, automobile and aviation industries; the service and financial sectors; and the cultivation of oranges, sugar cane and coffee form the basis of an economy that accounts for about a third of the Brazilian GDP.

The state of São Paulo receives 46 million domestic and international tourists annually, according to estimates by the Foundation Institute of Economic Research (FIPE) / CITE in 2019. The region has three tourism hubs: the capital, the coast and the interior. The capital is the center of business tourism in Brazil and has the largest Brazilian hotel chain. The city also has demand in gastronomic tourism and cultural tourism. The coast of São Paulo, with 622 kilometers of extension, has 293 beaches in 16 municipalities. Inland, you can find resorts, rural and ecological tourism, cities with a temperate climate, waterfalls, caves, rivers, mountains, springs of mineral water, natural parks, historic buildings from the 16th, 17th and 18th centuries, churches in Jesuit architecture, archaeological sites and ecotourism destinations such as the Alto Ribeira Tourist State Park (PETAR).

1.3. THE NINE CITIES MONITORED BY CITE IN THE STATE

Considering the fact that the state of São Paulo has 210 official tourist municipalities, from the total of 645, and other 155 cities located in touristic regions, CITE decided to monitor tourism through the nine key cities that have the largest tourist flow in the state. Coincidentally, the cities are not concentrated in just one region and that allows CITE to assess tourism in a broader manner.

The cities monitored by CITE are Olímpia, Brotas, Ribeirão Preto, Campos do Jordão, Aparecida, Ilhabela, Santos, Eldorado and Campinas.

Olímpia is famous for its Folklore Festival and many water parks and resorts. The city receives 3 million tourists a year and has a tourist revenue of R$ 2.9 billion.

Ribeirão Preto houses the International Agricultural Technology Fair yearly, which is the biggest fair of the sector in Brazil (135,000 visitors in 2022) and is also famous for its historic buildings. It has an annual flow of 1 million tourists and a revenue of R$ 890 million.

Brotas is an ecotourism destination suited for all tastes and ages. It receives around 300,000 tourists a year and has a tourist revenue of more than R$ 580 million.

Campos do Jordão is a destination that attracts tourists for its mountain climate and also the Winter Festival (of classical music) that happens every year in July. It has a tourist revenue of R$ 1.8 billion and a flow of 1 million tourists a year.

Aparecida is famous for its Basilica of Our Lady of Aparecida that attracts around 1.2 million tourists and more than 10 million excursionists all year round and has a revenue above R$ 1 billion with tourism.

Ilhabela is located on the North Coast and consists of 19 islands and islets and is one of the most sought-after summer destinations in the state. It also holds a week-long sailing festival during the winter. The municipality attracts 580,000 tourists a year and has an annual revenue of R$ 890 million.

Armação Beach - Ilhabela SP - Photo by Ken Chu - Expressão Studio

Basilica of Our Lady of Aparecida - Photo by Ken Chu - Expressão Studio

Santos has the biggest seaport of Latin America, the main responsible for the economic dynamics of the city alongside tourism, fishing and commerce. The city is a great source for history and also holds the largest beach-front garden (in extension) in the world. The city has a tourist flow of 1.2 million visitors a year and a revenue of R$ 780 million.

Eldorado is the 4th largest municipality in São Paulo, with over 70% of its area covered by intact Atlantic Forest, which makes the municipality a great destination for nature tourism. The region receives 50,000 visitors every year and has a tourist revenue of R$ 200 million.

Campinas is known for its parks and historical buildings. It is located 1 hour by road from the capital São Paulo and it is where the Viracopos Airport, the second international airport of the state, is located. The tourist revenue is R$ 980 million and it has a year tourist flow of 1.2 million visitors.

These nine cities were selected according to objective criteria, detailed below:

Flow of tourists: considering the criteria of the World Tourism Organization, which defines the parameters for measuring tourist flows (IRTS – 2008), the cities chosen for permanent monitoring by CITE have the highest volumes of tourists throughout the year among all tourist destinations in São Paulo, excluding the city of São Paulo.

Still, all cities have regional relevance, whether they are Tourist Resorts (title granted to 70 cities in São Paulo) as is the case of Aparecida, Brotas, Campos do Jordão, Eldorado, Ilhabela and Olímpia. Also, the cities of Campinas and Ribeirão Preto, regardless of recognition for this title, are major economic and tourist centers in their respective regions, with high flows of visitors throughout the year.

Another relevant fact considered in the decision to choose cities is the availability of structured data and information with a historical series, both for the tourism sector and for other relevant indicators. In particular, data on energy consumption, water, sewage treatment, waste recycling and climate action.

State's local products - Photo by Paulo Li - Expressão Studio

It is important to emphasize that CITE, as a project of the Travel and Tourism State Secretariat, aims to support all 210 tourist cities in monitoring indicators. However, within the scope of CITE, the nine cities selected are of great importance as they represent, from the point of view of both demand and supply, large monitoring networks and support for obtaining data to expand knowledge of all activity in the state.

In order for this project to be successful, several activities were presented to the teams of the respective municipalities, in the form of training and qualification. Thus, CITE ensured that local teams were able to collect, structure and analyze data and, for this purpose, integrate a network of research and market intelligence.

The formalization of support for CITE activities with the respective municipalities was carried out so that the project could perpetuate itself and become an essential activity of the Travel and Tourism Secretariat, exemplified by the letters of support issued by all participating cities.

1.4. AN OVERVIEW OF TOURISM IN BRAZIL AND SÃO PAULO SINCE 2019

Brazil and the impacts of Covid-19

The Covid-19 pandemic, which generated the need for social distancing and restrictions on activities with the closing of borders, cancellation of trips and events of all kinds, has severely impacted world tourism. In Brazil, the sector's figures show abrupt drops in tourist flows, foreign spending, revenue and job offers. The serious economic-sanitary crisis caused a strong retraction in the demand for services.

As one of many examples, the volume of tourism revenue shrank 36.6% in 2020, compared to 2019. The drop in revenue, with the impossibility of functioning and with companies that had revenues close to zero, led to the closing of 35,500 tourist establishments with formal employment relationships, a decrease of 13.9% in relation to the businesses operating in the country in 2019.

The Monthly Service Survey (PMS/IBGE), which produces indicators that allow monitoring the conjunctural behavior of this sector in the country, investigating the gross revenue from services in formally constituted companies with 20 or more employed persons and whose main activity is a non-service financial sector, excluding the areas of health and education, showed that the Nominal Revenue from Tourism Activities fell by 38.1% in 2020 when compared to 2019.

In view of the above, 301,386 jobs in the tourism sector ceased to exist in 2020, according to CAGED data, with the peak of the fall occurring in April, with a negative balance of 155,451 layoffs. The highlight was food services, with around 96,027 layoffs in a month. This service corresponds to 62.5% of formal occupations in tourism, according to data from the 2019 Annual Social Information Report (RAIS).

In 2020, the impact of closing borders and restrictive measures for the movement of people worldwide was evident, as the Tourist Exchange Revenue showed a drop of 49.2% when compared to the previous year. Similarly, but more intensely, the Tourist Exchange Expenditure decreased by 69.3%.

Ibirapuera Park - City of São Paulo - Photo by Ken Chu - Expressão Studio

São Paulo

São Paulo started 2020 with an optimistic outlook, with a forecast of 46 million tourists, including the movement of people from São Paulo, Brazilians from other states and foreigners visiting the state and with a forecast of business, tourism and economy volume higher than 2019 by 4.5%. However, in March, the Covid-19 pandemic changed all the perspectives of world tourism.
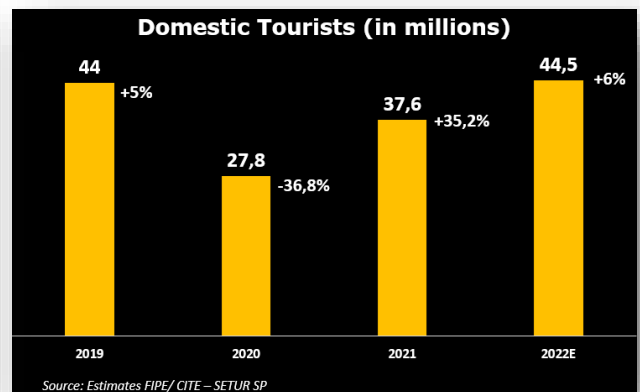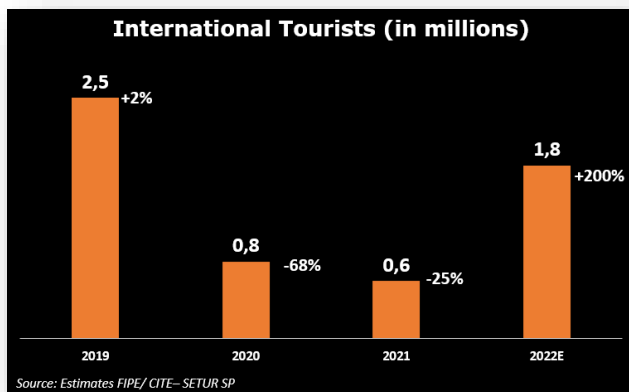
The calculations of the estimates for the year, presented in the study "*Tourist Flows: Estimates of post-pandemic resumption*" (CITE/SETUR-SP, 2020) were monitored month by month according to the results of billing, passenger flow at airports, vehicle flow on the roads, hotel occupancy rates, jobs, among other indicators.

Foreign Tourists
Within the tourist flow estimates, CITE outlined three scenarios: 907,000 in an optimistic scenario; 817,000 in a probable scenario; 724,000 in a critical scenario. After monitoring indicators between January/October 2020 and projecting the last two months of the year, the estimate for the end of the year was 779,000 international tourists, between the probable and critical scenario.

Domestic Tourists
In June 2020, CITE outlined three scenarios for closing the number of domestic tourists in 2020: 30.3 million in an optimistic scenario; 28.7 million in a probable scenario; 25.5 million in a critical scenario. After monitoring and analyzing indicators between January and December 2020, the closing estimate for 2020 was 27.8 million domestic tourists in São Paulo, considering tourists who came to the state by air, road and from the state itself who circulated throughout the state, being situated between the probable and critical scenarios previously outlined.

International Tourists (in millions)

2019	2020	2021	2022E
2,5 +2%	0,8 -68%	0,6 -25%	1,8 +200%

Source: Estimates FIPE/ CITE – SETUR SP

Domestic Tourists (in millions)

2019	2020	2021	2022E
44 +5%	27,8 -36,8%	37,6 +35,2%	44,5 +6%

Source: Estimates FIPE/ CITE – SETUR SP

Transport
São Paulo Roads
Based on data from the São Paulo State Transport Agency (ARTESP), CITE found that the flow of vehicles on São Paulo highways in 2020 remained at volumes between 75% and 80% of that seen in 2019. In absolute numbers, circulation on roads reached 965 million in the year. In 2019 this volume exceeded 1.2 billion statewide. São Paulo bus terminals, according to data from SOCICAM, which manages the bus stations in the city of São Paulo - the Tietê, Barra Funda and Jabaquara terminals - ended the year with a movement of 7.6 million passengers in 2020, a variation of -51.59% compared to the number registered in 2019.

São Paulo Airports
Based on data from the National Civil Aviation Agency (ANAC), São Paulo airports registered 38.5 million arrivals of domestic and international passengers in 2019. In 2020 this number was close to 16.5 million arrivals, -51.9 % of that registered in 2019. In addition to Congonhas, Viracopos and Guarulhos airports, the data also includes regional airports that serve regular flights in São Paulo.

Among the shares of passenger origins in the main airports of São Paulo, Rio de Janeiro, Porto Alegre, Belo Horizonte and Brasília represented 29% of the flows of air travelers to the state. In 2020, Belo Horizonte gave way to Recife in the list of the first 4 places in the ranking. Thus, these 4 cities, now with the capital of Pernambuco, represented 29.5% of these origins. For international origins, Buenos Aires, Santiago, Miami and Lisbon remained the main origins of passengers between 2019 and 2020 for São Paulo.
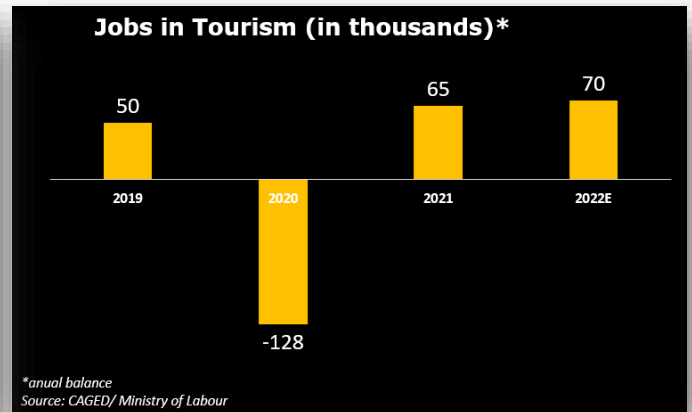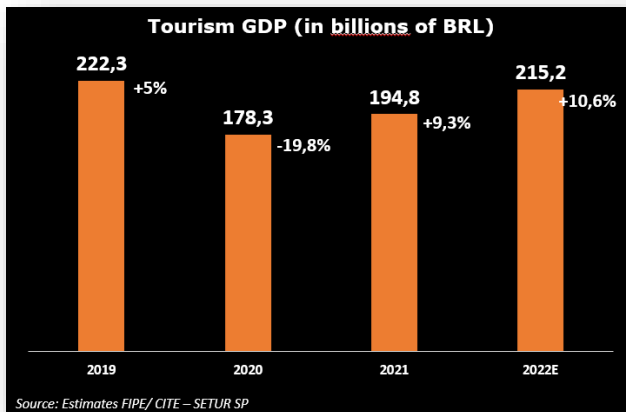
Tourism GDP

According to CITE estimates, mainly due to the pandemic and the reduction of activity above 90% in some segments in months such as April, May, and June, as well as a movement of 35% to 40% below the registered in 2019 for August September and October, the Gross Domestic Product (GDP) of tourism fell -19.8% in the year 2020.

Tourism GDP, in current and adjusted values, was around R$ 183.4 billion in 2020. As tourism was one of the sectors most affected by the pandemic, the sector's share in the state economy dropped from 9.3% reached in 2019 to 7.4%, considering the GDP estimates for the state of São Paulo by SEADE Foundation, which should be -0.1%.

Tourism Companies Revenue

Based on data from the National Confederation of Commerce, Goods, Services and Tourism (CNC), which estimates that the direct revenue of tourism companies in Brazil was approximately R$ 146 billion, or -39.1% year-over-year (R$ 241 billion in 2019), CITE projected the revenue for São Paulo, which ended 2019 at R$ 90.4 billion (or 38% of tourism revenue in Brazil), and stood at R$ 55 billion in 2020, with a fall of -39% in relation to the previous year, with rates similar to those of Brazil.

Tourism GDP (in billions of BRL)

2019: 222,3 +5%
2020: 178,3 -19,8%
2021: 194,8 +9,3%
2022E: 215,2 +10,6%

Source: Estimates FIPE/ CITE – SETUR SP

Jobs in Tourism (in thousands)*

2019: 50
2020: -128
2021: 65
2022E: 70

*anual balance
Source: CAGED/ Ministry of Labour

Volume of Tourism Services

Analysis of data from the Monthly Service Survey of the Brazilian Institute of Geography and Statistics (IBGE) for tourism activities, which involve accommodations, food, passenger transport, travel agencies, culture, leisure and entertainment, point to a 30% drop in tourism activities in Brazil compared to 2019. For the state of São Paulo, the index was around -29%. In 2019, the State of São Paulo grew 5.3% in the same indicator. The growth registered in Brazil for the mentioned period was 2.5%.

Jobs

Data from the General Register of Employed and Unemployed Persons (Novo CAGED/Ministry of Labor), covering the characteristic activities of tourism: accommodations, food, passenger transport, travel agencies, leisure, vehicle rental and event organization, show that the balance in 2020 for the state of São Paulo was -128,000 direct formal jobs. After seven consecutive months of negative monthly balances of jobs for tourism in São Paulo, October recorded a positive balance of 7,800 jobs recovered. The national balance of jobs for tourism ended at -358,000 jobs.

Perspectives for tourism recovery in 2021/2022

The evolution of numbers and estimates for 2021 and 2022 are based on world forecasts of tourism resumption, as well as the total or partial capacity of evolution of tourist flows observed in the period between July and November 2020. The mentioned interval served as a basis for the elaboration of activity reactivation parameters and the time for this situation to occur. In this way, it is estimated that in 2021 the flow of tourists grew 44.9% compared to 2020 and in 2022 it will exceed the flows recorded in the pre-pandemic period by 4.7%. It is important to note that this scenario can be influenced by the prospects of mass vaccination, as well as the control of Covid-19.

Tourism GDP - Data monitored by CITE indicate that a process of activity recovery has been taking place since October/2020, which resulted in a growth of +10.8% in 2021 and another +9.6% in 2022, in part also due to the growth of proximity tourism, within the state of São Paulo. In this way, the tourism economy will possibly recover in July 2022 to the size it had in December 2019, and ends the year already at higher levels than before the pandemic.

As previously mentioned, the sector's share in the state's economy in 2020 dropped from the 9.3% reached in 2019 to 7.4%. However, this share rose again to 8.3% in 2021, considering a recovery in São Paulo's GDP of 4.9% estimated by the SEADE Foundation. In the period between April and December 2021, considering a national vaccination plan already carried out and covering different age groups, we already have a level of resumption that should be maintained during 2022.

Concerning jobs, throughout 2021, the accumulated balance for the year was 60,000 jobs recovered, with estimates for 2022 at more than 70,000 jobs in all areas of tourism.
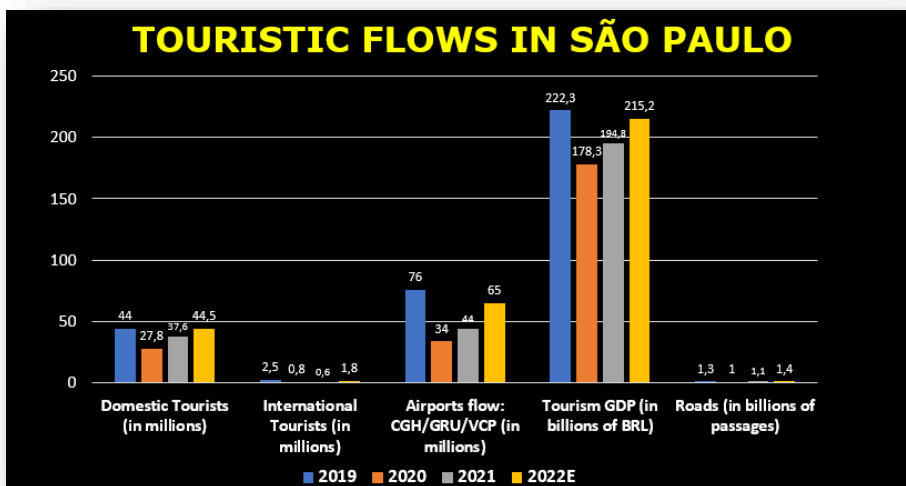
Considerations on Tourism Resumption

The scenario that is shaping up for tourism in São Paulo (especially with the adoption of the vaccine, of security protocols in tourism, the strengthening of proximity tourism within the state itself and a boost given by availability of credit for investments, legislation of Tourist Districts, portfolio of areas to attract investment in tourism, new legislation on resources for tourist municipalities, promotion campaigns, packages and scenic routes) is a total recovery to the levels seen prior to the pandemic in 2022 and real growth with expansion of the offer of services and mainly with the strong resumption of business tourism in 2023.

The sector had closed 2019 with a balance of direct jobs created at +50,000. About 128,000 direct jobs were lost in the pandemic, a number that has continued to recover since the end of 2020, and is currently at a level of about -5,000 job posts.

The result that CITE found for tourism GDP in 2020 is a reduction of -20.9%, considering direct, indirect and induced tourism activities. It is important to consider that indirect activities also involve many permanent hires, which do not have a reduction proportional to the reduction in activity; and induced activities depend mainly on the sector's wage bill and on the activity of the economy as a whole, which, due to compensation and agreements, had a lower reduction than the level of direct activity.

The reduction in tourism is mainly due to the months between April and July, when monitoring rates for activities such as passenger transport and accommodations fell by more than 90% in São Paulo.

Some sectorial indices do not consider tourism market movements that take place independently, such as the thousands of day trippers that circulate throughout the state of São Paulo and whose main travel motivations are leisure and/or visiting friends and relatives. Also worth mentioning is the movement generated by app hosting rental tools, such as Airbnb.

The offer of domestic flights in December and January 2020/2021 was 65% of that practiced in 2019, which was a very positive year-end in terms of movement.

The tourism market in São Paulo has the characteristic of being the main source of national and international tourists from Brazil; there is a retention of resources for tourism by the population of São Paulo, formed by retained savings, national and international trips not taken in the period, in addition to loyalty for starting to visit destinations in the state of São Paulo that were not visited before. In this way, an additional value of R$ 13.4 billion in tourism revenue was estimated by the end of 2021.

Devil's Cave - Eldorado SP - Photo by Ken Chu - Expressão Studio

2. MAIN CONSIDERATIONS AND CHALLENGES FOR SÃO PAULO STATE AS A DESTINATION

Preliminary analyses of the current situation of tourist destinations in São Paulo, especially the in the nine destinations monitored by CITE, carried out by the State Travel and Tourism Secretariat to prepare plans and actions related to the challenges, are presented below. Also, this preliminary study points out the relationship of each point with CITE and how this initiative can help improve the items identified as points of attention.

Limited growth in tourism, for macroeconomic reasons mainly in Brazil and Latin America, and the lack of a qualitative leap, just a process of gradual improvement.

CITE constantly monitors macroeconomic indicators related to tourism in São Paulo, using its own tools, national (Ministry of Tourism) and international sources (UNWTO Tourism Dashboards) to analyse performance indicators.

Airport-city transport infrastructure; integration between airport, subway and other modes of transport; relatively little promotion of destinations relatively close to the São Paulo hub; few receptive and information professionals who speak English.

The studies of tourist movements in the air transport modes, in the main airports of São Paulo, related to research of tourist demand that indicates the means of transport of the tourists in the monitored cities, as well as the habits of obtaining information of the destinations by the tourists are CITE's contribution to monitoring this point.

The COVID-19 crisis brought a deceleration and decapitalization that needs to be quickly reversed in the next 24 months for the tourist regions to continue their strengthening process as tourist destinations and to provide qualitative leaps.

The data obtained by CITE on a monthly basis offer a wealth of insights related to the recovery of the tourism sector throughout the pandemic. CITE played an important role over the years 2020, 2021 and 2022 in obtaining, processing and disseminating indicators necessary for monitoring the sustainability of tourism in São Paulo.

CITE developed a dashboard to monitor investments in tourist municipalities in São Paulo that is used by the São Paulo State Travel and Tourism Secretariat to monitor the progress of works, transfer of resources, number of cities served and other relevant information. Furthermore, this information is cross-referenced with the movement of tourists and the estimate of annual visitors to the cities, in order to determine the sustainability of the works and their impacts on the volume of tourists in the destination.

Investments of more than R$ 200,000 per year spread over 70 tourist resorts and 140 tourist municipalities.

Improvement of the business environment, by providing Tourist Districts, specific territorial areas in the State with conditions to receive tourist investments in more competitive and better organized conditions, in areas of special natural and scenic, historical-cultural interest, and the existence of leisure and thematic parks, or seafront; the enhancement of scenic routes, by enabling routes of roads with greater scenic attractiveness and structure for proximity tourism; greater focus on local/regional tourism, since São Paulo is the largest tourism emitter market in Latin America, for the whole world.

And for this objective to be achieved, CITE makes available to all monitored destinations, through dashboards, reports and open data, a series of economic and sustainability indicators of the activity, as well as tourist profile surveys, for better understanding of the impacts and volume of local tourism activity.

The economy of tourism in the state of São Paulo, especially the concentration with one of the largest air hubs in the Southern Hemisphere and a major tourist emissive, brought a GDP of US$ 41.3 billion, with an annual growth of 5%, with tourism in Brazil it grew only 2.5% in 2019, and the country's economy, 1%.

This economic leap in tourism, although limited by the macro and business environment conditions, was also visible thanks to the work of CITE, by integrating sources, information channels, researchers and trade.

Also, economic support with credit and other measures in order to avoid a rapid decapitalization and dismantling of the structure of the tourism trade, especially hotels, restaurants and other activities due to the crisis with Covid-19, in addition to a macroeconomic recession in Brazil that has been around since 2015; Support in the configuration of a stronger domestic tourism market in the state in 2020 and 2021.

All monitoring of the granting of credit to companies that suffered significant drops in revenue during the pandemic was carried out by CITE and became a permanent activity of the São Paulo State Travel and Tourism Secretariat, relating the amount of investments and financial volume lent to companies with variations in the opening and closing of tourism companies and even tourist flows in monitored tourist destinations.

Permanent promotion program, better integrating the leading tourism trade companies and other companies with products associated with tourism (consumer goods, fashion, vehicles), closing the set: international promotion and national and regional promotion.

All actions to promote tourism in the state of São Paulo are related to the evolution of numbers monitored by CITE, in particular the estimates of national and international tourist flow in monitored tourist destinations.

The state seeks to offer attractions at three levels: international, national (with the largest global metropolis of Brazil), and regional within the state itself, which is the one that issues the most tourists from Latin America to the world.

Tourist demand surveys, both carried out by CITE and those oriented towards tourist destinations, are a regular source of information on this topic, both for monitoring and for directing specific actions.

3. DATA SOURCES RELEVANT TO THE WORK OF CITE

There is a range of data sources that CITE uses to collect data for its work. Here we will present the main ones. For more detailed content on each type, please refer to ANNEX III.

3.1. TRADITIONAL SURVEYS

Surveys at CITE are conducted within the state of São Paulo. The target participants are public administration, specialized market and the population. Since the pandemic, the biggest part of surveys is conducted online, but recently some of them were conducted on site at major cultural events and trade fairs. CITE also has an agreement with the State Secretariat of Governance to carry out a yearly telephone poll in order to assess travel intentions of the population. Results are published in interactive dashboards or reports on the CITE website.
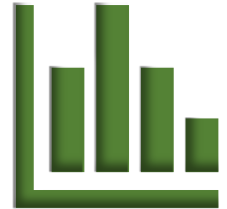
3.2. SEASONAL SURVEYS (sponsored by private companies)

CITE uses seasonal surveys carried out by tourism associations and companies of the tourism sector on demand, since they don't always have a fixed periodicity. The main sources are the surveys from the Brazilian Association of the Hotel Industry – São Paulo Chapter (ABIH-SP), the Brazilian Association of Bars and Restaurants (ABRASEL), the Brazilian Ministry of Tourism (MTur) and the Brazilian Association of Airline Companies (ABEAR). Data collected from these surveys are published in report or infographic format in CITE's monthly newsletter.

3.3. DATA MINING

Data mining is used by CITE for a broad range of indicators that include air transport, flow of formal jobs in tourism, constitutions and write-offs of companies, monitoring the behavior of the services sector, arrivals and departures at bus terminals, vehicle flow, reputation of tourist attractions, flow of regular bus charters and general tourism recovery. As one of the most important sources of data for CITE, we will address this topic in more detail later.

3.4. TRENDS

Trend tracking is performed by CITE through tools such as Kayak Travel Metasearch which provides an interactive dashboard containing analyses of more than one billion flight searches to measure traveler interest in certain destinations. Considering that Kayak is a tool for travel searches, it is occasionally used by CITE for evaluation of traveler interest in destinations in the state of São Paulo. Furthermore, this information is crossed with the travel purchase advance, resulting in competitive intel reports to the monitored destinations.

CITE also follow the trends information of World Travel and Tourism Council (WTTC), which provides reports and insights on tourism that make it possible to quantify the direct and total impact of travel and tourism on local economies, supporting CITE's work in calculating tourism GDP for the region.

4. TOURISM OBSERVATORIES

Several countries, Brazilian states and municipalities have tourism observatories to monitor indicators, generate information, and subsidize the preparation of strategic plans for the sector. These instruments are considered essential for tourism activity.

The idea of tourism observatories as a very important tool to support market intelligence actions is already a reality in several spheres:

World
INSTO – International Network of Tourism Observatories by the World Tourism Organization (UNWTO); "Harmonization of Tourism Statistics Systems in the Southern Cone Countries", with the participation of Argentina, Brazil, Chile, Paraguay and Uruguay.

Brazil
Brazilian observatories were created within the scope of the National Program of Tourism Development (PRODETUR) with the project "National Strategic Plan for Tourism Statistics". It is also important to mention the National Tourism Plan 2018–2022, by the Brazilian Ministry of Tourism - Item 4.1.4 - initiative: Expand and improve studies and research in tourism, established the strengthening of the Brazilian Network of Tourism Observatories as an important strategy.

States and Municipalities
Several tourist destinations already have their "Tourism Information and Statistics System – SITUR" in place and in operation. In São Paulo, concerning the nine monitored municipalities, the cities of Olímpia, Brotas, Campinas, Ilhabela and Santos are already implementing their observatories, with CITE support in team training and knowledge sharing.

> A list and description of main activities of the most active tourism observatories, in Brazil and around the world, that served as a basis for the construction of the CITE working parameters can be found in ANNEX IV

CITE and OTE
The OTE (Observatory of Tourism and Events of the City of São Paulo), working at the local level, under São Paulo Turismo/São Paulo City Tourism Secretariat, is an undoubtedly important resource of data and research. The work that has been presented through the years is a great reference as the state capital is one of the most important destinations in Brazil.

The São Paulo State Tourism Secretariat, representing 210 tourist destinations in the state of São Paulo, including the city of São Paulo and other beach and countryside destinations, holds in its structure the CITE, working at a regional level in the nine municipalities listed.

In this case, there is absolutely no conflict in roles such as monitoring the tourism sector. Thus, many of the stakeholders that provide data to OTE will also be able to provide information to CITE, with absolutely no conflict of interests, since all data used and provided is public and are under agreements - as are the letters of support provided in the application.

In fact, there is a signed cooperation agreement between OTE and CITE, with each of the projects supporting each other with databases, methodologies and insights, working together for a better comprehension and sustainability of the sector in the state and all destinations involved.

Brazilian Network of Tourism Observatories (RBOT)

The Brazilian Network of Tourism Observatories (RBOT) brings together approximately 50 tourism observatories throughout the national territory, whether state, municipal, linked to universities or private initiative, with the aim of promoting tourism based on data for decision-making.

In a short time, CITE has turned into a national reference in the generation of tourism intelligence, and in 2019, after 2 months of operations, became a member of RBOT and started participating in a series of activities within the organization, including lectures, methodology discussions, research reviews, and leading a workgroup related to network communication.

RBOT was created in 2016, with the objective of uniting observatories to encourage work and production involving statistical data, market intelligence studies and research aimed at different tourism segments.

Over the years, the network has strengthened, held meetings to exchange experiences and even a large survey together with more than 20,000 valid questionnaires applied to tourism companies throughout Brazil, focusing on the impacts of the Covid-19 pandemic in the tourism business.

It is important to emphasize that RBOT already has members in all units of the federation, whether at state or municipal levels. However, it is still a non-formalized network and not linked to any type of higher formal organization. Thus, in 2021, the RBOT organized itself into working groups to define actions aimed at the following topics:

- RBOT formalization
- Basic methodologies for all members
- Strategic planning
- Institutional relationships and partnerships
- Communication
- Academic journal and periodical publications

RBOT already has a YouTube channel where it publishes all events, lectures and monitoring of network activities: https://www.youtube.com/channel/UCaqQkYZOno5T8ZXlkLGQU-w/videos

There is also an Instagram page for communicating network events, sharing members' work and best practices involving research: https://www.instagram.com/rbot.net/

Also, there is a WhatsApp group with 100 representatives from organizations throughout Brazil.


Touristic Tram - Santos SP - Photo by Ken Chu - Expressão Studio

Currently, there are numerous tourism observatories in the world, with different projects and objects of study. The exponential growth that the world tourism industry has experienced for decades promotes the development of knowledge structures of destinations, aiming to meet the existing challenges in terms of consumption of resources, control of the carrying capacity of the places, preservation of the environment and natural and cultural heritage, or measurement of economic and social impacts that can be positive or negative.

The current situation is that under the term "Tourism Observatory" there are several structures that consider the following aspects:

- Geographic coverage: there are tourism observatories with urban or municipal, regional, supra-regional or thematic coverage with a focus on monitoring specific products (meetings and congresses, ethnotourism, health tourism, among others).
- History: there are recently created observatories and others with decades of operation.
- Ownership: can be public, private or public-private management.
- Research area: not all observatories serve the same research areas; there are observatories focused on monitoring demand, supply, markets, on socioeconomic variables, or with their own indicators.
- There are also observatories that do not carry out research and only present a repository of documents and studies carried out by destinations over time.
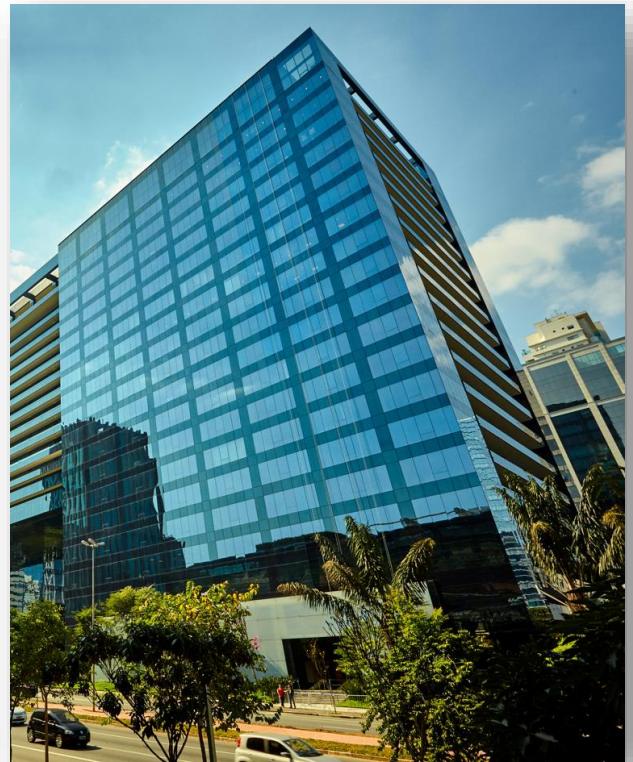
Berrini Avenue - São Paulo SP - Photo by Ken Chu - Expressão Studio

In Brazil, several municipalities and states have the understanding that tourism observatories offer technical and information subsidies for decision-making processes and represent the basis for the elaboration of strategies and public policies aimed at the travel segment. The local and regional development of tourism, according to the destinations themselves, depends on information generated by structures such as those represented by an observatory. This process, linked to tourism activity and the events that take place in the localities, has several stages that cannot be satisfactorily developed without the technical basis and quantitative information from specific studies and research. These instruments are fundamental pieces of tourism planning, becoming indispensable for the development of a tourism activity in a sustainable and planned way.

For all types of entities, whether public or private, the knowledge generated by an observatory denotes a means of monitoring the effectiveness of public policies and services, development of destinations, sociodemographic profile and habits of tourists, economic and social performance of the activity, among others. For the population in general, activities are important for the social control of tourism management, of enterprises linked to the sector and in the perception of how much wealth and local development tourism generates.

In the case of a product with peculiar characteristics, as the sectors of tourism and events, involving multiple activities and interacting with different sectors, it is vital to know indicators and research that lead us to the real improvement of the scenario involved.

São Luiz do Paraitinga SP - Photo by Ken Chu - Expressão Studio

In this context, our surveys must be carried out aiming at the real knowledge of the control variables related to the social profile and consumption habits, and the assessment of the support infrastructure through mentions of the proposed themes, from the perspective of its visitors, national and foreign.

The performance data obtained will enable a systematic scenario of some of the most significant factors in the sector, such as: social and economic impacts, cities/territories and structures, technologies, policies and standards, sustainability and habits.

5. THE WORK OF CITE

From the analysis of the current situation of CITE on a global level and of selected projects in particular, we can obtain several key elements that must be considered in the development and implementation of a Sustainable Tourism Observatory for the state of São Paulo:

In relation to the statistical measurement of tourism: developing the system based on the methodological framework established by the World Tourism Organization, which will allow the quality and rigor of the results, in addition to obtaining a reliable degree of comparability with other destinations, to establish the competitive position of the state of São Paulo.

Involve local, public and private agents in the development and maintenance of the observatory. In this sense, it is essential to identify and transmit the benefits to each of these agents of participating, both in terms of money and knowledge, as well as to communicate the results in an appropriate way (in a very visual way, strongly focused on the needs of users, through proper channels and with proper periodicity).

Involve residents in the project, so that they realize the social and economic benefits of tourism, as well as the will of the authorities to develop a sustainable sector that takes into account their perception and measures the evolution to establish corrective measures, when appropriate.

Develop a system of indicators that is sustainable over time and focused on measuring tourism that helps in its management towards the sustainability of activity in the territory.

Identify reliable and relevant sources for the system, traditional (records, research studies, etc.) and innovative (social networks, big data, new technologies, etc.).

CIET
CENTRO DE INTELIGÊNCIA
DA ECONOMIA DO TURISMO

5.1. CITE'S MISSION, VISION AND MAIN OBJECTIVE

CITE was created in 2019 to establish an unprecedented and fundamental structure for the São Paulo State Travel and Tourism Secretariat, with the main objective of offering rich information and support to touristic municipalities, as well as tourism enterprises and educational institutions. Our goal is to provide data and studies which will help with decision-making and sustainability actions for regional tourism.

5.2. CITE'S STANDARDS

To help guide the projects of tourist destinations in São Paulo, the market and public authorities in the short, medium and long term, through the generation of intelligence and elaboration of strategic plans.

## 5.3. OBTAINING DATA FOR THE CONSTRUCTION OF CITE'S INDICATORS

5.3.1. TRADITIONAL SURVEYS

✓ Quarterly survey among municipalities and specialized market through an online questionnaire that assesses the performance of tourism in their regions or enterprises in the previous three-month period and expectations for the following three months, in relation to what is normally expected for this time of year, both for domestic tourism and for international tourism. This survey has the UNWTO World Tourism Barometer as a model. For further information on UNWTO's Barometer, please refer to ANNEX V.

✓ Monthly online survey carried out with accommodation facilities and travel agencies in the nine cities monitored to collect data on average occupancy, average daily rate, average ticket prices, quantity of products sold, group sizes and purchase advance, among others.

✓ Annual online survey among the inhabitants of the state of São Paulo about their perception of tourism in their cities and regions and what their expectations are for tourism growth in the coming years.

✓ On-demand surveys with municipalities to collect information about expectations on holidays and festivities, as well as post-event results.

✓ On-demand surveys of specialized market profiles.

✓ In-person surveys at major events and trade fairs in the state of São Paulo.

Some of the reports are for internal use only and the others can be found at CITE's webpage on www.turismo.sp.gov.br/ciet
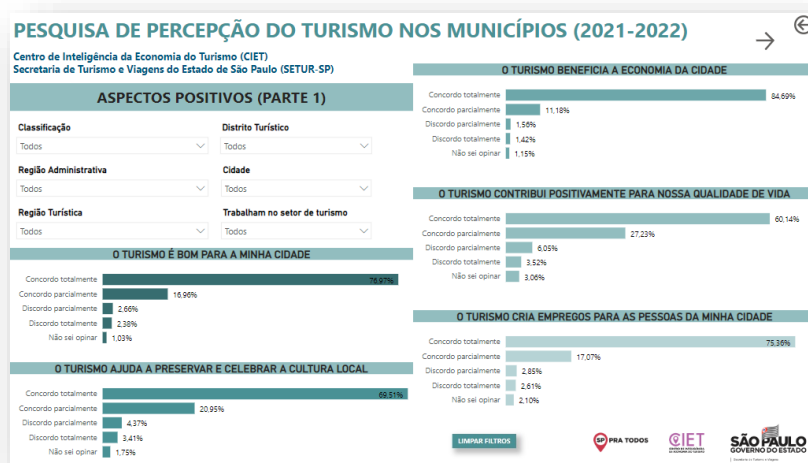

Perception Survey, 2nd edition, 2021-2022
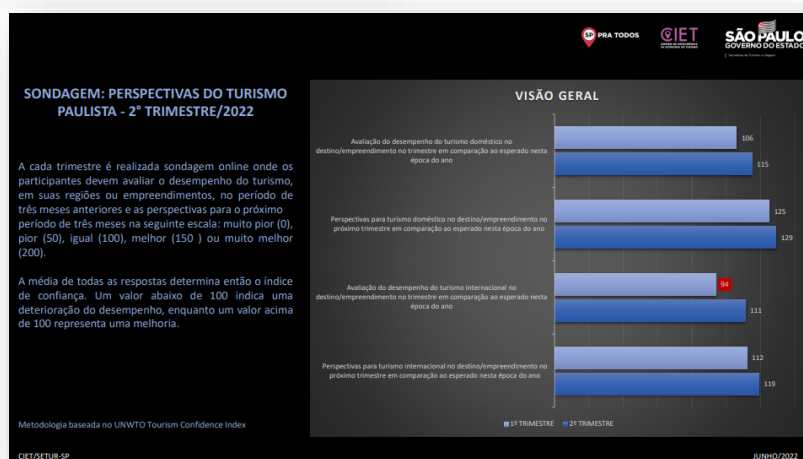
Perspectives for Tourism in São Paulo, 2nd quarter/2022

5.3.2. DATA MINING

✓ **Air Transport Market Indicators**. Source: National Civil Aviation Agency (ANAC). Content: monthly movement of passengers and aircrafts at the three largest airports in the state (GRU, VCP, CGH) and at six regional airports serving the monitored regions.

✓ **Flow of Formal Jobs in Tourism**. Source: Ministry of Labor (Novo CAGED/MT). Content: monthly employment data in the tourism sector. Admissions, dismissals and balance of jobs.

✓ **Constitutions and Write-offs of Companies**. Source: Board of Trade of the State of São Paulo (JUCESP). Content: monthly data on the opening and closing of companies in the tourism production chain.

✓ **Monthly Service Survey**. Source: Brazilian Institute of Geography and Statistics (IBGE). Content: monthly indicators that allow monitoring the conjunctural behavior of the services sector, investigating the gross revenue from services in formally constituted companies.
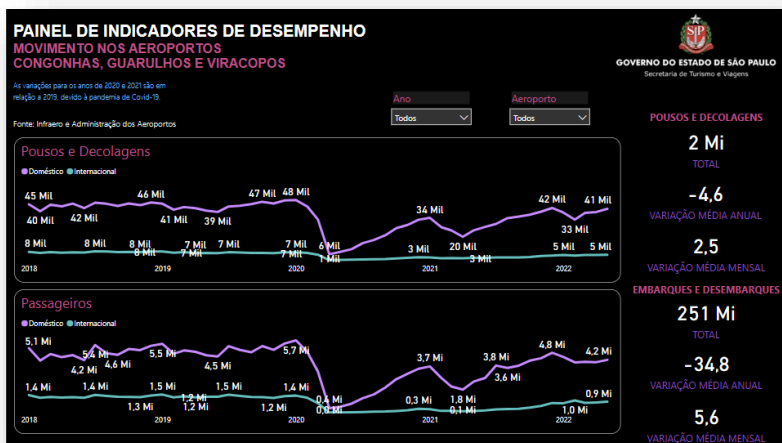
Performance Indicators Dashboard
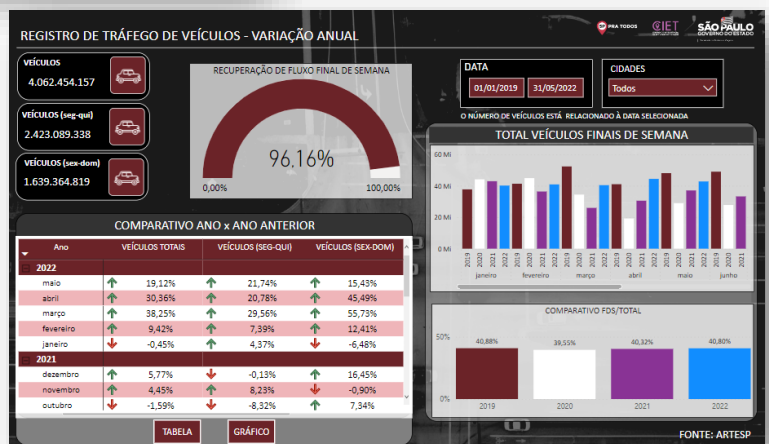
Vehicle Flow Dashboard

✓ **Bus Terminals**. Source: SOCICAM. Content: monthly monitoring of arrivals and departures at bus terminals in the Capital (Barra Funda, Jabaquara, Tietê) and Campinas.

✓ **Vehicle Flow.** Source: São Paulo State Transport Agency (ARTESP). Content: monthly monitoring of 65 Automatic Traffic Sensors (SATs) close to the monitored destinations.

✓ **Tourist Attractions.** Source: ReviewPro. Content: monthly online monitoring of the reputation of attractions in the nine cities monitored.

✓ **Regular Bus Charters.** Source: National Land Transportation Agency (ANTT). Content: Monthly monitoring of the flow of regular bus charters to the cities of Aparecida, Campinas, Campos do Jordão, Olímpia, Ribeirão Preto, Santos and São Paulo.

5.4. HOW CITE WORKS IN THE ELEVEN INSTO KEY ISSUE AREAS

Listed below by topic (all of which will be addressed in more detail within this preliminary study) are CITE's actions in each of the eleven INSTO key issue areas:

Destination economic benefits
Economic indicators help to monitor the positive and negative impacts of tourism in the destination, including the so-called Invisible Burden. They must inform decision-making on investments in infrastructure and services and assess opportunity costs. Indicators on tourist spending also help to identify the most important segments for the destination and help define marketing strategies.

What we do:
Performance in the development of indicators related to the gross domestic product of tourism in São Paulo; monitoring of revenue indicators of tourism companies headquartered in the state; data analysis of public investments in tourist destinations; carrying out studies of the economic impact of large-scale events.

Employment
In some destinations the job market is quite competitive, and the tourism sector may be at a disadvantage compared to other sectors for skilled labor. In others, tourism may be a good sector compared to other jobs. The average value of wages, in relation to other sectors, is very important, as well as the minimum conditions to live according to the local costs of living. It is also useful to differentiate between temporary and permanent jobs, especially in destinations with high seasonality.

What we do:
Measurement of the monthly volume of formal employment in activities characteristic of tourism; estimates of the volume of informal jobs in activities characteristic of tourism. Employment data also serve as a source for seasonality analyses.

Tourism seasonality
The monthly distribution of tourist arrivals throughout the year helps to identify peak, high and low seasons, easily visualized in graphs. Peak periods (peak days) show the pressure at the destination; ratio between peak and average periods help to support the decision on sizing infrastructure and services. These indicators show the pressure on the means of accommodation during the high season and the potential economic problems in the low season, in addition to measuring the progress of strategies to mitigate seasonality.

What we do:
Analysis of data related to hotel occupancy rate in monitored destinations, as well as data on offer and volume of check-ins from seasonal rental platforms; volume of vehicles on the access roads to monitored destinations; passenger volume at large airports in the state of São Paulo.

The following six items are inserted in a pilot project developed by CITE in partnership with the Interamerican Development Bank (IDB), focusing on the cities on the North Coast of São Paulo, where the city of Ilhabela is located.

The project aims to monitor 56 main indicators and, among them, the ones related to the eleven INSTO key issue areas that are listed below. It is scheduled to be put into action by the end of August 2022, with results expected on the second half of 2023.

More details on the pilot project from IDB / SETUR-SP can be found in ANNEX II.

Energy management

The indicators point to trends in energy consumption, including the relationship with tourist seasonality, and can serve as a comparison between the various sectors of production. The breakdown by type of energy source also serves to promote the reduction of energy consumption per capita, especially from non-renewable sources and fossil fuels, as well as to encourage the use of sustainable sources.

What we do:
Monitoring of annual consumption of electric energy, consumption of petroleum derivatives and ethanol, energy conservation.

Waste water (sewage) management

The monitoring of sanitary sewage is directly related to water management, mentioned above. The data should inform the decision on public health issues for residents and the quality of the visitor experience.

What we do:
Monitoring of the percentage of sewage collection; percentage of sewage treatment.

Climate action

Measuring destination progress with respect to vulnerability management and climate change adaptation. The analysis should take into account the destination's contribution to the emission of greenhouse gases (GhG), as well as its exposure to risk, adaptation to climate change and preparation of emergency and contingency plans for extreme events.

What we do:
Monitoring of vehicle fleet; air quality index; flood hazard; slip hazard; annual energy consumption and CO2 emissions.

Water management

Monitoring the quality and availability of water serves to measure the supply and demand of water, especially in places with high seasonality. Water availability is also directly related to conservation strategies and water consumption reduction. Indices that monitor water quality are used to identify impacts from other sectors, such as sanitary sewage, human occupation, influence of continental fresh water, solid waste carried by rain, among others. In coastal destinations, water quality indices are still related to recreational activities.

What we do:
Monitoring of the water service index; coastal water quality index; beach bathing; monthly water consumption.

Solid waste management

Monitoring allows for the identification of trends in waste production and comparison with seasonality. The amount of waste collected can be used to calculate the number of visitors. The data can also be used to support decision-making on reducing waste generation, especially packaging and disposable plastics, as well as encouraging recycling.

What we do:
Monitoring of solid waste collection; waste landfill quality index; solid waste management index.

Accessibility

The indicators must be used to assess the destination's performance in terms of accessibility and compliance with current legislation (Law No. 13,146/2015).

What we do:
Monitoring of application of accessibility standards in public facilities; data on proportion of accessible visitation equipment.

Location Satisfaction

The satisfaction or dissatisfaction of the local community with tourism is an initial indication of potential conflicts between residents and visitors and can help to identify emerging problems before they worsen and compromise local living conditions and the competitiveness of the destination. Local satisfaction can subsidize an eventual control of the number of tourists.

CITE already coordinates a tourism perception survey, carried out by the municipalities, which measures several positive and negative impacts. While the selected indicators show a general picture of the perception of tourism in the municipalities, specific indicators can contribute to a better understanding of the other criteria of the system.

Governance

Participatory planning processes that follow the principles of good governance can reduce conflicts between actors and create partnerships that contribute to the development of positive cooperation and competition processes in the destination. The measurement of the effective participation of the actors helps the processes of incentive and promotion of participation, as well as the identification of groups excluded from the process.

The evaluation of indicators also allows the elaboration of composite indexes. The General Sustainability Index is the simple product of the two indices presented above, combining the analysis of the final impacts on the 14 sustainability criteria with the municipality's management capacity. The analysis, methodologies and detailed table of indicators are made available to the monitored municipalities for local implementation of the surveys and will serve as a basis for future indicators in other tourist regions monitored by CITE in São Paulo.

5.5. EXISTING AVAILABLE TOURISM RELATED DATA THAT ENABLES STAKEHOLDERS TO EVALUATE THE SECTOR'S PERFORMANCE

5.5.1. INDICATORS AND DATA PROGRESS AVAILABLE

An indicator is the statistical measure of a given aspect of reality, as it expresses the properties of a current phenomenon or situation that you want to know. The indicator is, therefore, a reference of what will be measured under the consideration of various scales or dimensions and, by definition, comes from the relationship of two or more significant pieces of data that contribute to the monitoring or evaluation of an indicated situation or phenomenon.

Thus, a system of indicators is a grouping of related indicators that seeks to show evolution, highlight trends and point out problems about a given situation or phenomenon.

The Catalog of Indicators for CITE establishes the indicators that were selected for the assessment and monitoring of tourism activity in the state.

Sources are selected after a thorough analysis of the current statistics existing in the state and other agencies with statistical information in Brazil, incorporating those that met the requirements of rigor, reliability, availability and relevance.

When analyzing the existing information sources, the following analysis criteria were considered:

Conceptual framework
- Indicators
- Analysis units
- Breakdown level
- Level of transversality
- Reference period
- Disclosure of information (formats, periodicity, media)
- Database characteristics
- Legal structure (check if the production is supported by resolutions, decrees, regulations, ordinances or laws).
- Use of international classifications and degree of comparability with data from countries of international reference institutions
- Level of satisfaction with the results, based on the needs of the sector or institutions and possible areas for improvement
- Sector information demands
- Incorporation of new indicators, some from third parties (social networks, private companies or others) and others (sustainability indicators, load capacity indicators) that are aligned with the idiosyncrasy of the tourism sector in the state and with its development objectives

The Indicators Catalog is organized around different themes of the tourism reality, each with different Analysis Areas, which in turn group Variables and Indicators. The topics are as follows:

Demand:
It groups the indicators related to tourist demand: analysis of tourist flows of travelers arriving by air and land; characteristics of the visitor's profile; registered flow of tourism products and visitable resources; demand analysis recorded around the activity of tour operators and analysis of demand flows served at tourist information points located in different parts of the state.

Supply:
It groups the activity indicators of tourist accommodations, companies and tourist establishments, as well as the so-called resources and tourist products of the state (natural parks, berths, among others).

Tourist products:
It groups indicators aimed at monitoring tourism target products in the state: birdwatching, sport fishing, adventure and nature tourism, MICE tourism.

Destination management:
In this area, different indicators deal with the tourist management of a destination: aspects such as the tourist load capacity of a city, the reputation and sustainability of the destination, aiming at the greater competitiveness of the sector.

Economy:
This section brings together variables and indicators related to the contribution of tourism to the state's economy: employment, tax collection and hotel occupancy.

For detailed information on the indicators used by CITE, please refer to ANNEX I

5.6. CITE'S ORGANIGRAM
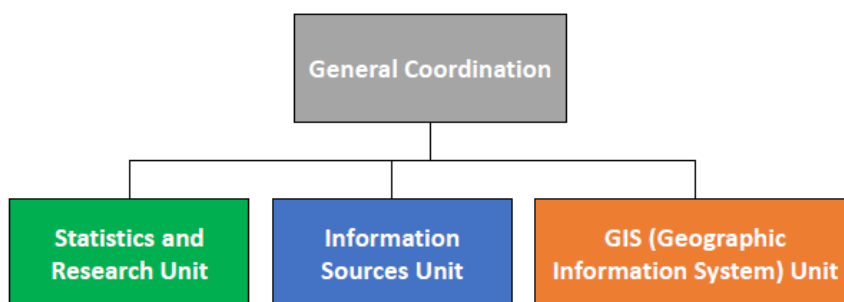
5.7. STRUCTURE, RECOMMENDATIONS, SUGGESTIONS AND COMMENTS

According to the implementation standards of CITE, it is responsible for:

- Compiling databases and storing information
- Performing statistical operations (tabulation, data debugging, among others)
- Performing the statistical calculations established in the catalog of indicators
- Calculating the indicators established in the catalog of indicators
- Interpreting information correctly to extract conclusions and data of interest to public and private recipients
- Coordinating the specific investigations to be carried out
- Coordinating the necessary field work (research) according to the catalog of indicators
- Coordinating the specific investigations to be carried out, which implies: sample design, fieldwork design, sample error, research design, among other activities

CITE also works with the Travel and Tourism Secretariat Communication Unit, which is responsible for the management and production of communication actions related to the Observatory, taking into account:

- Management of interinstitutional agreements
- Observatory bulletin layout
- Dispatch of the newsletter to members of the distribution list
- Monitoring of shipments of data and information required in time and form by the Observatory
- Response to the demands for information addressed to the Observatory
- Write press releases and send to the media
- Content management of the Observatory's website
- Management of the content of the Observatory's Instagram

Together with the Statistics and Research Unit, the Communication Unit has the highest content, in terms of workload.

## 5.8. PARTICIPATORY APPROACHES WITH LOCAL TOURISM ACTORS

In a short time of activity, CITE has already demonstrated its importance in the structure of the Secretariat of Tourism, offering data, research and insights for a better understanding of tourism and the sector's sustainability in the nine key destinations of the state.

Furthermore, CITE is already sought by the destinations in the state of São Paulo for the dissemination of knowledge, through a training program for local agents to collect data and supply the central platform of the Secretariat of Tourism.

CITE's future objectives, besides the admission to INSTO, is to participate more diligently in the development of new techniques and methodologies for a better understanding of tourism as a sustainable activity that generates jobs and income.

In addition, CITE establishes a permanent network with various actors responsible for monitoring and collecting data necessary for the development of actions, as well as those interested in the extensive production of reports and indicators already available.

Below, it is possible to visualize this structure with all the actors involved in the project:
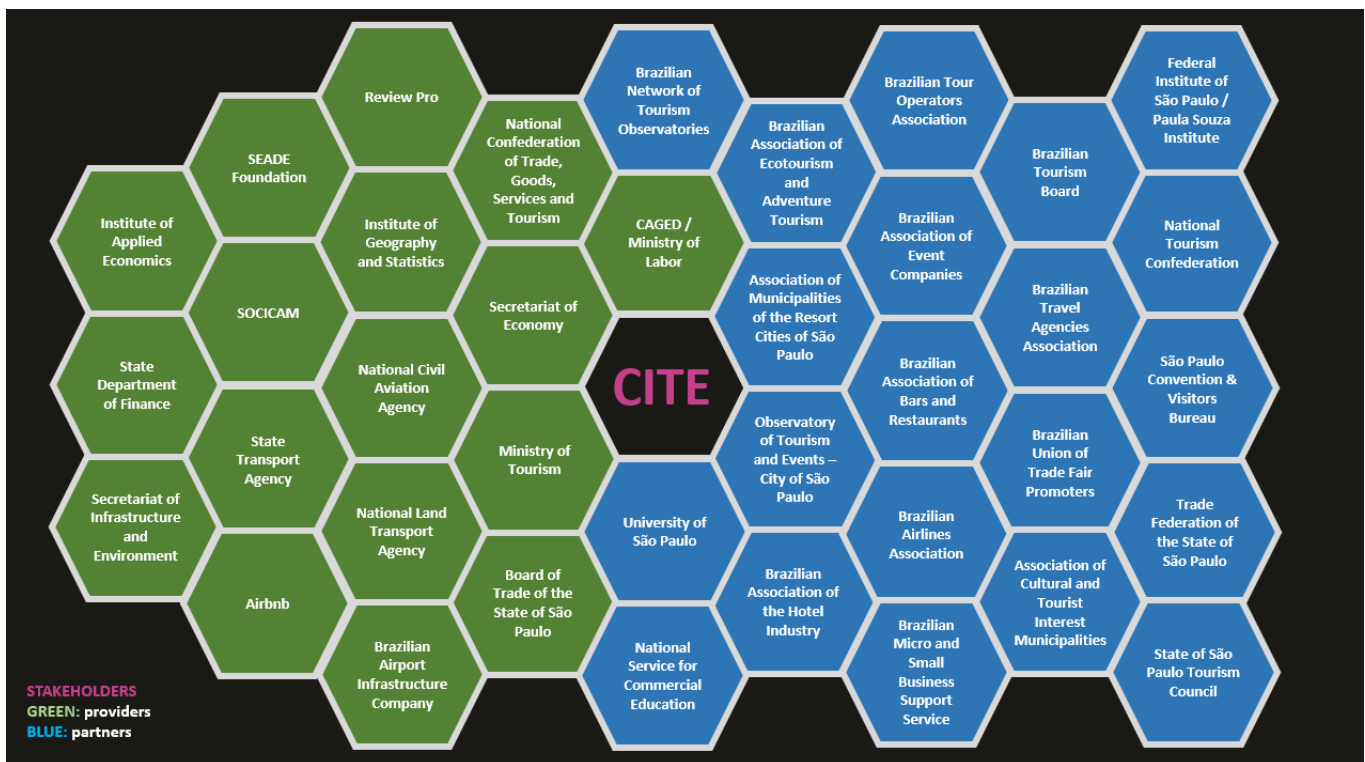
In addition to the discussions and data presentations normally carried out at the monthly meetings of the State of São Paulo Tourism Council (CONTURESP – acronym in Portuguese), where most of the stakeholders involved in the CITE project have some formal participation, research, indicators and data collection that can be incorporated into the work of the initiative, there is great synergy with the communication department of the Travel and Tourism Secretariat, for frequent dissemination of data, performance, tourist movements, among others.

This movement with the press brings evidence to CITE and transforms the project into a reference also for communication actions. It is possible to quantify this action with more than 1,200 articles in newspapers, magazines, TV, radio and websites specializing in tourism in Brazil since 2019.

Also, each of the nine cities monitored primarily by CITE periodically use the data and research produced to monitor the performance of regional tourism activities, evaluate implemented government programs, provide subsidies for the construction of municipal tourism plans and also to defend tourism activity in the regions' local legislative chambers. With this, CITE expands one of its main purposes, which is to build a data distribution network in research among all those involved with the project.

It is always important to point out that CITE was created, as its name suggests, for monitoring tourism economic data. However, over the years, the initiative has also expanded its field of action to indicators of sustainability of the activity, which together with data on GDP, revenue and average spending of tourists begins to compose more complex tourist movement indices, ensuring an evolution methodology in the actions and adapting them to the eleven INSTO key issue areas. An example of this change is the pilot projects with sustainability indicators on the northern coast of the state, already detailed in this preliminary study. Each of the items is exemplified in the tables of indicators in ANNEX I and details which eleven INSTO key issue areas they relate to.

5.8.1 THE ROLE OF LOCAL ACTORS IN THE WORK OF CITE

The importance of local actors in the work of CITE is critical to the success of this initiative at its origins. CITE was created with the aim of acting as a market intelligence network throughout the state of São Paulo.

In this way, the role of local teams from municipalities is practically the backbone of CITE activities. Therefore, the support of the Travel and Tourism Secretariat in the development of local teams to work with indicators is the most important activity performed by the initiative.

To demonstrate the importance given by CITE to local actors, the online training courses on working with data and indicators had around 500 participants in 200 municipalities throughout 2021.

Virtual Training Course on Working with Data – 1st semester 2021

Since the creation of CITE in 2019, one of the main goals of the construction of this project was to join INSTO as a permanent member. Thus, in the act of creating the project and in all conversations, terms of cooperation, agreements and studies carried out with all the actors related to the initiative, this objective is mentioned.

In this way, at every possible opportunity, the INSTO theme is mentioned, both for the membership itself, but also for the opportunity to exchange experiences with other observatories around the world, as well as the evolution in the implementation of sustainability indicators from the eleven INSTO key issue areas for inclusion in the network.

One of the examples of the mentioned opportunities took place in 2020 at the annual meeting of the Brazilian Network of Tourism Observatories (RBOT). The event, held virtually, had the INSTO as its topic of discussion, where CITE presented reflections on the importance of greater participation of Brazilian observatories in a global context. It should be noted that Fabio Montanheiro, coordinator of CITE, is a former manager of OTE, the only Brazilian observatory to date to be part of INSTO.

Virtual presentation at the 4th Annual Meeting of RBOT

CITE, by definition, is already a market intelligence network for tourism in the state of São Paulo. In three years, it was possible to establish this network with actors related to the project. As a result of this primary objective achieved, there are already numerous group activities led by CITE with the objective of expanding the indicators and disseminating information obtained from this monitoring.

These activities already include several of the eleven INSTO key issue areas and a discussion of the international network itself, with the aim of expanding studies on tourism sustainability throughout the state, especially in the nine priority destinations monitored by CITE.

A practical example of this initiative are the meetings of the State Tourism Council (CONTURESP), where monthly CITE presents sector performance data to class entities participating in this organization, so that they can work with future perspectives in their specific activities, such as accommodations, food, transport, leisure, business events, among others.

6. STRATEGIC PLAN FOR THE DEVELOPMENT OF TOURISM IN THE STATE OF SÃO PAULO

The work developed by CITE for the São Paulo State Travel and Tourism Secretariat is based on the guidelines of the state's official tourism plan, named SP 20-30 TOURISM PLAN, which was formally launched in December 2020.

The SP 20-30 TOURISM PLAN is a collective elaboration led by the São Paulo State Travel and Tourism Secretariat (SETUR-SP) with actors from the state's tourism ecosystem and the participation of national and international agents. Its main objective is to establish guidelines, objectives, goals and control mechanisms that are capable of transforming the state of São Paulo into a new national and international reference for tourism.

The SP 20-30 TOURISM PLAN is based on a new concept of tourism activities and products, based on innovation, entrepreneurship, sustainability, inclusion and accessibility, and plurality and diversity as promoters of leisure, business and sports, nature, health, faith, architecture, gastronomy and education.

The Plan combines the main vocations of the state, which, articulated with the market, establish political, economic and institutional conditions for São Paulo to be the protagonist of the tourism of the future.

For details on the SP 20-30 TOURISM PLAN, please refer to ANNEX VI of this document.

> **In the SP 20-30 Tourism Plan, CITE is responsible for disseminating and integrating intelligence networks and generating regional centers to promote and support teaching, research and innovation for a better understanding of the real situation of tourism in the state.**

Buracão Farm and Lodge - Mococa SP - Photo by Ken Chu - Expressão Studio

Date of this edition:
August 2022

Document available in Portuguese (BR) and English.

Organization responsible for the study:
Center of Intelligence of Tourism Economics in the State of São Paulo (CITE)
State of São Paulo Travel and Tourism Secretariat (SETUR-SP)

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ANNEX I
TABLES OF INDICATORS

INSTO key issue area	Economic / Seasonality
Subject	Demand
Analysis Unit	Airport flow
Variable	Arrival of passengers by air
Indicators	•Number of national passengers •Number of regional passengers •Number of international passengers
Status	In use by CITE
Description	Passenger Movement at São Paulo Airports
Objective	Measure the evolution of demand for travelers arriving by plane: •Quantification: total volume of travellers, national, regional and international •Identify the growth or decrease of travellers
Calculations	•Sum of arrivals •Variation rate
Unit of measure	•Number (passengers, flights) •Rates of change: percentage (%)
Disaggregation level	Geographical: •Total São Paulo: São Paulo Airports Analysis: •Breakdown by residence: regional, national and international •Regular and non-regular
Calculation periodicity	Monthly
Graphic Representation (suggestion)	•Tables: year; month; airport; Passengers. •Column charts (x=time series, y=travelers' number) •Line charts (x= time series, y=variations %)
Sources	Infraero, Civil Aviation Secretariat and National Civil Aviation Agency - Operational movements of passengers in regular and non-regular transport. https://transparencia.infraero.gov.br/estatisticas/ https://horus.labtrans.ufsc.br/gerencial/#Principal https://www.anac.gov.br/assuntos/dados-e-estatisticas/mercado-de-transporte-aereo/consulta-interativa
Provider	Observatory team.
Tools	Information collected directly by the observatory team through the Infraero website.
Observations	It is recommended to deepen the source of information and try to ensure that the data provided by Infraero has a higher level of information, such as: passenger data by airport of origin or data by nationality or residence of passengers.

INSTO key issue area	Economic / Seasonality
Subject	Demand
Analysis unit	Hotel occupancy
Variable	Hotel occupancy
Indicators	•% hotel occupancy •Average stay •Number of travelers •Number of nights
Status	In use by CITE
Description	•Indicators of the level of occupancy of tourist accommodation: •Sleeping: it is understood that during the night every night that a traveler stays at the establishment. •Average stay: this variable is an approximation to the number of days that, on average, travelers stay in establishments and is calculated as the quotient between overnight stays and the number of travelers. •Room occupancy: Proportion, in percentage, between the daily average of rooms occupied in the month and the total number of rooms available. •Occupancy by places: Proportion, in percentage, between the total of overnight stays and the product of the places.
Objective	The occupancy rate and the rest of the indicators give us an idea of the wealth and progress of the accommodation sector as a business and its profitability.
Calculations	•Occupancy level (can be measured by beds or rooms, or both) = Total rooms or beds occupied in that month / Total rooms or beds available x 100 •Average stay = Total overnight stays per month / Total travelers per month
Unit of measure	•Degree of occupation (%) •Average stay = Number of overnight stays / Number of Travelers •Travelers and overnight stays: number
Disaggregation level	Geographical: •Total São Paulo •Monitored cities From analyses: •By accommodation types
Calculation periodicity	Monthly
Graphic Representation (suggestion)	•Tables •Line chart
Sources	Monthly Hotel Occupancy Survey - ABIH-SP https://abihsp.com.br/2022/01/07/resultado-da-pesquisa-do-desempenho-hotelaria-paulista-maio-2022/
Provider	Survey conducted by ABIH-SP
Tools	Survey results shared by ABIH-SP on its website on a monthly basis
Observations	Until mid-2020 the survey did not have a stable divulgation frequency. In 2021 there was a change in methodology.

INSTO key issue area	Economic / Seasonality
Subject	Demand
Analysis unit	Bus terminals
Variable	Arrival and departure of intermunicipal buses
Indicators	•Number of arrivals •Number of departures
Status	In use by CITE
Description	The flow of bus passengers, analyzing the three largest bus terminals in the state of São Paulo (Barra Funda, Jabaquara and Tietê) and considering the nine cities monitored by CITE as destination or departure point.
Objective	Measure the evolution of demand for travelers who use buses: •Quantification: total volume of travelers •Identify the growth or decrease of travelers
Calculations	•Sum of arrivals and departures •Variation rate
Unit of measure	•Number (passengers, buses) •Rates of variation: percentage (%)
Disaggregation level	Geographical: •Total São Paulo •Monitored cities
Calculation periodicity	Monthly
Graphic Representation (suggestion)	•Tables •Line chart
Sources	SOCICAM: company responsible for the concession of passenger terminals in the state of São Paulo
Provider	Observatory team
Tools	Information sent from SOCICAM directly to the observatory team, due to an agreement between both.
Observations	There are talks between the observatory and ARTESP (State Transportation Agency) for acquirement of measurement technology that will allow access to more accurate numbers

INSTO key issue area	Economic / Seasonality
Subject	Demand
Analysis unit	Regular bus charters
Variable	Arrival of charter buses on specific destinations
Indicators	•Number of arrivals
Status	In use by CITE
Description	Analysis of data from the National Land Transport Agency – ANTT, taking into account the records of regular charters at destinations monitored by CITE.
Objective	Measure the evolution of demand for travelers who use charter buses: •Quantification: total volume of travelers •Identify the growth or decrease of travelers
Calculations	•Sum of arrivals •Variation rate
Unit of measure	•Number (passengers, buses) •Rates of variation: percentage (%)
Disaggregation level	Geographical: •Monitored cities
Calculation periodicity	Monthly
Graphic Representation (suggestion)	•Tables •Line chart
Sources	ANTT - National Land Transport Agency https://www.gov.br/antt
Provider	Observatory team
Tools	Information collected by the observatory team directly from ANTT's engine accessible directly from their website.
Observations	There are talks between the observatory and ARTESP (State Transportation Agency) for acquirement of measurement technology that will allow access to more accurate numbers

INSTO key issue area	Economic / Seasonality
Subject	Demand
Analysis unit	Vehicle flow
Variable	Flow of vehicles on roads
Indicators	•Amount of vehicles on roads
Status	In use by CITE
Description	•Database on the flow of vehicles on the roads of São Paulo consisting of the reading of 65 Automatic Traffic Sensing equipment - SAT, as of January 2019. •The system records the number of vehicles (commercial and passenger) at specific points on the roads in São Paulo. •SATs were selected close to the nine monitored destinations, with daily extractions of the flow, which makes it possible to compare weekdays (Monday to Thursday) with weekends (Friday to Sunday).
Objective	Measuring the performance of the flow of vehicles on state roads with an emphasis on proximity tourism •Quantification: total volume of vehicles •Identify the growth or decrease of travelers
Calculations	•Sum •Variation rate
Unit of measure	•Number •Rates of variation: percentage (%)
Disaggregation level	Geographical: •Monitored cities
Calculation periodicity	Monthly
Graphic Representation (suggestion)	•Tables •Line chart
Sources	ARTESP: State Transportation Agency http://www.artesp.sp.gov.br
Provider	Observatory team
Tools	Information sent from ARTESP directly to the observatory team, due to an official agreement between both.

INSTO key issue area	Economic / Accessibility
Subject	Supply
Analysis Unit	Tourism industries
Variable	Accommodation services for visitors
Indicators	• Tourist accommodation by type • Total Housing Units • Total hotel units • Total accessible accommodations per hotel unit
Status	In use by CITE
Description	Quantitative indicator of the offer of accommodation: establishments, houses and squares.
Objective	Know the volume of offer available
Calculations	• Sum of establishments/dwellings, total and by variables, according to availability • Variation rate
Unit of measure	Number
Disaggregation level	Geographical: • Total São Paulo • Monitored cities From analyses: • By accommodation types
Calculation periodicity	Monthly
Graphic Representation (suggestion)	• Tables • Circular bar chart
Sources	• Ministry of Tourism (Cadastur): http://www.dados.gov.br/dataset?_organization_limit=0&organization=ministerio-do-turismo-mtur • Board of Trade of the State of São Paulo (JUCESP)
Provider	Observatory team / JUCESP.
Tools	Check the Cadastur website
Observations	There is a verbal agreement between CITE and JUCESP so that a spreadsheet is sent by JUCESP every month with information on the number of openings and write-offs of companies of this specific activity.

INSTO key issue area	Economic
Subject	Supply
Analysis unit	Tourism industries
Variable	Travel agencies and travel organizers
Indicators	• Total receptive companies • Total tour operators • Total tour guides
Status	In use by CITE
Description	Quantitative indicator of the supply of agencies.
Objective	Know the volume of offer available
Calculations	• Sum of establishments, total and by variables, according to availability • Variation rate
Unit of measure	Number
Disaggregation level	Geographical: • Total São Paulo • Monitored cities From analyses: • By types: travel agencies/receptive agencies/tour operators
Calculation periodicity	Monthly
Graphic Representation (suggestion)	• Tables • Circular bar chart
Sources	• Ministry of Tourism (Cadastur): http://www.dados.gov.br/dataset?_organization_limit=0&organization=ministerio-do-turismo-mtur • Board of Trade of the State of São Paulo (JUCESP)
Provider	Observatory team / JUCESP.
Tools	Check the Cadastur website
Observations	There is a verbal agreement between CITE and JUCESP so that a spreadsheet is sent by JUCESP every month with information on the number of openings and write-offs of companies of this specific activity.

INSTO key issue area	Economic / Accessibility
Subject	Supply
Analysis unit	Tourism industries
Variable	Provision of food, beverages
Indicators	• Total companies supply food, beverages • Restaurants • Bars and cafés • Compliance with mandatory accessibility per establishment
Status	In use by CITE
Description	Quantitative offer indicator
Objective	Know the volume of offer available
Calculations	• Sum of establishments, total and by variables, according to availability. • Variation rate
Unit of measure	Number
Disaggregation level	Geographical: • Total São Paulo • Monitored cities From analyses: • By types
Calculation periodicity	Monthly
Graphic Representation (suggestion)	• Tables • Circular bar chart
Sources	• Ministry of Tourism (Cadastur): http://www.dados.gov.br/dataset?_organization_limit=0&organization=ministerio-do-turismo-mtur • Board of Trade of the State of São Paulo (JUCESP)
Provider	Observatory team / JUCESP
Tools	Check the Cadastur website
Observations	There is a verbal agreement between CITE and JUCESP so that a spreadsheet is sent by JUCESP every month with information on the number of openings and write-offs of companies of this specific activity.

INSTO key issue area	Economic / Accessibility
Subject	Supply
Analysis unit	Tourism industries
Variable	Sports and leisure services
Indicators	• Equipment rental • Amusement and theme parks • Active tourism companies • Compliance with mandatory accessibility per establishment
Status	In use by CITE
Description	Quantitative offer indicator
Objective	Know the volume of offer available
Calculations	• Sum of establishments, total and by variables, according to availability. • Variation rate
Unit of measure	Number
Disaggregation level	Geographical: • Total São Paulo • Monitored cities From analyses: • By types
Calculation periodicity	Monthly
Graphic Representation (suggestion)	• Tables • Circular bar chart
Sources	• Ministry of Tourism (Cadastur): http://www.dados.gov.br/dataset?_organization_limit=0&organization=ministerio-do-turismo-mtur • Board of Trade of the State of São Paulo (JUCESP)
Provider	Observatory team / JUCESP
Tools	Check the Cadastur website
Observations	There is a verbal agreement between CITE and JUCESP so that a spreadsheet is sent by JUCESP every month with information on the number of openings and write-offs of companies of this specific activity.

INSTO key issue area	Economic
Subject	Supply
Analysis unit	Tourism industries
Variable	Passenger transport
Indicators	• Total passenger transport companies • Road transport • Aquatic • Transport rental • Airline companies operating with São Paulo
Status	In use by CITE
Description	Quantitative offer indicator
Objective	Know the volume of offer available
Calculations	• Sum of establishments, total and by variables, according to availability • Variation rate
Unit of measure	Number
Disaggregation level	Geographical: • Total São Paulo • Monitored cities From analyses: • By types
Calculation periodicity	Monthly
Graphic Representation (suggestion)	Tables Circular bar chart
Sources	• Ministry of Tourism (Cadastur): http://www.dados.gov.br/dataset?_organization_limit=0&organization=ministerio-do-turismo-mtur • Board of Trade of the State of São Paulo (JUCESP)
Provider	Observatory team / JUCESP
Tools	Check the Cadastur website
Observations	There is a verbal agreement between CITE and JUCESP so that a spreadsheet is sent by JUCESP every month with information on the number of openings and write-offs of companies of this specific activity.

INSTO key issue area	Economic
Subject	Supply
Analysis unit	Tourism industries
Variable	Trade in goods characteristic of tourism
Indicators	• Duty-free trade • Souvenirs • Handicrafts
Status	Under development
Description	Quantitative offer indicator
Objective	Know the volume of offer available
Calculations	• Sum of establishments, total and by variables, according to availability. • Variation rate
Unit of measure	Number
Disaggregation level	Geographical: • Total São Paulo • Monitored cities From analyses: • By types
Calculation periodicity	Monthly
Graphic Representation (suggestion)	• Tables • Circular bar chart
Sources	• Ministry of Tourism (Cadastur): http://www.dados.gov.br/dataset?_organization_limit=0&organization=ministerio-do-turismo-mtur
Provider	Observatory team.
Tools	Check the Cadastur website

INSTO key issue area	Local satisfaction
Subject	Supply
Analysis unit	Visitor opinions on offer
Variable	Visitor's opinions on destination offer
Indicators	• Number of mentions • Analysis of search trends • Non-Facebook followers • Non-Instagram followers
Status	In use by CITE
Description	Quantitative indicator of the evaluation of mentions of tourism in São Paulo in social networks and internet.
Objective	Analysis of feelings in social networks and internet about São Paulo.
Calculations	• Number of mentions • Variation rate
Unit of measure	• Number • Variations (%)
Disaggregation level	Geographical: • Total São Paulo • Monitored cities From analyses: • By mention types: positive/negative/neutral
Calculation periodicity	Monthly
Graphic Representation (suggestion)	Tables
Sources	ReviewPro https://www.reviewpro.com/
Provider	Observatory team
Tools	Information collected directly by the Observatory staff on the website.
Observations	As the universe of study is not very extensive, it is recommended to use some web monitoring tool to facilitate this task.

INSTO key issue area	Economic
Subject	Economy
Analysis unit	State Tourist GDP
Variable	State Tourist GDP
Indicators	State Tourist GDP
Status	In use by CITE
Description	Gross Domestic Product (GDP) of The Characteristic Activities of Tourism. Tourism GDP is the sum of the added value of tourism industries, but valued at buyer price, i.e. it includes taxes on net subsidy products and marketing margins.
Objective	Tourist GDP is an index that aims to provide information on the growth of the tourist sector and its contribution to the economy
Calculations	-
Unit of measurement	Number (synthetic index)
Level of disaggregation	Geographical: • Total São Paulo
Calculation periodicity	Yearly
Graphic representation (suggestion)	• Tables • Line chart
Sources	São Paulo Department of Finance
Supplier	São Paulo Department of Finance
Observations	For the calculation of this indicator, it is necessary to count on specific information that must be provided by the Secretariat of Economics of the State of São Paulo.

INSTO key issue area	Economic / Seasonality
Subject	Economy
Analysis unit	Tax collection
Variable	Taxes on tourism activities
Indicators	Taxes collected
Status	In use by CITE
Description	Taxes leased on services to the segment "TOURISM, EVENTS AND LIKE" which is the cut for tourism in the collection of taxes on services and the relationship of this indicator with seasonal tourism movements
Objective	Measure and assess the economic return to society in the form of taxes, of the activity of the tourism industry.
Calculations	-
Unit of measurement	•Number
	•Variation rate (%)
Level of disaggregation	Geographical:
	•Total São Paulo
Calculation periodicity	Monthly
Graphic representation (suggestion)	•Tables
	•Line chart
Sources	São Paulo Department of Finance
Supplier	São Paulo Department of Finance
Observations	For the calculation of this indicator, it is necessary to count with specific information that must be provided by the Secretary of Finances of de State of São Paulo.

INSTO key issue area	Employment
Subject	Economy
Analysis unit	Employment
Variable	•Direct employment •Indirect employment •Informal employment
Indicators	•Total employment in the tourism industry •Accommodation •Food •Travel Agencies •Air Transport •Ground Transportation •Waterway Transport •Transportation Rental •Culture and Leisure
Status	In use by CITE
Description	According to UNWTO, there are two ways to measure employment related to tourism. One considers all occupations in characteristic activities, regardless of whether they are related to the consumption of tourists or not. According to the UNWTO's nomenclature, this would be "employment in the tourism industries" or "employment in characteristic activities".
Objective	Measure the impact on employment of tourism industry development in São Paulo.
Calculations	•Sum (∑) of jobs •Variation rate (%) •Volume over total jobs (%)
Unit of measure	•Number •Change: percentage (%)
Disaggregation level	Geographical: •Total São Paulo From analyses: •By industry types
Calculation periodicity	Monthly
Graphic representation (suggestion)	•Tables •Bar or line chart
Sources	IPEA http://www.ipea.gov.br/extrator/simt.html CAGED/MT http://pdet.mte.gov.br/
Provider	Institute of Applied Economics Research – IPEA General Register of Employed and Unemployed – CAGED
Tools	Information collected directly by the Observatory team on the IPEA and CAGED website

INSTO key issue area	Governance / Seasonality
Subject	Destination management
Analysis unit	Social impact
Variable	Tourist pressure
Indicators	• Number of tourists per 1000 inhabitants • Number of beds available in commercial accommodation establishments per 1000 inhabitants
Status	In use by CITE
Description	• Measures the relationship between the number of tourists visiting a place and the number of residents there. • Measures the relationship between the capacity (beds) of a place and the number of residents.
Objective	• Both represent two indicators of the load capacity or tourist pressure of a place, higher or lower relative to established thresholds. • They also give us an idea of the degree of tourist development of the place.
Calculations	• Number of foreign and domestic tourists or visitors / residents in Sao Paulo (or at the urban or tourist hub level) • Number of beds / 1000 residents in São Paulo (the urban level of tourist centers)
Unit of measurement	• Ratio • Variation rate (%)
Level of disaggregation	Geographical: • Total São Paulo • Municipalities • Tourist hubs
Calculation periodicity	Annual
Graphic representation (suggestion)	Tables
Sources	Census and accommodation offer details.
Supplier	Observatory team.
Tools	Information collected directly by the Observatory team through secondary sources.

INSTO key issue area	Governance
Subject	Destination management
Analysis unit	Social impact
Variable	Security
Indicators	Number of tourists reporting to the police
Status	Under development
Description	Indicator on the number of complaints filed by tourists in Sao Paulo
Objective	The number and analysis of the complaints filed (type and location), allows to locate possible security problems, if any.
Calculations	• Summary (∑) of complaints • Rate of variation (%)
Unit of measurement	• Number • Variation rate (%)
Level of disaggregation	Geographical: • Total São Paulo • Monitored cities
Calculation periodicity	Monthly
Graphic representation (suggestion)	Tables
Sources	Police
Tools	Information collected directly by the Observatory team contacting those responsible in Polícia.

INSTO key issue area	Seasonality
Subject	Destination management
Analysis unit	Destination connectivity
Variable	Destination connectivity
Indicators	Number of bus connections and flights to other destinations
Status	In use by CITE
Description	Indicators showing the number and frequency of air and road connections for passengers, between Sao Paulo and other places.
Objective	The goal is to know and measure the degree of connectivity of the destination, with other source markets. Knowing the structure and frequency of these connections, provides information on the degree of tourist attraction that the destination has for that demand.
Calculations	• Sum (∑) • Variation rate (%)
Unit of measurement	• Number • Rates of variation: percentage (%)
Level of disaggregation	Geographical: • Total São Paulo • Municipalities • Tourist hubs
Calculation periodicity	Semiannual
Graphic representation (suggestion)	• Tables • Graphic bars
Sources	The transport companies themselves and airlines.
Supplier	Observatory team.
Tools	Information collected directly by the Observatory team through secondary sources.

INSTO key issue area	Water management
Subject	Destination management
Analysis unit	Environmental indicators
Variable	Destination resources consumption
Indicators	• Water consumption by destinations
Status	To be used by CITE from the second half of 2023 (IDB/SETUR-SP Pilot Project)
Description	Water Service Index (IAA) presents the percentage of the population effectively served by supply public water supply, based on data from the National Sanitation Information System.
Objective	The goal is to know and measure the degree of consumption of water in local destinations. Knowing the structure and frequency of these numbers, provide information on the degree of tourist pressure that the destination has for that demand.
Calculations	• Sum ($\sum$) in m^3 • Variation rate (%)
Unit of measurement	• Number • Rates of variation: percentage (%) The percentages are classified as follows: Bad – below 50%, Regular – between 50% and 90%, Good – above 90%.
Level of disaggregation	Geographical: • Monitored cities in the North Shore of São Paulo State
Calculation periodicity	Monthly
Graphic representation (suggestion)	• Tables • Graphic bars
Sources	Municipalities, Secretariat of Infrastructure and Environment https://datageo.ambiente.sp.gov.br/
Supplier	Secretariat of Infrastructure and Environment
Tools	Information collected directly by the Observatory team through secondary sources.

INSTO key issue area	Energy management
Subject	Destination management
Analysis unit	Environmental indicators
Variable	Destination resources consumption
Indicators	• Energy consumption by destinations
Status	To be used by CITE from the second half of 2023 (IDB/SETUR-SP Pilot Project)
Description	Indicators showing the numbers related to destination electric energy and oil fuel derivates consumption
Objective	The goal is to know and measure the degree of consumption of electric energy and oil fuel derivates in local destinations. Knowing the structure and frequency of these numbers, provide information on the degree of tourist pressure that the destination has for that demand.
Calculations	• Sum ($\sum$) in K.Wh for electric energy Sum ($\sum$) in Liters for Oil fuel derivates • Variation rate (%)
Unit of measurement	• Number • Rates of variation: percentage (%)
Level of disaggregation	Geographical: • Monitored cities in the North Shore of São Paulo State
Calculation periodicity	Yearly
Graphic representation (suggestion)	• Tables • Graphic bars
Sources	Municipalities, Secretariat of Infrastructure and Environment https://dadosenergeticos.energia.sp.gov.br/portalcev2/index.html
Supplier	Secretariat of Infrastructure and Environment
Tools	Information collected directly by the Observatory team through secondary sources.

INSTO key issue area	Solid waste management
Subject	Destination management
Analysis unit	Environmental indicators
Variable	Destination resources consumption
Indicators	• Waste disposed by destinations
Status	To be used by CITE from the second half of 2023 (IDB/SETUR-SP Pilot Project)
Description	Indicators showing the numbers related to destination waste disposed by tourism destinations
Objective	The goal is to know and measure the degree of consumption waste disposal services in local destinations. Knowing the structure and frequency of these numbers, provide information on the degree of tourist pressure that the destination has for that demand.
Calculations	• Sum (∑) in Tons • Variation rate (%)
Unit of measurement	• Number • Rates of variation: percentage (%)
Level of disaggregation	Geographical: • Monitored cities in the North Coast of São Paulo State
Calculation periodicity	Yearly
Graphic representation (suggestion)	• Tables • Graphic bars
Sources	Municipalities, Secretariat of Infrastructure and Environment https://datageo.ambiente.sp.gov.br/
Supplier	Secretariat of Infrastructure and Environment
Tools	Information collected directly by the Observatory team through secondary sources.

INSTO key issue area	Solid waste management
Subject	Destination management
Analysis unit	Environmental indicators
Variable	Destination resources consumption
Indicators	• Recycling by destinations
Status	To be used by CITE from the second half of 2023 (IDB/SETUR-SP Pilot Project)
Description	Indicators showing the numbers related to destination recycling by tour destinations
Objective	The goal is to know and measure the degree of waste recycling in local destinations. Knowing the structure and frequency of these numbers, provide information on the degree of tourist pressure that the destination has for that demand.
Calculations	• Sum (∑) in Tons • Variation rate (%)
Unit of measurement	• Number • Rates of variation: percentage (%)
Level of disaggregation	Geographical: • Monitored cities in the North Shore of São Paulo State
Calculation periodicity	Yearly
Graphic representation (suggestion)	• Tables • Graphic bars
Sources	Municipalities, Secretariat of Infrastructure and Environment https://datageo.ambiente.sp.gov.br/ https://www.infraestruturameioambiente.sp.gov.br/verdeazuldigital/
Supplier	Secretariat of Infrastructure and Environment
Tools	Information collected directly by the Observatory team through secondary sources.

INSTO key issue area	Climate action
Subject	Destination management
Analysis unit	Environmental indicators
Variable	Destination resources consumption
Indicators	• Emission of greenhouse gases (GhG)
Status	To be used by CITE from the second half of 2023 (IDB/SETUR-SP Pilot Project)
Description	Indicators showing the numbers related to destination natural resources management
Objective	The goal is to know and measure the degree of consumption of natural resources in local destinations. Knowing the structure and frequency of these numbers, provide information on the degree of tourist pressure that the destination has for that demand.
Calculations	• Sum ($\sum$) in 10^3 ton/year • Variation rate (%)
Unit of measurement	• Number • Rates of variation: percentage (%)
Level of disaggregation	Geographical: • Monitored cities in the North Shore of São Paulo State
Calculation periodicity	Yearly
Graphic representation (suggestion)	• Tables • Graphic bars
Sources	Municipalities, Secretariat of Infrastructure and Environment https://datageo.ambiente.sp.gov.br/ https://cetesb.sp.gov.br/publicacoes-relatorios/ https://www.infraestruturameioambiente.sp.gov.br/verdeazul digital/
Supplier	Secretariat of Infrastructure and Environment
Tools	Information collected directly by the Observatory team through secondary sources.

ANNEX II
TECHNICAL COOPERATION BETWEEN THE INTERAMERICAN DEVELOPMENT BANK AND THE SÃO PAULO STATE TRAVEL AND TOURISM SECRETARIAT

1.1. The objective of the IDB / SETUR-SP technical cooperation is to support the São Paulo State Travel and Tourism Secretariat in the preparation and preliminary implementation of a recovery and revitalization plan for the tourism sector, considering the impacts of the Covid-19 pandemic in tourism activity. The specific objectives of the technical cooperation are: (i) the definition of medium and long-term strategies and actions that must be implemented to reactivate the sector; (ii) the elaboration of complementary studies that support the implementation of the planned actions; and (iii) the improvement of processes, procedures and criteria for granting credit to companies in the sector, as well as the identification of available funding sources, considering the criticality of access to credit for the survival of the sector's business fabric. Studies supported by this technical cooperation will assess the opportunity for the introduction of other financial, guarantee and capital market instruments more suited to the problems faced, as well as opportunities to promote financial innovations.

1.2. The cooperation is aligned with the urgent need to support countries in the economic recovery in the post-pandemic period, especially relevant in highly affected sectors such as tourism, as well as with the second update of the Bank's Institutional Strategy 2010-2020, **as it contributes to the increase in the institutional capacity of the São Paulo State Travel and Tourism Secretariat in the establishment of strategic sectorial policies.** The scope of cooperation also provides for complementary studies that can support the future preparation of a loan operation for the implementation of actions prioritized by the recovery plan:

1.3. **Component I: Recovery Plan for the Tourism Sector in the State of São Paulo.** The objective of the component is to prepare a recovery plan for the tourism sector in São Paulo in response to the impacts generated by the pandemic. The plan includes the design of strategies to guide the actions of the Travel and Tourism Secretariat in the medium and long term, the delimitation of an operational plan of actions to be implemented and indicators for its monitoring. The plan is based on a comprehensive diagnosis of tourism in São Paulo, analyzing aspects of supply, demand and competition and the different realities of each of the regions of the state. It is prepared taking into account possible synergies with the planning efforts already undertaken by the Secretariat, avoiding overlapping initiatives. The plan preparation process includes consultations with key stakeholders in the sector, including public sector representatives at the municipal level, the private sector and NGOs, so that the proposed strategies and solutions reflect their reality and are tailored to their needs, potentially enabling collaboration between public and private initiative. The proposed actions also take into account recommendations from international organizations on best practices to deal with the crisis in the sector caused by the pandemic, compiling successful actions in other destinations that can be adapted to the local reality. The strategies defined are aligned with the IDB's action pillars in the sector, framed in the Tourism Sector Structure and providing for the social, economic and environmental sustainability of the proposed actions. **The expected product for the component is the consolidation of a recovery plan for the tourism sector in the state of São Paulo, containing strategies, actions and indicators that allow monitoring the recovery of the sector in the new reality imposed by the pandemic.**

1.4. Component II: Complementary studies for the implementation of the tourism sector recovery plan. Based on the plan previously prepared, complementary studies were carried out with the objective of providing a basis for the implementation of the priority actions of the plan, through a future loan operation with the IDB or through other sources of financing. The component includes, among others: market and demand analysis; the preparation of assessments of the sector's environmental sustainability; analysis of its institutional capacity; education plans geared towards tourism. The studies supported by the component assess the opportunity for the introduction of other financial, guarantee and capital market instruments better suited to the problems faced, as well as opportunities to promote financial innovations.

1.5. IDB's experience in the planning and execution of lending operations in the tourism sector has allowed it to identify some key issues for its success, including: (i) the planning and scaling of investments are essential to prevent and mitigate negative impacts of a disorderly growth of tourism; (ii) the development of tourism must incorporate a tangible environmental commitment, with the objective of contributing to the prevention and mitigation of impacts, adaptation and resilience of the sector against climatic and natural threats; (iii) development programs must balance initiatives solely related to tourism infrastructure and the strengthening of the sector's institutionality and governance; and (iv) to avoid one-off and low-impact investments, tourism interventions must be framed in tourism development models or plans, focused on types of tourism with the ability to successfully position themselves in specific demand segments, based on reliable information about the market. The studies carried out are aligned with the lessons learned by the IDB in the sector, in order to establish a technical basis for the future execution of the program. In addition, they establish the basis for the Travel and Tourism Secretariat to implement the actions prioritized by the recovery plan, allowing efforts to focus on finding partners for its execution. An additional product covered in the studies will allow the elaboration of a draft project for a future credit operation, including its objectives, components, results and products matrix, estimated value, operation territory, etc. **The products for the component are three complementary studies for the implementation of the plan, which may include: (i) demand and market analysis for the sector; (ii) assessment of its environmental sustainability; and (iii) analysis of its institutional capacity.**

1.6. **Component III: Support for improving the dynamics of granting credit to the sector.** The component aims to map the supply and demand of credit to companies, establishing recommendations for improvements in the dynamics of granting credit to tourism companies in the state of São Paulo. Maintaining the industry's business structure is essential for the post-pandemic recovery, considering both its potential for job creation and maintenance and its pivotal role in enabling travel and tourism dynamics to be possible. This underscores the importance that the credit supply available to these companies, especially in the medium and long term, is suited both to the specifics of their operation and to the unprecedented situation imposed by the pandemic. In this sense, the proposed study will identify: (i) the main lines of credit currently available to companies in the sector, especially those operated by the State itself through its development agencies; (ii) the characteristics of the existing demand for credit, considering companies according to their size; (iii) culminate in the identification of bottlenecks and recommendations for improvements to be systematically implemented in the granting of credit. Information collected from secondary sources will be used, as well as direct consultations with a sample of companies in the sector, along with sectoral associations, unions and financial institutions. **The component will also include training the state team, in relation to the recommendations made. The product generated by the component is a document of guidelines and recommendations for granting credit to companies in the tourism sector in the state of São Paulo.**

PILOT PROJECT TO MONITOR SUSTAINABLE TOURISM MANAGEMENT INDICATORS ON THE NORTH COAST OF THE STATE OF SÃO PAULO

The preliminary design of the sustainable management indicators system for tourism in the North Coast region began in October 2021 and included a discussion on local, regional and state management objectives, a case study on good practices of similar national and international systems, research of available data sources and definition of desirable indicators. **A schedule was built for carrying out the activities, which culminated in the presentation of a manual to the municipalities of the North Coast in June 2022.**

The strategy for defining the monitoring system and for defining the indicators followed the methodology proposed by the UNWTO in its guide "Indicators of Sustainable Development for Tourism Destinations – A Guidebook" (UNWTO, 2004). The methodology was updated following the guidelines of the INSTO (International Network of Sustainable Tourism Observatories) framework (UNWTO, 2016) and the strategy heeded the following steps:

1. Region definition
2. Local, regional and state management objectives
3. Identification of the main tourist areas, pressure vectors and risks
4. Case studies and best practices
5. Availability of indicators
6. Stakeholder consultation
7. Selection of desirable indicators and definition of the preliminary list of indicators
8. Definition of the monitoring process
9. Test

The final result was the creation of a methodological guide, containing the monitoring system and operation manuals, to be used by the cities of the North Coast and with results expected by the second half of 2023 when there will be an evaluation of results and study to expand the scope of the monitoring within the state of São Paulo.

The coordination of the system will be in charge of CITE. The North Coast Consortium will liaise with the Municipal Tourism Secretariats and Municipal Tourism Observatories, where possible, including sustainability indicators in the monthly questionnaire that is completed by municipalities for monitoring Tourism Performance Indicators.

The indicators proposed follow the main forces identified in national and international models, in particular: INSTO, GSTC D, European Tourism Indicator System (ETIS), Programa Município VerdeAzul and Invisible Burden. In addition, the indicators are directly related to the SDGs.

Following the model adopted by the European Commission (ETIS, 2016), the list presents main indicators (core) and optional indicators. The idea is to work with a model that is feasible in the short term, composed of the main indicators, and to promote the gradual inclusion of optional indicators that will allow a more complete diagnosis of the different dimensions of sustainability.

From the Invisible Burden, economic indicators were incorporated that go beyond the benefits generated by tourism, restricted to tax collection, job creation and revenue from the sector. The objective was to incorporate indicators that measure the costs of the municipalities with the activity, including data such as municipal expenditure on health, safety, transport, etc., as well as indicators that show local inflation and impacts on the population.

Added to the eleven INSTO key issue areas were three more, with a view to identifying the main pressure vectors in the region, according to PESTEL Analysis: mobility, biodiversity and sociocultural aspects.

A total of 56 indicators were selected, divided among the 14 areas to be monitored. Most of the management indicators, based on the GSTC, will be constructed through a pre-formatted spreadsheet that contains a detailed version of each of the indicators, as well as their baselines, which must be updated periodically following the procedures established in the manual delivered to the municipalities of the North Coast.

It is also important to reinforce the significance of collecting primary indicators at the local level, especially the maintenance of perception surveys, visitor volume estimates, seasonality, tourist perception, access to the Service Tax collection database, among others.

With the data collected, it will be possible to carry out an analysis of indicators through the crossing of indicators, the elaboration of composite indexes, such as a sustainability management index (GSTC) and/or a finalistic sustainability index and/or a general index of sustainability (management + finalistic).

The communication of the indicators system for sustainable tourism management in the North Coast region of São Paulo will follow the same model already adopted by CITE for the dissemination of the Tourism Performance Indicators of the North Coast Circuit - that is, through interactive dashboards, based on Microsoft Power BI or Google Data Studio.

The information can also be replicated by the North Coast Circuit Observatory and the Municipal Tourism Observatories, adding to the indicators that are already disclosed by them.

INDICATORS

These are the 56 indicators that will be monitored by the North Coast municipalities for the pilot project

AREA	INDICATORS	FREQUENCY
Seasonality	• Hotel occupancy	Monthly
	• Number of products sold by local travel agencies	Monthly
	• Vehicle flow	Monthly
	• Management of visitor volume and activities	Yearly
Employment	▪ Flow of formal jobs in tourism	Monthly
	▪ Percentage of jobs in tourism compared to total jobs in the municipality	Monthly
	▪ Decent work and career opportunities	Yearly
Economic Impact	• Number of accommodation facilities	Monthly
	• Value of the basic-needs grocery package	Monthly
	• Bare land value	Yearly
	• Municipal expenses	Yearly
	• Support for local businesses and fair trade	Yearly
Governance	▪ Existence of Municipal Tourism Council	Yearly
	▪ Existence of a fund or financial resources managed by the Municipal Tourism Council	Yearly
	▪ Seat for traditional communities on the Municipal Tourism Council	Yearly
	▪ Resident participation and feedback	Yearly
Local Satisfaction	• Tourism is good for the municipality (tourism perception survey)	Yearly
	• Tourism is good for the population (tourism perception survey)	Yearly
	• Resident participation and feedback	Yearly
Energy Management	▪ Annual electricity consumption	Yearly
	▪ Consumption of petroleum derivatives and ethanol	Yearly
	▪ Energy conservation	Yearly
Water Management	• Water service index	Yearly
	• Raw water quality index for public supply purposes	Yearly
	• Coastal water quality index	Yearly
	• Beach bathing	Weekly
	• Water quality index	Yearly
	• Monthly water consumption	Monthly
	• Water management	Yearly
Sanitary Sewage	▪ Percentage of sewage collection	Yearly
	▪ Sewage treatment percentage	Yearly
	▪ Urban population sewage collection and treatability indicator	Yearly
	▪ Wastewater	Yearly
Solid Waste Management	• Solid waste collection	Monthly
	• Waste landfill quality index	Yearly
	• Solid waste management index	Yearly
	• Quality index of transhipment stations	Yearly
	• Number of registered waste picker entities	Yearly
	• Waste	Yearly
Accessibility for People with Disabilities	▪ Consistent application of accessibility standards in public facilities	Yearly
	▪ Data on the scope/proportion of accessible visitation sites and equipment	Yearly
Climate Actions	• Annual energy consumption and CO_2 emissions	Yearly
	• Vehicle fleet	Yearly
	• Air quality index	Yearly
	• Slip hazard	Yearly
	• Flood hazard	Yearly
	• Greenhouse gas emissions and climate change mitigation	Yearly
Biodiversity	▪ Percentage of municipal territory with native vegetation cover	Yearly
	▪ Environmental infraction notices	Monthly
	▪ Existence of the Environment Council	Yearly
	▪ Protection of sensitive environments / ecosystems	Yearly
Mobility	• Low impact transport	Yearly
Sociocultural Aspects	▪ Number of police reports registered by municipality	Monthly
	▪ Existence of legislation to support culture	Monthly
	▪ Subnormal agglomerations (precarious housing)	Yearly

ANNEX III
DATA SOURCES ON TOURISM MARKET INTELLIGENCE

1. TRADITIONAL SURVEYS

Traditional surveys use techniques very often used by any intelligence nucleus, such as field studies, sending out questionnaires, conducting focus groups, telephone polls, contracting research banks, among other on-demand activities. Many of these practices require manual analysis and processing, such as tabulating and observing the results, to better understand the scenario.

The Tourism Barometer, coordinated by the World Tourism Organization (UNWTO), the Characterization of Domestic and International Tourism Demand, the studies, the Monthly Survey of Services in Tourism Activities carried out by the Brazilian Institute of Geography and Statistics (IBGE) and the studies carried out by Tourism Observatories throughout Brazil are part of this universe.

2. SEASONAL SURVEYS (sponsored by private companies)

Companies in the tourism sector, especially large corporations such as tour operators, hotel chains, online travel agencies, airlines, carry out market studies focused on their areas of expertise, in order to produce relevant knowledge for the entire market, in addition to the public and academic sectors.

Typically, these studies are focused on open and public data, which can be disclosed and used without exposing confidential information or information that violates the General Data Protection Law (LGPD).

In addition to the companies, many professional associations also produce complete studies, such as the Brazilian Association of Travel Agencies - ABAV, the Brazilian Union of Fair and Event Companies - BRAZTOA or the Brazilian Association of Airline Companies - ABEAR.

The scope of the studies and the quality of the information collection must be observed when using the data, so that, if there is a need to cross-reference them with other existing studies, there is no inconsistency in the analyses.

Still, some of these studies are not carried out with a fixed periodicity. There is always the need to check the date of the research.

3. DATA MINING

Data mining uses electronic tools and computers and has previous calculation methods for analyzing large volumes of data collected, not only from one source, but from many and, if necessary, simultaneously. Data mining can be exemplified with data based on physical actions, such as analysis of traffic reports on highways, landings, departures, departures and arrivals of passengers at all airports in the national territory, or data from internet-based activities, such as monitoring cookies on websites to measure access, searches, reservations

and purchases for certain products and services in Online Travel Agencies (OTAs) or even monitoring and analysis of comments on social networks about tourist destinations and services throughout Brazil.

The UNWTO Recovery Tracker, the Buenos Aires Tourism Observatory, the Air Transport Market Indicators of the National Civil Aviation Agency (ANAC) and the Espírito Santo Tourism Demand and Flow Survey, carried out through mobile phone signals are some practical examples of using data mining for tourism.

Listed below are examples directly related to data mining practices involving tourism monitoring and other applicable cases.

3.1. UNWTO Recovery Tracker

The System called Recovery Tracker of the World Tourism Organization consists of several dashboards that gather relevant information on the following items:

- International tourist arrivals
- Seating capacity on international and domestic air routes,
- Air travel reservations,
- Hotel searches and reservations,
- Occupancy rates and short-term rental demand
- Feeling of travel (Net Sentiment Score)
- Covid-19 14-day notification rate per 100,000 population

Dashboard Examples

Figure 1 refers to the means of accommodation, where we have data on searches, reservations, occupancy rates, searches by destinations and rentals by application (Airbnb). You can filter data by world regions and countries (when available).

Source: UNWTO, 2022 - https://www.unwto.org/unwto-tourism-recovery-tracker
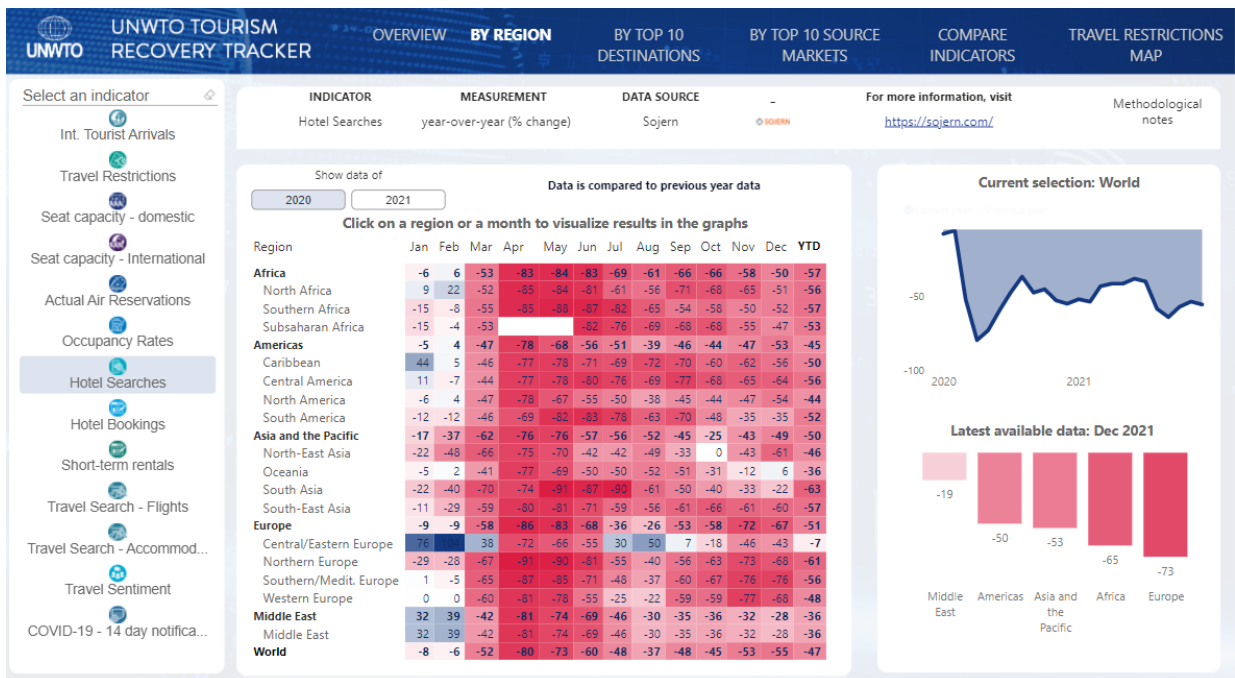
Figure 2 focuses on hotels, where it is possible to monitor occupancy rates in 2020 and 2021. Importantly, 2021 data is compared with 2019 for a better analysis with a pre-pandemic period. This is a recommendation from the World Tourism Organization not only for this indicator, but for all others:

Source: UNWTO, 2022 - https://www.unwto.org/unwto-tourism-recovery-tracker
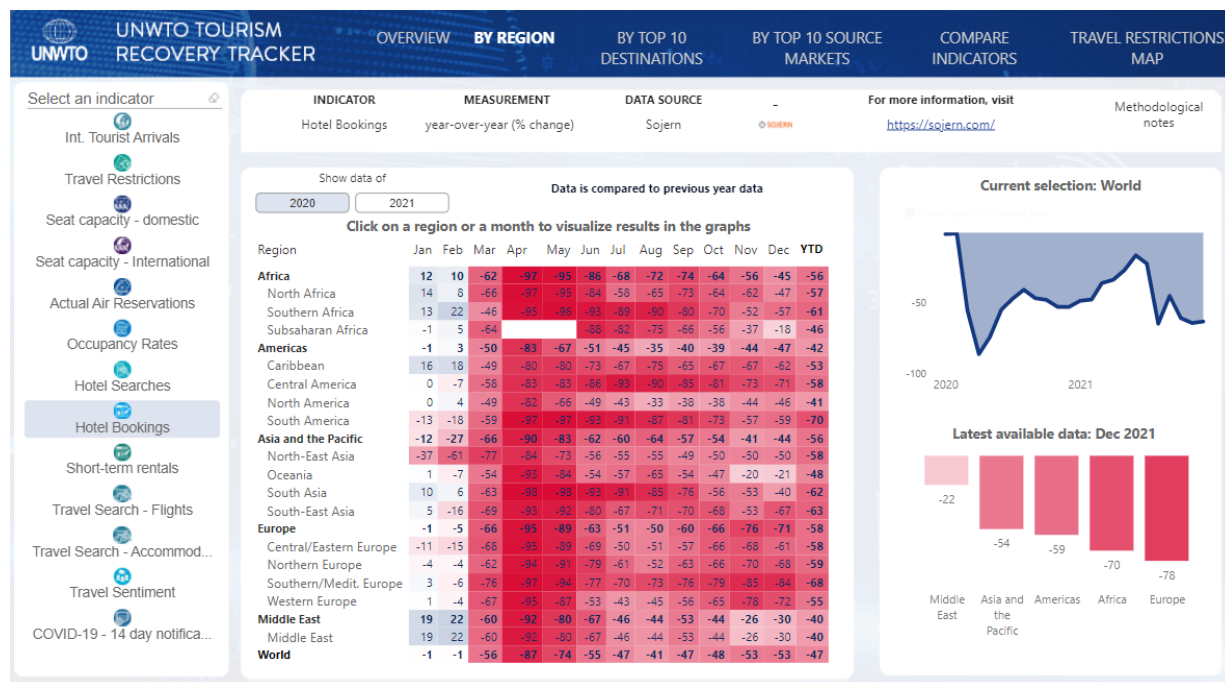
Functionalities

The data available on the UNWTO dashboards allow for analyses and cross-referencing at a regional and sub-regional level in some of the main countries, considering the volume of tourists and local monitoring carried out. Still, queries related to searches for air tickets and hotels provide a powerful source for future forecasts, as there is also data related to the anticipation of travel purchases.

All dashboards have detailed methodologies and direct access to information sources, some with the possibility of downloading.

3.2. Air Transport Market Indicators – National Civil Aviation Agency

In Brazil, the preparation and dissemination of studies on air transport market conditions are part of the legal powers of the National Civil Aviation Agency (ANAC) and have been formally conferred on the Superintendence of Monitoring of Air Services (SAS).

Traditionally, data are used to support the legislative process, the elaboration of public policies and the regulatory process that covers the sector, as well as for investment planning and the taking of various strategic decisions in the marketing field, such as market prospecting, competitive actions and planning of fleet, airport infrastructure and air navigation.

Data are available on an interactive dashboard called Interactive Consultation – Air Transport Market Indicators:

Figure 3: Interactive Consultation Dashboard – ANAC

Source: National Civil Aviation Agency/Interactive Air Market Consultation

The available data on ANAC's dashboard are subdivided into two areas:

- Demand and supply: seat utilization data, departures, paid passengers, statistics based on kilometers offered, kilometers paid and freight and mail. The filters available for consultation and the level of disaggregation range from continents to regional airports throughout the national territory.

- Average Fare: fare data is available by average distance, number of registered seats, average airfare and yield (R$/kilometers covered).

Figure 4: Average airfare data per connection
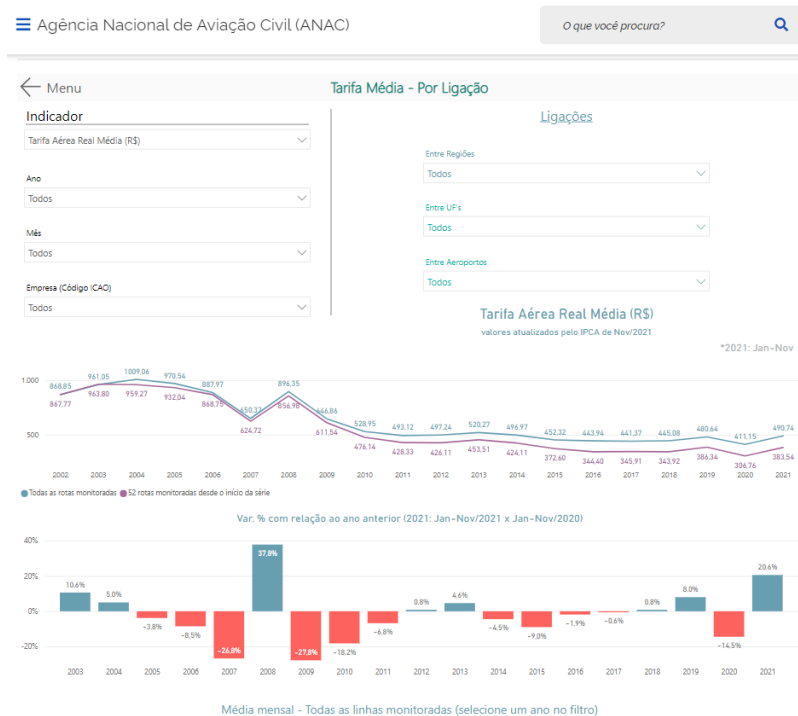
Source: National Civil Aviation Agency/Interactive Air Market Consultation

The data are used both for analyzing the results of the air market, considering a set of filters that allow for a breakdown even at the level of regional airports, and for forecasting analysis, since data on future airline bookings are also available.

In this way, the set of information that can be extracted from the dashboard can be used for analysis of both the domestic and international market, considering the offer of flights to all airports that have connections with other countries.

3.3. Job Analysis Dashboard – Ministry of Labor

In January 2020, the use of the General Register of Employed and Unemployed Persons System (CAGED) was replaced by the Digital Bookkeeping System for Tax, Social Security and Labor Obligations (eSocial). Thus, Novo (New) CAGED brings together, in interactive dashboards, a series of data aimed at formal employment of all National Codes of Economic Activity (CNAEs), making it possible to filter data at a level of disaggregation that extends to Brazilian municipalities.

Also, considering the recommendations of the World Tourism Organization, it is possible to filter activities directly related to tourism to monitor the balance of jobs related to the segment.

Figures 5 and 6: CAGED Information Dashboard
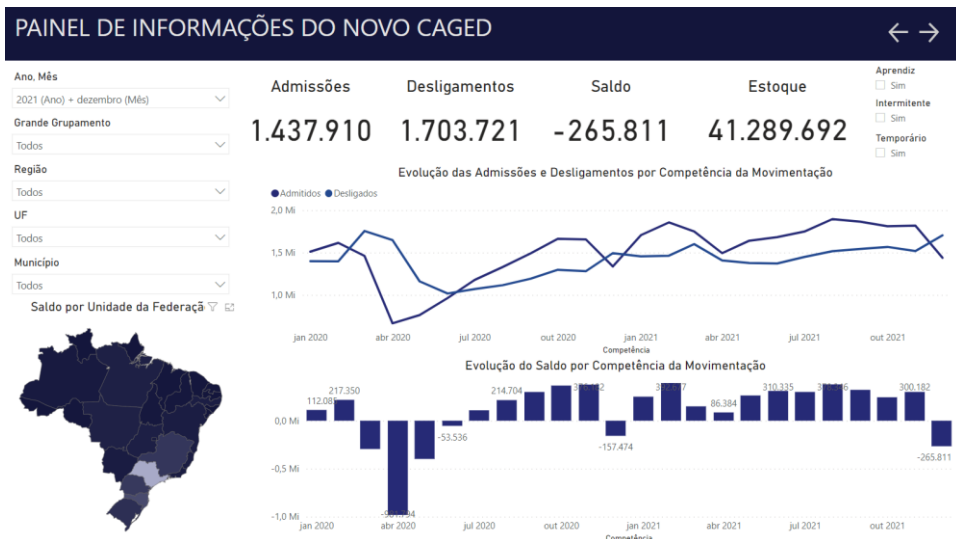
Source: Novo CAGED, 2022

4. TRENDS

New market research sources to which data mining processes can be applied include smartphones, text message surveys, and GPS-generated data that identify and track tourist movements in a particular destination. Monitored trends generate reports on buying behaviors and habits that go beyond travel and focus on the lifestyle of those surveyed. This information can certainly help identify optimal marketing messages and figure out how to deliver advertising, using, for example, location-based marketing.

The Travel Trends interactive graphics, provided by the Kayak Travel Metasearch; the Presence Technology, used by the organization of the Rock In Rio Music Festival to monitor the event's audience; and the Costa Verde & Mar initiative in Santa Catarina for the use of beacons (customized messages via B

luetooth) for tourists are examples of the use of prior information on trends.

4.1. Travel Trends Dashboard – Kayak Metasearch

The Kayak Travel Metasearch provides an interactive dashboard containing analyses of more than one billion flight searches to measure traveler interest in certain destinations, always using a listed country of origin as a basis.

Figure 7: Travel Trend Dashboard – Kayak Metasearch

Buscas de voos domésticos vs. internacionais

Uma análise dia a dia do interesse de pesquisa por voos no país selecionado, em comparação com o mesmo dia dois anos antes.
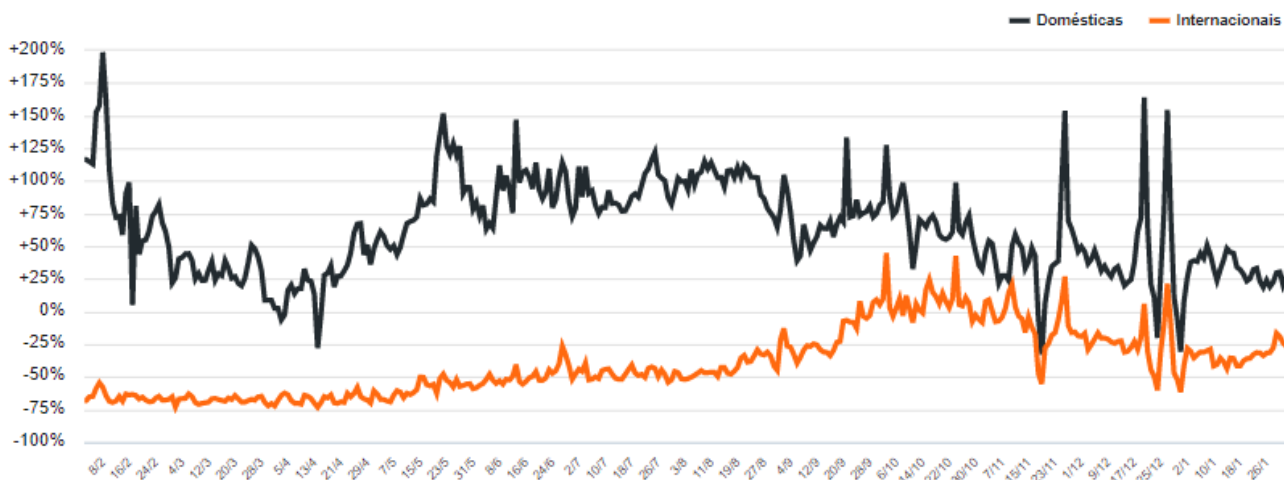
Source: Kayak, 2022

It is important to emphasize that this tool does not make reservations It only determines the volumes of indexed searches. Following the recommendations of the World Tourism Organization, the 2021 data are compared with the same period in 2019, for a better analysis of the results obtained.

4.2. World Travel and Tourism Council

As a voluntary organization, the World Travel and Tourism Council (WTTC) provides reports and insights on tourism globally and for regions and countries that make it possible to quantify the direct and total impact of travel and tourism on local economies in terms of GDP and growth of employment. All the methodology used by the WTTC is carried out in conjunction with Oxford Economics, covering 185 countries and 25 geographic or economic regions in the world. These reports are an important tool for use by the public and private sector, as well as academia, with concrete evidence of the enormous value that travel and tourism bring to the economy.

The reports can be accessed on the organization's website and free of charge. However, it is possible to become a board member for more comprehensive access to open data.

4.3. Other sources of trending data

Although it is not the core business of these companies, a large volume of tourism data and statistics are generated by airline ticket distribution tools, such as Amadeus and Saber, as well as Online Travel Agencies (OTAs), such as Booking.com and Decolar.com. These companies publish a series of reports, enabling, albeit to a limited extent, an understanding of the markets in which they operate. It is important to emphasize that they have products for monitoring such data on a paid basis, including the construction of interactive dashboards.

Furthermore, companies such as Euromonitor International and ForwardKeys provide a service based on comprehensive access to global ticketing data from online reservations, travel agencies and airlines. These datasets are accessed through one or more custom products or dashboards, each targeting a different level of data access and covering a separate market segment. In the case of ForwardKeys, the ashboards allow you to check future demand in searches and bookings already made up to one year in advance. This is a tool currently being used by the Rio Grande do Norte Tourism Department and by several countries, and is recognized as an excellent form of tourism planning.

Other relevant information sources are online market research platforms such as Opinion Box, Marketagent, ySense, among others. These platforms consist of large registers of participants who are called, based on a specific profile, to give their opinion on certain issues. Thus, it is possible to carry out surveys aimed at the habits and desires of consumers in an agile manner and with great reliability and sampling.

ANNEX IV

TOURISM OBSERVATORIES

Slisted below are some of the most active tourism observatories in Brazil and the world, as well as their main activities carried out

Name of the Initiative	Observatory of Tourism and Events of the City of São Paulo (Brazil)
Responsible organization	São Paulo Turismo - SPTuris
Year of creation	2005
Introduction	The Tourism and Events Observatory of the City of São Paulo (OTE) is considered one of the oldest in Brazil and a reference for dozens of similar initiatives throughout the country.
General objectives	To analyze the behavior of tourism in the city of São Paulo, contributing to the investigation and dissemination of information to professionals, specialists, academics, public and private agents, supporting them in decision-making with the purpose of knowledge, improvement and development of the tourism sector in the city of São Paulo.
Activities and scope	Performance of the means of accommodation; Collection of ISS tax on tourism; Airport and road transport; Assistance at the Tourist Information Centers; Segment searches; Tourist profiles, demand projection; Hotel occupancy and average daily costs, frequency and permanence/seasonality; Events and mega-events; Food & Beverage; Tourist Demand (flows and satisfaction); Flow and travel trend analysis; Impact of tourism on tourism finances and income and on the sustainability of the city's natural resources.
Data sources	Own surveys and secondary data from public and private sources.
Strengths and weaknesses	Strengths: Site with constant updating of the work carried out (monthly and according to research carried out in events); speed in carrying out studies and research analysis at events; graphically attractive reports for data consumption; formal partnerships with research institutes and economic data providers. Weaknesses: Lack of budget for carrying out annual tourist demand studies and tourist counts; Observatory linked to the public company with many activities in duplication with the direct administration.
Website	www.observatoriodoturismo.com.br
Contacts	Mansur Bassit (Manager of the Tourism and Events Observatory) pesquisa@spturis.com

Name of the Initiative	**Minas Gerais State Tourism Observatory (Brazil)**
Responsible organization	Secretariat of Culture and Tourism of Minas Gerais
Year of creation	2013
Introduction	The Minas Gerais Tourism Observatory is a network which purpose is to monitor the development of the sector in the state, with several indicators available.
General objectives	Monitor the development of tourism through surveys, data, numbers and the development of indicators, so that the information can be viewed in a practical, easy and fast way, helping in the planning of actions and decision-making for the government, private initiative and others involved in tourism in Minas Gerais.
Activities and scope	Analysis of the labor market (employment and worker profile); Airport and road transport, tourist trains; Tourist Demand (flows and satisfaction); Hotel Occupation and average stay; Visits to Natural Parks and Monuments and positioning of tourist circuits; Formal Tourism Economics; Tourist flow and impact of tourism on tourist income (expenses); Main countries that send tourists; Access Control to Social Networks; Minas Gerais Image Search.
Data sources	Own research from primary and secondary sources, from public and private sources
Strengths and weaknesses	Strengths: Capillarity between tourist municipalities to collect data on tourism supply and demand; well-defined structure with a specialized technical team; interactive dashboards structured in a market intelligence tool; the Tourism Observatory of Minas Gerais is a research body regulated by Law No. 22765, of 12/20/2017, and Decree No. 47.526, of 11/06/2018.

Weaknesses: Lack of agility in the dissemination of studies and research carried out; little analysis in the reports, with most of the data just transcribed information. |
| **Website** | https://www.observatorioturismo.mg.gov.br/ |
| **Contacts** | Julia Boroni (coordinator) observatorioturismo@secult.mg.gov.br |

Name of the Initiative	Espírito Santo State Tourism Observatory (Brazil)
Responsible organization	Espírito Santo Tourism Office
Year of creation	2014
Introduction	The Espírito Santo Tourism Observatory is responsible for carrying out studies and research and disseminating information on the evolution of tourism activity in the territory.
General objectives	Monitor the performance of the tourism sector through specific indicators; regularly and periodically inform the evolution of tourism activity; Subsidize, through technical studies, the implementation of sectoral policies; Generate information to attract private investments, in accordance with regional development plans, and Provide local managers with tools to carry out research, studies and feed the information system.
Activities and scope	Tourist profile, socioeconomic data, origin and travel motivation of tourists; Transport and car rental; Average expenses on food, shopping, tours and attractions; Priority means of accommodation and destinations; Travel frequency and permanence; Activity carried out in the municipality (preferences for tours and attractions, leisure); Travel organization (agency, company, tourist, educational institution); Assessment of tourism infrastructure and services; Tourist flow by season; Seasonality of the main destinations; Recommendation of the municipality to friends; High/Medium/Low seasons demand; Impacts and results of events (scope and frequency, Itinerancy)
Data sources	Own research from primary and secondary sources, from public and private sources
Strengths and weaknesses	Strengths: Website organized and frequently updated; use of data for planning, promoting and serving the media; use of mobile phone data to supplement primary information. Weaknesses: Lack of graphic attractiveness in reporting; need for further analysis.
Website	https://observatoriodoturismo.es.gov.br/
Contacts	Rafael GranVilla (coordinator)

Name of the Initiative	City of Buenos Aires Tourism Observatory (Argentina)
Responsible organization	Buenos Aires Tourism Secretariat – Market Intelligence Directorate and Observatory
Year of creation	2009
Introduction	The Tourist Observatory of the City of Buenos Aires researches and analyzes data regarding the flow of tourists, preferences and economic and social impact on the City.
General objectives	Analysis and monitoring of variables that directly and indirectly affect the behavior of tourism activity in the local, national and international context; short and medium-term behavior projections according to recent trends; discover the variations in behavior and consumption habits of residents and tourists who visit the City of Buenos Aires or participate in events that make up the cultural offer.
Activities and scope	Constant monitoring of economic impacts, employment in tourism, public and private investments, market forecasts, hotel occupancy, movement of tourists through the city via mobile phone signal, tourist spending, air connectivity, hospitality and gastronomy.
Data sources	Primary surveys and secondary data from public and private entities.
Strengths and weaknesses	Strengths: Prepare periodic reports with key indicators that allow the projection of future trends, apply Big Data techniques to analyze new sources of information and better understanding of the environment, carry out qualitative investigations on the behavior of the main segments and markets. Weaknesses: tourist mobility data are part of a single contract between telephone companies and the city of Buenos Aires, therefore, data can only be analyzed in isolation, without comparison factors with other tourist destinations in the country; Much of the data has the year 2019 as the last data update.
Website	https://turismo.buenosaires.gob.ar/br/observatorio
Contacts	observatorioturistico@buenosaires.gob.ar

Name of the Initiative	Canary Islands Tourism Observatory (Spain)
Responsible organization	Directorate of Tourism Intelligence Projects, Studies and Connectivity / Tourism, Industry and Commerce Council.
Year of creation	2004
Introduction	The Canary Islands Tourism Observatory is managed by the Canary Islands Tourism Council, where regional and island tourism administrations, the main municipalities together with representatives of private companies and organizations, outline the main guidelines for tourism for the tourist policy.
General objectives	The observatory is structured in several areas of work to promote its effectiveness: strategy, economy and business, social affairs and environmental issues. The structure is flexible and dynamic to adapt to changing industry needs.
Activities and scope	Local satisfaction with tourism and local well-being; work skills, entrepreneurship and employment; Destination innovation, economic impacts and benefits; Tourism seasonality; tourism, culture, leisure and tourist satisfaction products; Digitization, knowledge and smart tourism; Energy management; Water and sewage management; Solid waste management; Impacts and mitigation of climate change; Governance and territorial scale of analysis and policies; Connectivity and air transport intermediation; Overtourism, holiday homes and mass tourism; Destination maturity and renewal; Universal accessibility and inclusion.
Data sources	Primary surveys and secondary data from public and private entities.
Strengths and weaknesses	Strengths: Quality and representativeness of research carried out; broad set of indicators, considering demand, supply and sustainability; Level of disaggregation possible to municipalities in the Islands.

Weaknesses: Lack of interactive dashboards with the possibility of filtering available data, although available data can be downloaded in open format; observatory site is not pleasant to browse. |
| Website | http://www.gobiernodecanarias.org/turismo/estadisticas_y_estudios/index.html |
| Contacts | María Guardiet de Vera – mguardiet@turismodecanarias.com |

Name of the Initiative	Thompson Okanagan Tourism Observatory (Canada)
Responsible organization	Thompson Okanagan Tourism Association
Year of creation	No information
Introduction	The Thompson Okanagan Tourism Association (TOTA) monitors a wide range of sustainable tourism indicators from within the region. Monitoring is done using primary and secondary surveys carried out directly by TOTA, as well as through various governmental and non-governmental stakeholders.
General objectives	Provide insights into more than 30,000 variables including demographics, consumer preferences, lifestyles and values linked to zip codes; Monitoring the main market segments in the region, what they are interested in doing and where more people like this live across Canada. The main gain of this structure is to offer data to adapt marketing efforts, communication strategies, products and experiences, to align with who your current visitors are, or who might be your ideal customer.
Activities and scope	Local satisfaction with tourism; Destination economic benefits; Employment, HR/labor; Seasonality; Energy management practices; Water management practices; Waste management practices; Battery capacity; Climate change and increase in weather-related events; Intraregional connectivity; Indigenous products, experiences and impacts on the community; Land use (cross industry); Sustainable tourism practices; Universal Inclusion.
Data sources	Thompson Okanagan Tourism Association's research services division, Symphony Tourism Services, offers customized research based on visitor and market data, using information provided by various sources.
Strengths and weaknesses	Strengths: Analytical reports based on a different concept than tourism observatories: market segments such as senior tourism, suburban tourism, nightlife, among others; the structure of the observatory in a partnership format with marketing research centers brings modernity to the activities carried out; Basically, all tourism monitoring carried out by the Observatory with a focus on demand is sourced from large volumes of data from social networks and reviews on travel websites and applications. Weaknesses: access to the reports is not immediate: it is necessary to redirect them to the partners' websites, fill in the registration and download the material, which can make it difficult to access the information.
Website	https://www.totabc.org/research
Contacts	Glenn Mandziuk ceo@totabc.com

Name of the Initiative	France NUMérique (France)
Responsible organization	Ministry of Economy, Finance and Relations - France
Responsible department	General Directorate of Companies (DGE)
Year of creation	2019
Introduction	France NUMérique (or France NUM) is a French government initiative designed to support micro, small and medium-sized businesses in their growth, through a consultation and activation platform of more than 1,500 business advisers across the country.
General objectives	The information and services available at France NUM have as main objective to offer an innovative solution for companies that want to achieve a sustainable digital transformation.
Activities and scope	When accessing the platform, entrepreneurs have a range of services, including data analysis on various commercial activities, separated by French regions and by themes: current affairs, finance, good practices, strategies, innovation, technology, among others. France NUM also offers consultancy services for entrepreneurs and links project promoters/financers with future entrepreneurs.
Data sources	Experts linked to France NUM, official data sources from the French government and from more than 70 partner companies of the initiative.
Strengths and weaknesses	Strengths: the platform offers, in a very simple way, access to services, such as self-diagnostics, setting up action plans, training courses, market data, best practices and even access to financing focused on business digitization. By filling in a simple filter, where the user informs the sector of activity, income range, zip code, and the reason for searching France NUM, entrepreneurs are directed to the contents directly.

Weaknesses: due to the large volume of content, including videos, documents, articles and downloadable databases, the site can only be opened with quality on desktop or notebook computers; all content is in French only. |
| Website | https://www.francenum.gouv.fr/ |
| Contacts | https://www.francenum.gouv.fr/contact |

Name of the Initiative	Valencia Tourism Intelligence System (Spain)
Responsible organization	Visit Valencia Fundation
Responsible department	Department of Statistics / Visit Valencia
Year of creation	1991
Introduction	Visit Valencia is a non-profit foundation, in which the Municipality of Valencia, the Chamber of Commerce, the Feria València and the Valencian Business Confederation participate, together with most of the local companies in the tourism sector.
General objectives	Its objective is the strategic management and promotion of the city of Valencia in the field of tourism, with a professional and transversal approach that combines public and private interests. The Tourist Intelligence System, in particular, aims to contribute, through data, to the 6 pillars that support the activity in the region: sustainable destination with quality of life; profitability; intelligence at the service of tourists, citizens and companies; excellence, hospitality and talent; authenticity and creativity; collaborative governance and shared management.
Activities and scope	Modern platform divided by themes, such as tourist demand, supply and occupation of accommodation facilities, air traffic, as well as tourism performance reports and market information on other competing destinations.
Data sources	Official Spanish government data sources and primary collections carried out by Visit Valencia.
Strengths and weaknesses	Strengths: in addition to the complete offer of data, both with a focus on demand and on tourist services, what stands out in the initiative is a model for calculating the carbon footprint left by tourists visiting the region. Weaknesses: there is a brief need to deepen the analysis, as many of the dashboards do not have any type of document that accompanies them to guide the use of the data in the correct way.
Website	https://fundacion.visitvalencia.com/profesional
Contacts	Jaume Mata, Sustainability Manager, Visit Valencia, jaume.mata@visitvalencia.com

ANNEX V

TRADITIONAL SURVEYS – WORLD TOURISM BAROMETER

Name of the Initiative	World Tourism Barometer
Responsible organization	World Tourism Organization
Responsible Department	Tourism Market Intelligence and Competitiveness Department
Year of creation	2003
Introduction	The UNWTO World Tourism Barometer is a publication of the World Tourism Organization (UNWTO), which monitors short-term tourism trends on a regular basis to provide tourism stakeholders with up-to-date analysis on international tourism.
General objectives	The information is updated several times a year and includes an analysis of the latest data on tourist destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes three times a year a Trust Index based on the UNWTO's Panel of Experts on Tourism survey, which provides an assessment of recent performance and short-term prospects in international tourism.
Activities and scope	Analysis of international tourist arrivals on all continents; analyzes of arrivals of domestic tourists in specific countries selected by the UNWTO to feature in the issue; tourism expert confidence index consulted worldwide for the next 3 months (quarterly editions); statistical tables of tourist arrivals by continent/sub-region.
Data sources	Tourism specialists around the world registered with the UNWTO (consultations carried out by online questionnaire); 159 countries and over 500 affiliate members; tourist arrival data collected from official sources in member countries; International Monetary Fund.
Strengths and weaknesses	Strengths: large capillarity of data and number of participating members, granting the material a considerable degree of reliability; objective analyses, based on easily understandable data and based on official sources; the material has full versions (paid subscription required) and executive summaries (free of charge); Weaknesses: access to the complete material requires a subscription paid in foreign currency (Euro), which can make it difficult for public bodies to acquire non-affiliated entities; the document is available in English only, with the statistical appendix in English, French, Spanish and Russian.
Website	www.e-unwto.org/loi/wtobarometereng
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ANNEX VI
SP 20-30 TOURISM PLAN

By 2020, SETUR's actions had already revealed the strength of tourism in the state of São Paulo. The results, both in terms of GDP, as well as tourists and tax revenue, were growing and above the national average. However, with the Covid-19 pandemic, severe impacts occurred in the sector, with a dramatic reduction in activities. However, with joint efforts of the Government of the State of São Paulo, through SETUR-SP, in partnership with private tourism actors, within the scope of the São Paulo Plan, several mitigating actions, such as the offer of financing, opening protocols, among others, were carried out, helping to face the crisis.

Reality is challenging, and the SP 20-30 TOURISM PLAN is of the size of the challenge. Organized and focused on planning and management, governance and collaboration, intelligence and innovation, regional and local empowerment, and marketing and communication, it is not just about retaking Tourism - but transforming it. It seeks to overcome the obstacles of the past and open a planned path for a new future. A new tourism.

The objectives and goals of the SP 20-30 TOURISM PLAN are related to the increase of tourist flows in the state, the modernization of its management and its intensification in articulation with private companies, the strengthening of financing mechanisms, as well as the creation of innovation ecosystems, both institutional and in tourism products.

Da Barra Farm - São José do Barreiro SP - Photo by Ken Chu - Expressão Studio

Examples already arising from the actions of the SP 20-30 TOURISM PLAN can be seen through the proposition of Politurismo SP, one of the largest innovation hubs in tourism in the world, being implemented in São Paulo, with several national and international actors; creation of tourist districts, a normative framework to facilitate private investments in the state and its tourist facilities; creation of scenic routes, which will transform São Paulo's own infrastructure into a tourist product; transformation of downtown São Paulo, in partnership with the town hall, to become one of the main historical and cultural assets in Latin America; proposition of new lines of financing, together with Desenvolve SP (a state of São Paulo development bank) and the Inter-American Development Bank (IDB); restructuring of FUMTUR (the Municipal Tourism Fund of the Federal Government) to streamline investments in resorts and municipalities of tourist interest in São Paulo; creation of the Center of Intelligence of Tourism Economics in the State of São Paulo (CITE) to monitor the sector's activities and help with evidence-based policy proposals; among others.

The SP 20-30 TOURISM PLAN establishes the path for the state to become an increasingly competitive tourist destination nationally and internationally, diversified, technological and innovative, contributing decisively to the formation of a new image for Brazil.

1. CONTEXT

Tourism is one of the most vibrant, dynamic and relevant economic sectors of the 21st century. Data from the World Tourism Organization - UNWTO show that tourism activities present one of the fields with the highest economic growth rates in the world, with significant impacts on trade, employment, income, social promotion, sustainability and investments, becoming one of the main engines of contemporary economic development in countries.

This is due to the transversality and externalities that activities in the tourism value chain have, and promote, in national and international economies. In the trade of goods, for example, transactions between countries of intermediate and final goods demanded by the tourism chain have become one of the main categories, as is the case in the trade of services.

Its activities are also one of the largest employers, characterized by being labor intensive and demanding both young and elderly profiles and with gender diversity. Furthermore, the demand for work in the tourism sector has a multiplier effect on other sectors: it is estimated that tourism and its related activities account for 1 in every 10 jobs in the world (UNWTO, 2019).

With regard to investments, tourism induces investments in infrastructure - many of which are even associated with improvements that impact environmental preservation and are in line with the Sustainable Development Goals (SDGs).

It is precisely from these economic characteristics, which encompass the new context of the Fourth Industrial Revolution, in which individuals have more information, interests and, at times, availability and propensity for tourism, that this sector became the object of focused public policies in sustainable development.

Public policies for tourism are designed with the objective of articulating stakeholders to build governance aimed at providing competitiveness and sustainability to the activities of the tourism value chain at a subnational level. According to the World Tourism Organization (2019, p.26), competitiveness in tourism means:

"the destination's ability to efficiently use its natural, cultural, human, artificial and capital resources to develop and provide quality, innovative, ethical and attractive tourism products and services, in order to achieve sustainable growth within its overall vision and strategic objectives, increase the value of the tourism sector, improve and diversify its market components and optimize its attractiveness and benefits, both for visitors and the local community, in a sustainable way."

In this context, the state of São Paulo stands out. Not only because it has a rich variety of destinations and tourist facilities, as well as a relevant transport and communication infrastructure, which makes it one of the main destinations in Brazil, but notably, because the State Government, through its Tourism Secretariat, considers tourism an essential vector for the socioeconomic and sustainable development of the state, being a priority dimension for gains in competitiveness.

2. NUMBERS

The numbers from São Paulo reveal the rise of tourism in the State.

In 2019, the GDP of tourism in São Paulo reached more than R$ 222.3 billion (CITE - SETUR-SP, 2020), generating more than 50,000 direct jobs (CITE - SETUR-SP / CAGED - General Register of Employed and Unemployed Persons of the Ministry of Labor, 2020).

For comparative purposes, while tourism in the state of São Paulo grew by 5.3% in 2019, that of Brazil, for the same period, registered an increase of 2.3%. São Paulo grew more than twice as much as the country.

Despite the good prospects and the activities that were being developed for the year 2020, the entire growth trajectory was drastically affected by Covid-19. The effects of the new Coronavirus pandemic have been substantial worldwide. The humanitarian and health crisis, added to the economic downturns, constitute a scenario of uncertainties and immediate losses - which, due to the virus' contamination characteristics, brutally and in a short period of time affected the entire tourism chain and activities.

Thus, SETUR mobilized itself on two fronts: i) supporting tourism at a critical moment in view of the crisis generated by Covid-19 and, also, imperatively, ii) strategically reflecting and planning its activities for a new future. That is, to think about ways and actions which, while protecting tourism during the crisis, reorganize and promote the dawn of its economic, social, cultural and sustainable strength, with room for growth and competitiveness of its economic agents, as well as attractiveness and safety to tourists, preparing people for a new future.

As part of these efforts, SETUR prepared its SP 20-30 TOURISM PLAN. A meticulous work, in partnership with several actors of the public power and private initiative, which identifies trends and scenarios that guide the elaboration of strategic guidelines, through the definition of objectives and initiatives that will recover and strengthen tourism in the state of São Paulo for the next 10 years and are aligned with the 2030 Agenda and the Sustainable Development Goals (SDGs) of the United Nations (UN).

Berrini Avenue - São Paulo SP - Photo by Ken Chu - Expressão Studio

3. PREPARATION OF THE SP 20-30 TOURISM PLAN

The planning techniques used by SETUR to formulate the SP 20-30 TOURISM PLAN were monitored by the Administration Institute Fundation - FIA. For its realization, the Prospective Planning method was used (Godet, 1997; Heijden, 2005; and Schwartz, 2000). Its objective is to support strategic decision-making in organizations through a process of observation and analysis of trends in the environment, possible future scenarios and the generation of long-term strategies.

Forward planning is useful for any public organization that sees the need to develop strategies to guide its lines of action in the short, medium and long term. Additionally, the Situational Strategic Planning – PES (Matus, 1997) method was used.

The PES is a planning technique for the public sector based on the selection and explanation of problems from the situational perspective of a social actor, in order to design short and medium-term action strategies; that is, for the period of government.

While Prospective Planning explores and analyzes the future, in order to understand the major trends that are taking place in the world and that are transforming the field of interest that one wishes to plan for the long term, and thus understand the range of possible future scenarios, PES analyzes current problems from the perspective of a specific social actor. The two methods complemente each other and combine to build the necessary action strategies for short, medium and long-term planning.

In order for the formulation of the SP 20-30 TOURISM PLAN to be dynamic and innovative, SETUR, accompanied by the FIA, promoted a process of collaborative construction with the active participation of SETUR servers and collaborators and various tourism actors in the public sector and private initiative, generating ample space for debate and consensus building.

First, the Plan Group was created, consisting of SETUR employees and representatives of AMITESP - Association of Municipalities of Tourist Interest in the State of São Paulo, APRECESP - Association of Resort Type Municipalities of the State of São Paulo, and the tourism value chain. The Group held systematic meetings from March 2020, aiming to discuss the trends and impacting scenarios of tourism in the state; analyze the problems in tourism; design the guidelines and strategic objectives; and elaborate the Plan's strategies.

Secondly, SETUR carried out a survey with the tourist municipalities in the state, with the aim of finding out about their main problems, future perspectives for tourism and the actions that are being implemented.

Finally, in order to promote reflection among sector actors about the future of tourism in the state, several virtual workshops were held in May and June 2020 with interlocutors from the 49 Tourist Regions, AMITESP, APRECESP, the value chain of tourism, the Management Council, state agencies, councilors of CONTURESP - São Paulo State Tourism Council, and employees and collaborators of the São Paulo State Travel and Tourism Secretariat. The results of all the workshops were processed and analyzed by FIA, presented and discussed with the Plan Group to finally become a fundamental input to feed the preparation of the SP 20-30 TOURISM PLAN.

PLANO DE TURISMO SP 2030

4. CURRENT TOURISM RADAR

4.1 Economy

- Increased volatility in the economic sphere poses difficulties for decision-making on investment, consumption and resource allocation in general.
- China's repositioning in the global value chain: impact on tourism demand by the Chinese and Asian middle classes in general.
- Uncertainties regarding the Brazilian economic recovery capacity: revision of expectations regarding the previously expected cyclical recovery.
- Uncertainties about the resilience of the economic dimension of tourism.
- Abrupt drop in international demand for tourism.
- Increased regional inequalities should improve the relative position of the state of São Paulo.
- The state of São Paulo is still the dynamic axis of the national economy and has implemented actions to mitigate the perverse effects of the economic dimension of the Covid -19 pandemic.
- With a more competitive and diversified global environment, tourists are more aware of the cost-benefit ratio of destinations, as well as elements related to infrastructure and security, which increases international competitiveness.
- There is a shortage of human resources with the necessary skills to deal with the demands of the tourism sector.

4.2 Health Safety

- Security will be the new ascending value of the post COVID-19 virus stage, a sine-qua-non condition for the choice of destinations.
- The definition of protocols and quality standards for the offer prevails, as unsafe tourism is a risk for both tourists and the host community.
- Strong impact on tourist models that presuppose agglomerations of travelers.
- Uncrowded destinations, with enjoyment of nature, rural accommodation and outdoor activities prevail.
- At airports, social distancing and measures to avoid crowds, disinfection and temperature control are implemented.
- Adaptation of the tourism offer, adapting to new health safety protocols.
- Adoption, if necessary, of quarantine policies, for two weeks, for people of certain origins who enter its borders.
- Trend of preference for local and proximity tourism, targeting destinations that offer good security measures.
- More rigorous and prudent tourist, always taking into account safety and hygiene measures.
- Integration and coordination with health agencies.

4.3 Information and Communication Technology (ICT)

- Smart, connected, interactive, authentic and sustainable tourist destinations, prepared to meet all stages of the journey of the connected tourist. Increased innovation and competitive intelligence: new products and services.
- Intensification of the trend of digitizing the offer of services and products through the use of ICT – Information and Communication Technology: reservations, management, marketing, communication with the customer.
- Platform and shared economy definitely impact business tourism in the medium and long term.
- New technologies offer tourists greater control in travel planning. There is an increasingly connected tourist, experiencing and enjoying tourism with the help of a cell phone or connected devices.
- Increased concern of individuals and companies with the management of user data in ICT.

4.4 Sustainability

- Climate change and soil, water and air pollution are a threat to the environment and impact the conditions of tourism offer.
- The relevance of the environmental agenda continues to grow.
- The health crisis weakens the mass tourism model, which relieves environmental pressure.
- Brazil has great potential to develop, based on valuing and producing knowledge from its natural resources.
- Strengthening the economy and local populations by stimulating tourism activities.

4.5 Demography and Culture

- Health security is part of the culture and customs of both tourists and host communities.
- Health security becomes a strong argument for the narrative of "tourismphobia"
- With the increase in global life expectancy, together with the decrease in the growth rate, the world population has been in an aging process in the last decades.
- Crisis impacts the global middle class, affecting the tourism economy.
- New generations have different expectations and needs than previous generations, demanding more connected and interactive tourist experiences.
- Demand for personalized services, products and experiences.

4.6 Regulation

- Greater restrictions in international and national people mobility legislation.
- Greater regulations on national and international mobility and migration.
- Increased regulations regarding the concentration of people in the same space.
- Greater regulation of platform economy business models that act on and impact tourism.

5. THE CHALLENGES FOR TOURISM IN THE STATE

The crisis caused by the Covid-19 pandemic demands that SETUR-SP be able to expand its planning and strategic management capacity, in order to face the high complexity of the problems generated for tourism. But this is a process that must be articulated and coordinated with the actors in the tourism value chain, in order to direct and guide the actions of municipalities and tourism segments towards overcoming the crisis.

Knowing how to act in such a complex and challenging context is decisive for tourism to become a vector of local and regional development, also after the pandemic. This requires the restructuring of tourism products and services, with health security as the focus, as well as rebuilding the confidence and sense of security of tourists.

In order to be able to overcome the challenges not only arising from this unprecedented crisis, but also from structural problems that have been faced since the past, it is necessary to make tourism governance in the state more participatory and collaborative.

As it is a context without precedents, with strong social and economic pressures and costs, the actions of the different actors in tourism must be coordinated, integrated and with a strategic vision. Only in this way will it be possible to mitigate the effects of the crisis, enabling the resumption of activities. Dialogue with the productive and business sectors is a fundamental element in this process, to prepare the offer in relation to new health safety protocols and practices, adapting their capacities, practices, equipment and calendars.

Making the necessary changes to enable this participatory and collaborative governance is a challenge in itself. Therefore, it is essential to adapt and modify different systems that structure tourism in the state of São Paulo, such as financing, cooperation, strategic planning, monitoring and evaluation systems, as well as increasing the responsiveness of organizational processes in public entities and authorities, as well as those of the private sector.

In addition to a more participative and collaborative management in the process of tourism recovery, adjustments are also needed in the macro organizational rules that define the Secretariat's mission and organizational structure, enabling an increase in its capacity in the promotion and development of tourism, facing the challenges, current and future, brought about by the crisis.

Another topic of great relevance is the articulation and integration of knowledge with innovation and entrepreneurship generated by the various actors that operate in the tourist scene in the state of São Paulo, in order to support and establish a strategic system aimed at the development of tourism.

Thus, it is necessary to stimulate the development and incorporation of new technologies, encourage entrepreneurship and implement strategies that combine intelligence and innovation with the qualification of tourism offering, ensuring the development of smarter destinations that are present in digital media.

Many areas in the state of São Paulo have a vocation for tourism activities, but they are underutilized, as well as several locations that are already tourist destinations, but that require improvement.

Regional and local strengthening is very important for the structural improvement of tourism and for the economic and social recovery after the impacts caused by the Covid-19 crisis, and the articulation of public and private actors is imperative in this process.

To transform the current reality, it is imperative to develop and improve public health and transport services, internet access and environmental protection, as well as improve tourism products, services and equipment, encouraging the participation of the private sector.

To overcome the challenges related to regional and local potential, a look at municipal administrations is essential.

Encouraging and investing in the increase of institutional and financial capacities of municipalities allows them to be better able to face the challenges generated by the effects of the pandemic, promoting the resumption of local and regional tourism in a planned and coordinated way in the medium and long term.

Guiding and articulating the promotion, positioning and communication of tourist destinations, products and services in the state of São Paulo has great relevance for the resumption of tourism activities after the stoppage imposed by the pandemic. A promotion focused on safety, using smart and innovative marketing strategies is essential, but very challenging. A positive and purposeful agenda is needed, positioning the state of São Paulo and its various destinations as safe, competitive, innovative and receptive.

Finally, the marketing of tourist destinations must be based on market intelligence, optimizing the use of the offer according to trends and behavior of tourist demand. The use of digital marketing is a prerequisite for adapting tourism in the state to the current competitive scenario.

With the impact of the Covid-19 pandemic, the virtual environment received even more importance, so that being disconnected from digital networks is not an option for destinations that aspire to performance outstandingly. Thus, the integration between websites, social networks, digital platforms and traditional media channels is as important as the qualification of tourism offering for the use of digital media, which is essential.

It is also beneficial to carry out a promotion based on a new way of structuring tourist experiences, products and services, valuing regional and municipal destinations, with a strong tourist brand in the state of São Paulo.

6. PRINCIPLES AND STRATEGIC VISION

Innovation

Incorporation of innovation through the dissemination of knowledge, new technologies and development of talent in the tourism value chain, providing unique experiences arising from quality tourism products and services that boost the competitiveness of destinations in the state of São Paulo facing regional, national and international markets.

Competitiveness

Focus on the quality of destinations by creating and increasing the added value of the tourism products, equipment and services offered, aiming at the constant search for its best performance, generation of new business and market positioning, as well as its economic sustainability and generation of employment and income.

Safety

Healthy, responsible and safe tourism, promoting prevention, surveillance and control measures, respecting the sanitary protocols established for each specific sector, as well as preserving not only the physical integrity and well-being of visitors but also of residents and workers

Sustainability

Positioning tourism as an ecologically correct, socially just, economically viable and culturally diverse economic activity.

Inspiration

Tourist destinations in the state of São Paulo that provide inspiring, creative and unique experiences that encourage visitors.

Inclusion and Accessibility

Barrier-free tourism activity that ensures the inclusion and accessibility of people across the supply and demand of tourist destinations in the state of São Paulo.

Vision for the State of São Paulo

To be one of the most desired tourist destinations nationally and internationally, diversified, technological, innovative and competitive, contributing decisively to the formation of a new image for Brazil.

7. STRATEGIC GUIDELINES

Strategic objectives

1. Improve SETUR's planning and management capacity in the articulation and coordination of actors in the state's tourism value chain, considering the post-Covid recovery strategy.

2. Improve SETUR's institutional, operational and financial management capacity.

3. Institutionalize, strengthen and enhance local and regional governance bodies related to tourism planning, financing and management.

4. Strengthen the capacity for articulation and coordination between the government, the private sector and civil society for the development and competitiveness of tourism activities, considering the inclusion and equity of gender, race and the sexual diversity.

5. Strengthen investment and financing policies for public and private programs, projects and enterprises aimed at the development of tourism in the state of São Paulo.

6. Promote the production, incorporation and dissemination of knowledge, innovation and new businesses in the value chain of tourism in the state of São Paulo.

7. Promote the articulated action of public and private agents in the implementation of national or international tourism enterprises and products, which take advantage of the vocations and potential of the municipalities and regions of the state of São Paulo.

8. Modernize and expand marketing and communication strategies for tourist destinations, products and services offered in the State of São Paulo at the municipal, regional, national and international levels.

STRATEGIES

GUIDELINE I - RESUMPTION PLANNING AND MANAGEMENT

Strategic Objective 1

Improve SETUR's planning and management capacity in the articulation and coordination of actors in the state's tourism value chain, considering the post-Covid recovery strategy.

2022 goal

Bold scenario: Improve SETUR's institutional, operational and financial management capacity

Strategies

1. Design and implementation of a coordinated and monitored strategy for the opening and resumption of tourism in the state of São Paulo, paralyzed by the crisis caused by the Covid-19 pandemic.

2. Design and implementation of motivational communication campaigns aimed at presenting São Paulo as a safe, healthy and welcoming destination for tourists.

3. Design and implementation of an articulated strategy for the strengthening of fiscal measures, financing and other supports aimed at the recovery and development of tourism.

GUIDELINE II - PARTICIPATORY AND COLLABORATIVE GOVERNANCE

Strategic objective 2

Improve SETUR's institutional, operational and financial management capacity.

2030 goal

Bold scenario: A modernized and flexible SETUR that responds to the demands of tourism. With the new units implemented and fully operational, and a stable technical staff.

Strategies

4. Institutional modernization of SETUR in terms of its mission, competences and organizational structure.

5. Design and implementation of the Strategic Center for Tourism Development of the State of São Paulo.

6. Modernization, adequacy and efficiency of SETUR's organizational processes, focusing on digital strategies.

Strategic objective 3

Institutionalize, strengthen and enhance local and regional governance bodies related to tourism planning, financing and management.

2030 goal

Bold scenario: 100% of Tourism Regions structured and implemented with management autonomy. Regional tourism boosted with the effective participation of the private sector, with an increase in the tourist flow and national recognition of São Paulo destinations.

Strategies

7. Construction of the state tourism regionalization policy based on the guidelines of the national tourism regionalization program.

8. Stimulus for the elaboration, revision and implementation of regional master plans for tourism (PDTUR - Tourism Master Plan).

9. Encouragement of institutional modernization of municipal administrations to promote tourism development in the state's municipalities.

Strategic objective 4

Strengthen the capacity for articulation and coordination between the government, the private sector and civil society for the development and competitiveness of tourism activities, considering the inclusion and equity of gender, race and sexual diversity.

2030 goal

Bold scenario: SETUR's strategic actions and projects with an impact on tourism development implemented with the effective participation of public, private and civil society actors.

Strategies

10. Strengthening of an inter-institutional agenda aimed at consolidating tourism as a strategic development factor.

11. Strengthening and valuing CONTURESP (State Tourism Council), Regional and Municipal Tourism Councils.

12. Encouraging inclusion and accessibility projects in tourist destinations in the state.

Strategic objective 5

Strengthen investment and financing policies for public and private programs, projects and enterprises aimed at the development of tourism in the State of São Paulo.

2030 goal

Bold scenario: Tourist credit programs with expanded access and multiplied resources for tourism projects and enterprises. Until 2022, investment of R$ 3 billion in financing investment projects and working capital.

Strategies

13. Modernization and promotion of financing and investment strategies in tourism with public and private, national and international organizations.

14. Restructuring of State Law No. 16,283 of 07/15/16 which provides for the Tourism Municipalities Improvement Fund for the development of programs for environmental improvement and preservation, urbanization, tourism services and equipment (FUMTUR - Municipal Tourism Fund of the Federal Government).

GUIDELINE III - INTELLIGENCE AND INNOVATION

Strategic objective 6

Promote the production, incorporation and dissemination of knowledge, innovation and new businesses in the value chain of tourism in the state of São Paulo

2030 goal

Bold scenario: Politourism, with R$ 1.2 billion in investment, and CITE are a reference in tourism intelligence in the world. Disseminated and integrated intelligence networks and centers for promoting and fostering teaching, research and innovation in tourism, operating in the state in partnership with public and private entities.

Strategies

15. Support for sustainable development and the implementation of the Polytourism Strategic Project.

16. Strengthening of CITE – Center of Intelligence of Tourism Economics in the State of São Paulo.

17. Encouraging the modernization and strengthening of awareness, training and professional qualification programs in the area of tourism.

18. Implementation and maintenance of intelligence and innovation networks aimed at destinations, ventures and new businesses in the tourism value chain.

GUIDELINE IV – REGIONAL AND LOCAL STRENGTHENING

Strategic objective 7

Promote the articulated action of public and private agents in the implementation of national or international tourism enterprises and products, which take advantage of the vocations and potential of the municipalities and regions of the state of São Paulo.

2030 goal

Bold scenario: Tourist districts implemented in the state, with an investment of R$ 15 billion. The Center Project, with an investment of R$15 billion, and a real estate appreciation of R$80 billion. Touristic Municipalities, Municipalities of Touristic Interest and Tourist Destinations expanded, integrated and acting in a regionalized way, enhancing its attractiveness. Growth of domestic and international tourist flow.

Strategies

20. Promotion and support for the creation of the Strategic Project for Tourist Districts in territorial areas of the State with a vocation for the economic activity of tourism.

21. Promotion and support for the implementation of the Strategic Project for the City Center of São Paulo.

22. Encouragement of infrastructure, services and tourism equipment projects for the sustainable development of the state's municipalities and tourist regions.

23. Increase and development of mobility and connectivity actions in the different modals of transportation.

24. Encouragement and enhancement of initiatives that strengthen the local and regional identity of tourist destinations.

GUIDELINE V - MARKETING AND COMMUNICATION

Strategic objective 8

Modernize and expand marketing and communication strategies for tourist destinations, products and services offered in the state of São Paulo at the municipal, regional, national and international levels.

2030 goal

Bold scenario: Expand the tourist flow of business trips and events. 50% growth in receptive tourist flow in leisure trips. 50% growth in international tourist demand. Growth in the number of trips, itineraries and tourist products in São Paulo. Consistent and stable presence of the state as a destination in digital communication channels. Consolidation of the Brand and Tourist Identity of the State of São Paulo. Tourism GDP growth of more than 5% by 2022. Economy and Tourism Volume Growth. 15% growth in the number of jobs in Tourism Characteristic Activities by 2030.

Strategies

25. Strengthening, institutionalizing and promoting the SP FOR ALL initiative, fostering brand management and its dissemination nationally and internationally.

26. Design and implementation of a tourism promotion program for the State of São Paulo at the municipal and regional levels.

27. Design and implementation of the market intelligence and tourism marketing network.

28. Promotion of digital marketing focused on the traveler experience as a way to boost São Paulo tourism.

29. Incentive and promotion of tourism marketing.

30. Support the promotion and realization of fairs and events on a national and international level.

31. Strengthening of SETUR's communication strategy.

8. MONITORING

The SP 20-30 TOURISM PLAN will have a monitoring methodology that will allow for the monitoring and evaluation of the strategies and the degree of achievement of the defined strategic objectives, in terms of efficiency and effectiveness.

In this way, the Plan will be monitored based on the defined strategic objectives and the commitments assumed by the different groups responsible for the strategies. Monitoring the Plan will be a systematic process that will provide valuable information about its management and the state of progress of its execution, facilitating decision-making to correct deviations from the objectives to be achieved.

A Strategic Center and a Situation Room, allocated at SETUR, will be responsible for organizing and directing the monitoring platform of SP 20-30 TOURISM PLAN. To this end, the Technical Group will develop performance indicators, by which the Plan's degree of progress will be measured, and will keep an updated record of the information obtained and the achievement of goals.

The performance indicators for monitoring and evaluating the Plan should include two dimensions:

• Strategic Indicators, which purpose is to monitor and assess the progress achieved in the Plan's strategic objectives;

• Product Indicators, which are intended to monitor and assess the level of execution and fulfillment of the actions of the Plan's strategies.

The Planning and Monitoring Technical Group will issue regular consolidated reports with strategic information from the Plan to support decision-making by SETUR's Senior Management.

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