

# THE AZORES SUSTAINABLE TOURISM OBSERVATORY (OTA)



OTA's Annual Activity Report (2021-2022) - INSTO Network





# Summary

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Azores Region**

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Azores  
archipelago



# Azores Sustainable Tourism Observatory (OTA)

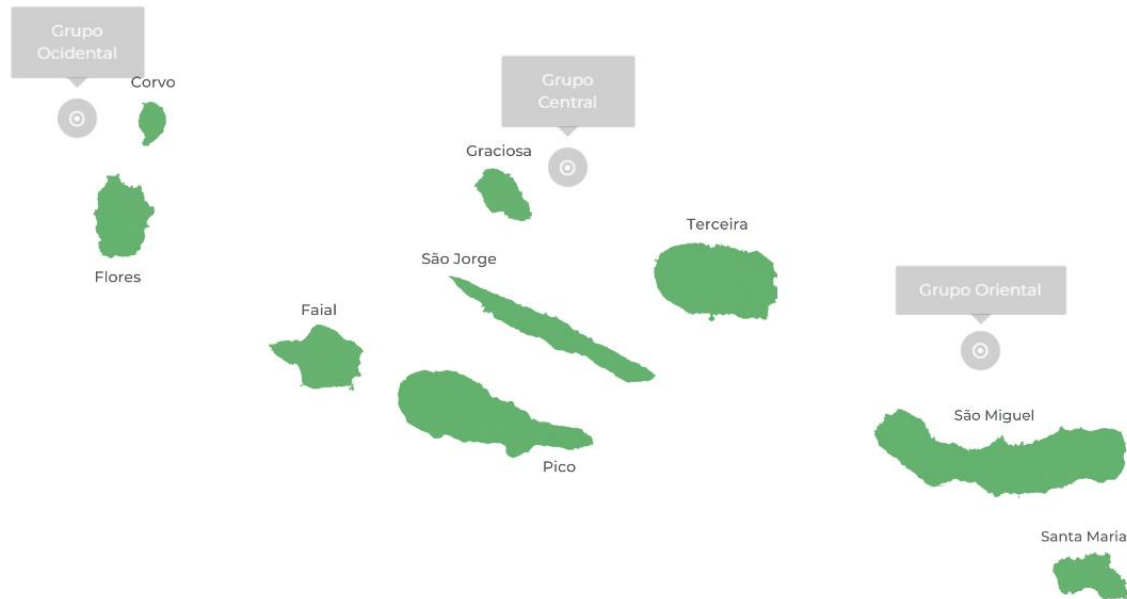
The Azores Sustainable Tourism Observatory (OTA) is a platform that aims to measure and monitor tourism sustainability development in Azores territory. OTA has been a member of INSTO-UNWTO since 2020. The purpose of this second Progress Reports is to provide an overview of the monitoring activities for each issue area, the operations, performance, and lessons identified by OTA during 2021 and 2022 implementation, according to the Rules for the Operation and Management of the UNWTO International Network of Sustainable Tourism Observatories (INSTO). To pursue the objectives, the document begins with an update of the destination profile. Then, an overall description of the current monitoring process is presented, divided into 8 mandatory issue areas: Tourism Seasonality, Employment, Destination Economic Benefits, Local Satisfaction, Energy Management, Water Management, Wastewater Management, and Solid Waste Management. The available tourism-related data is described to allow stakeholders to evaluate the sector's performance. The last section intends to identify ongoing activities which are currently being implemented and forthcoming activities that may be implemented next year.

An underwater photograph showing a large, light-colored whale, possibly a humpback whale, swimming towards the left. A smaller, darker dolphin is swimming parallel to it, also towards the left. The water is clear and blue, with some ripples and light reflections on the surface. A semi-transparent grey box with a dark vertical bar on the left side is overlaid on the right side of the image, containing the text.

# 1. Destination Profile of the Azores Region

# The Azores Archipelago

Azores is an archipelago located in the North Atlantic made up by nine volcanic islands which are divided into three geographical groups that are located along a strip of about 600 kilometers long.



Its geographical situation accentuates the isolation, although all islands are linked by sea and air. In the Azores Autonomous Region (AAR) there are three international airports in Santa Maria, São Miguel and Terceira's islands, two other direct links to the outside of the AAR (namely to Portugal mainland) in Faial and Pico's islands and the remaining four airfields in Graciosa, São Jorge, Flores and Corvo's islands with only interisland links. The Azores, due to its isolation, provoked in part by the difficulties of access, has been maintained over the centuries with a still quite exuberant and poorly polluted nature. Its volcanic origin provides a stunning and unique landscape throughout Europe, making the Azores a highly sought-after destination for rural and nature tourism. The tourism industry has emerged naturally in the autonomous region of the Azores and is considered as one of the pillars of strategic development, since the potential and opportunities of patents in the archipelago are easily usable and sustainable. The characteristics of this territory reinforce the potential of the tourism sector as leverage and motor for economic and social development.

# Economic data and the weight of tourism

Last years, tourism in the Azores has been an increasingly important role in boosting the local economy and increasing the attractiveness of the Region. In 2018, the Azores had approximately 840,000 guests and 2.56 million overnight stays, figures that had never been achieved before. At the same time, the relative contribution of the tourism sector to the Azorean economy also increased: from 6.9% to 8.9% of the total Gross Value Added of companies between 2014 and 2016 (with regard to accommodation, catering and similar companies). This evolution was largely due to the distinctive nature of the destination's tourism offer, based on nature. The positioning of the Azores as a nature destination, both active and contemplative, combined with the complementary nature of nautical, cultural and health and wellness tourism, has strengthened its competitiveness in the tourism market.

In June 2022, the Azores Regional Statistics Office published the main results of the Tourism Satellite Account for the Autonomous Region of the Azores for two main aggregates: Gross Value Added generated by Tourism (GVAGT) and Tourism Consumption in the Economic Territory (TCET), for the years 2016, 2017, 2018 and 2019.

## a) Main results of the Tourism Satellite Account for the Autonomous Region of the Azores.

The Gross Value Added generated by Tourism (GVAGT) is estimated at 409.7 million euros in 2019, amounting to 10.6% of the regional economy's GVA. The activities that contributed most to GVAGT were hotels and similar establishments (39.7%), followed by restaurants and similar (18.8%) and air transport (14.3%).

	2016	2017	2018	2019	2020* (estimate)
<b>GVA generated by tourism (GVAGT)</b>					
<b>Value (thousands of euros)</b>	297 572	335 384	360 638	409 672	106 514
<b>Contribution of GVAGT to the GVA of the Regional Economy (%)</b>	8,6	9,4	9,7	10,6	2,9
<b>Tourism Consumption in the Economic Territory (CTTE)</b>					
<b>Value (thousands of euros)</b>	595 118	706 054	773 858	867 417	X
<b>Weight of Tourism Consumption in the Economic Territory in GDP(%)</b>	15,0	17,2	18,1	19,3	

## b) Employment

The Azores is a region where the tertiary sector is very important and is therefore the main generator of employment. In 2022, around 75% of the employed population in the Azores will work in companies in the tertiary sector, with around 10.3% working in accommodation, catering and similar services.

## c) Main Issuing Markets

The Azores' number one source market is the domestic market. Considering the origin of foreign demand, Germany, the United States, France and Spain represent the Top 4 of all non-resident guests in the Azores.

Year	Germany	USA	France	Spain
2019	90 802	86 109	51 279	48 019
2020	16 060	8 428	7 822	9 186
2021	29 499	18 275	31 325	26 165
2022	89 106	78 643	61 253	51 727

Source: OTA, N° de Hóspedes, 2019 a 2022

## d) Disembarked passengers

In 2019, around 1.7 million passengers disembarked in the Azores archipelago, which represents an increase of 55% compared to 2015. In the pre-pandemic period, there was already an upward trend in the number of passengers disembarking. In 2020, there was a drop of 63% compared to 2019, due to restrictions arising from the COVID-19 pandemic. However, in 2021, this decrease in the number of disembarked air passengers was only 36% compared to 2019, as a result of the easing of some of the travel restrictions implemented during the first year of the pandemic. In 2022, a total of 1.84 million passengers disembarked, an 8% increase on 2019. This is a clear sign of the recovery in tourist activity after one of the worst periods in world tourism.

### e) Maritime Transport - Cruise Ships

In 2019, there were 142 stopovers in the Azores archipelago, with a total of 146,905 transit passengers. There was also a 5% increase in the number of transit passengers compared to 2015. In the last 8 years, the highest number of cruise ships was recorded in 2019 and 2022. In 2022, 200 calls were made, with around 124,000 transit passengers. The months between July and September are those with the lowest number of transit passengers - in 2022 it was 12%. In 2019, the lowest figure was 6%, and around 60% of transit passengers were registered between March and May.



### f) Accommodation, restaurants and rent-a-car

In July 2022, 78 rural tourism establishments and 100 traditional hotels operated in the Azores. This is a decrease of around 3% compared to 2015, mainly due to the decrease in the number of TER (100 in 2015). HT, on the other hand, increased its number of establishments from 84 to 100. Local accommodation grew by around 500% between 2015 and 2022. In December 2022, 3.1 thousand LA were operating in the Azores.

In 2022, 158 rent-a-car companies were registered in the Azores, representing an increase of 22.5% compared to 2016. Regarding the number of restaurants, in 2015 there were around 517.

In 2019, there was a 16% increase, corresponding to 81 more restaurants. In 2021, there were 616 restaurants in the Azores, an increase of 3% compared to 2019.

## Tourist Entertainment

In 2022, around 500 tourist entertainment companies were registered in the Azores, 65% of which are land-based tourist entertainment companies and 35% are dedicated to nautical activities. The island with the most registered tourist entertainment companies is São Miguel, with 55% of land-based tourist entertainment companies and 34% of those dedicated to nautical activities. The islands with the fewest tourist entertainment companies are Corvo (9) and Graciosa (8).

## Tourism Products

The Azores have a solid positioning, having taken on nature as their main tourism product and working on promoting it in a homogeneous and consecutive way. Even when developing complementary products, such as culture and food and wine, the Azores have not taken their focus off the main product, the one that differentiates and affirms them on the international scene.

- Nature Tourism;
- Gastronomy and Wines;
- Sports Tourism;
- Health and Wellness;
- Nautical Tourism.



A scenic landscape featuring rolling green hills, a large blue lake, and a town in the distance under a cloudy sky. The foreground shows a dirt path leading down a grassy slope. A semi-transparent grey box with a dark vertical bar on the left side is overlaid on the right side of the image, containing the text.

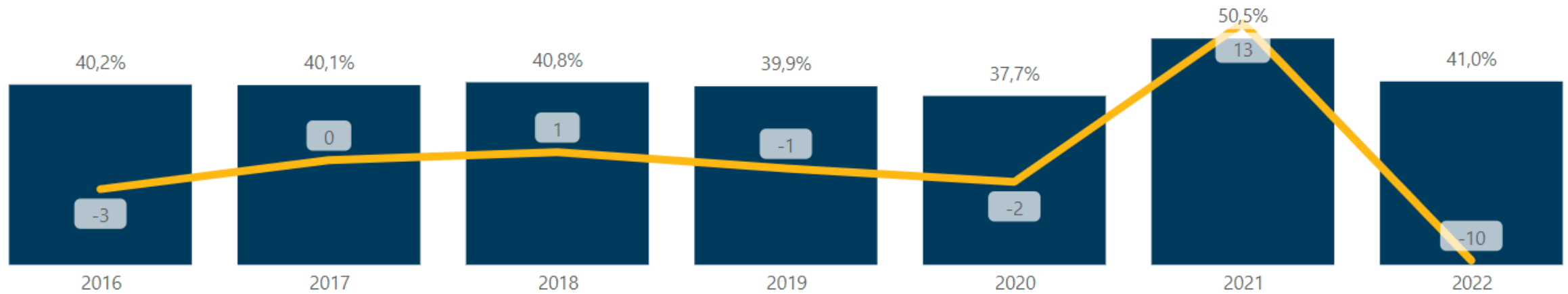
## **2. Process of Monitoring Issues**

# SEASONALITY



# a. Seasonality

Seasonality Rate - Azores



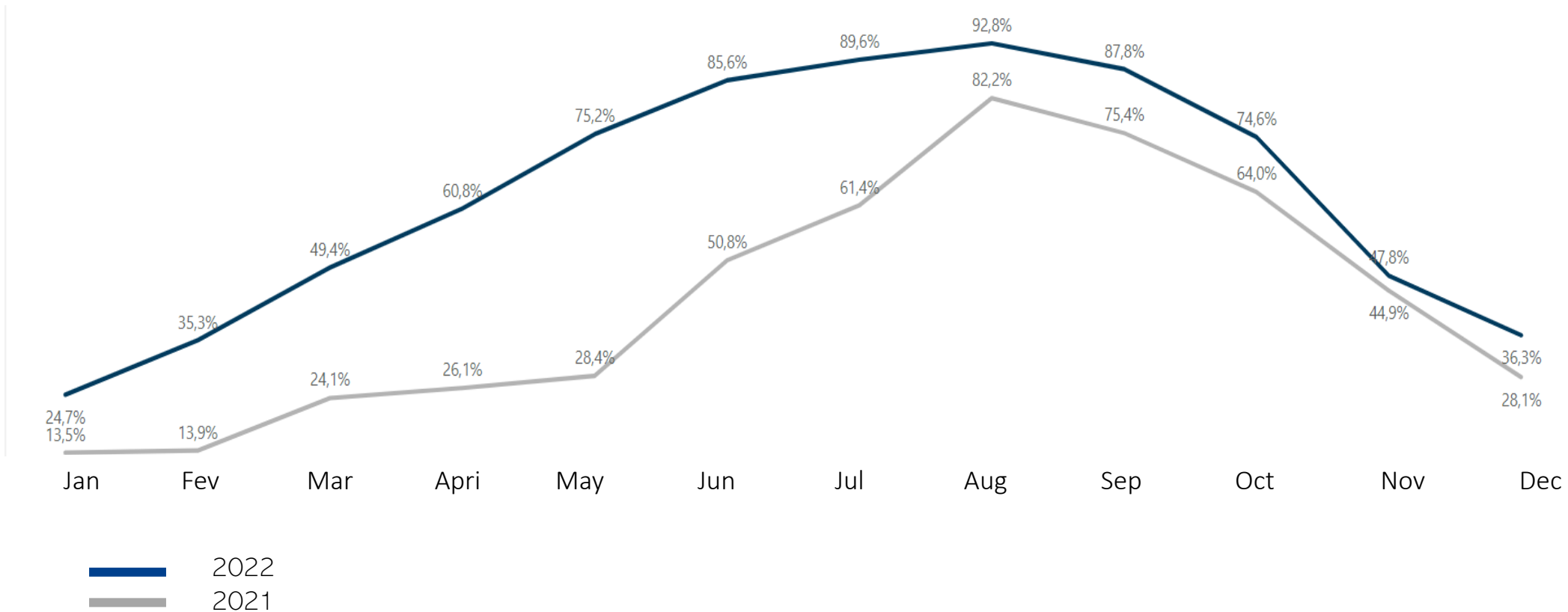
● Seasonality Rate %

— Variation (p.p)

Source: Turismo de Portugal, Travel BI

# a. Seasonality

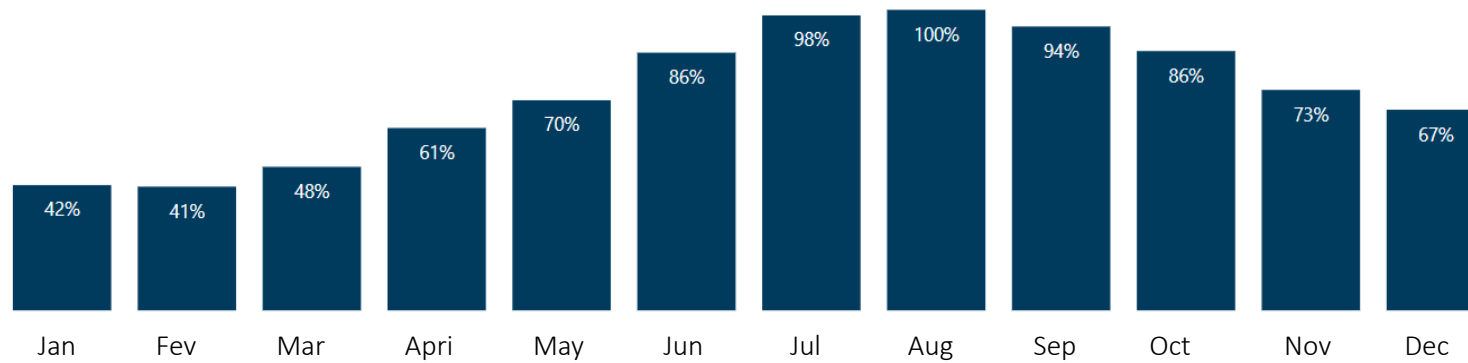
Hotel room occupancy rate (%), per month



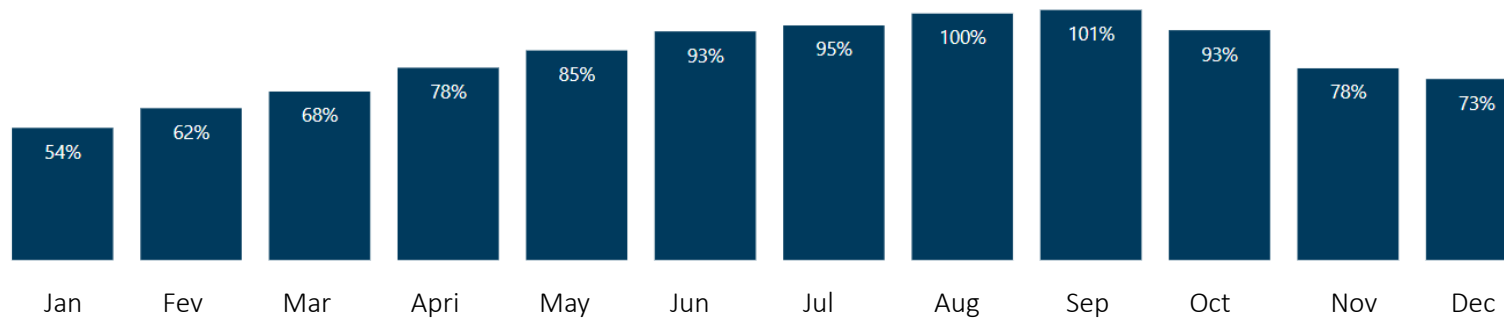
Source: Turismo de Portugal, Travel BI

# a. Seasonality

% of establishments open per month in 2021



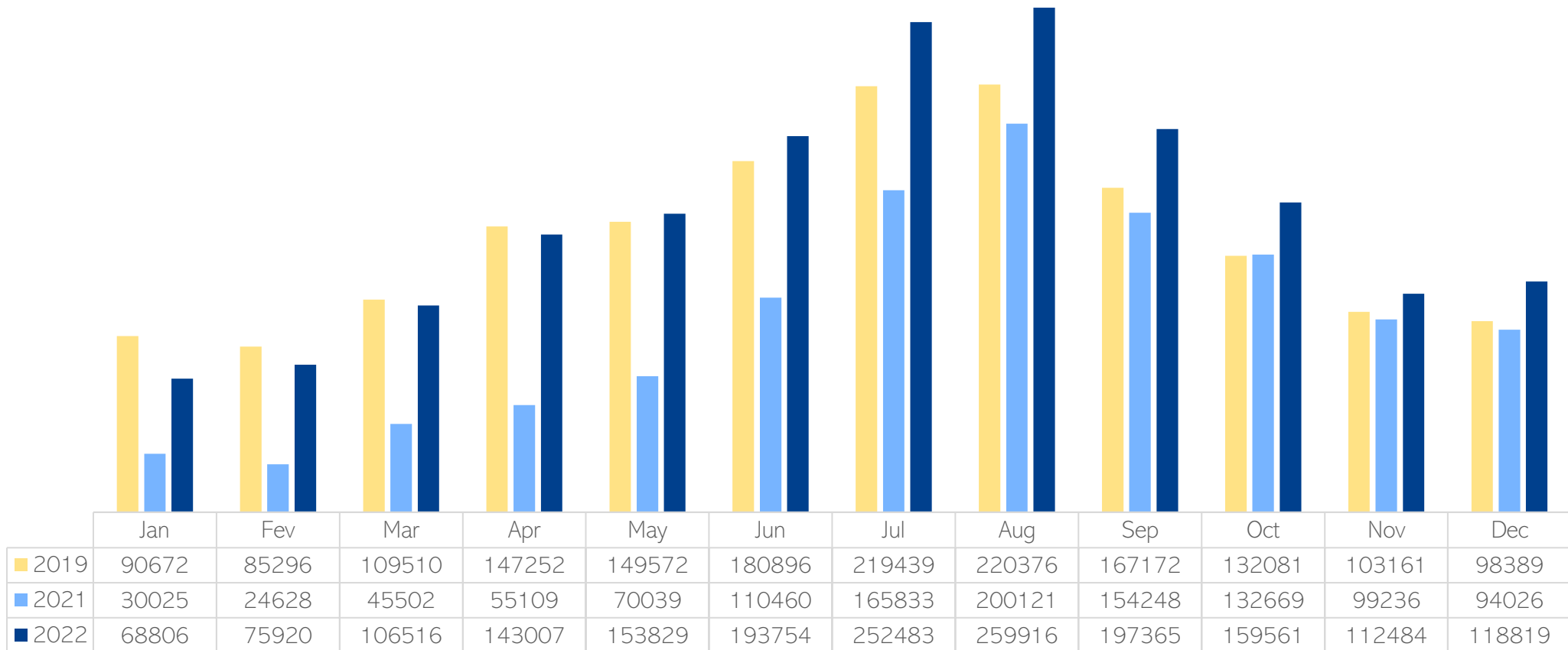
% of establishments open per month in 2022



Source: Turismo de Portugal, Travel BI

# a. Seasonality

No. of passengers disembarked by airlines

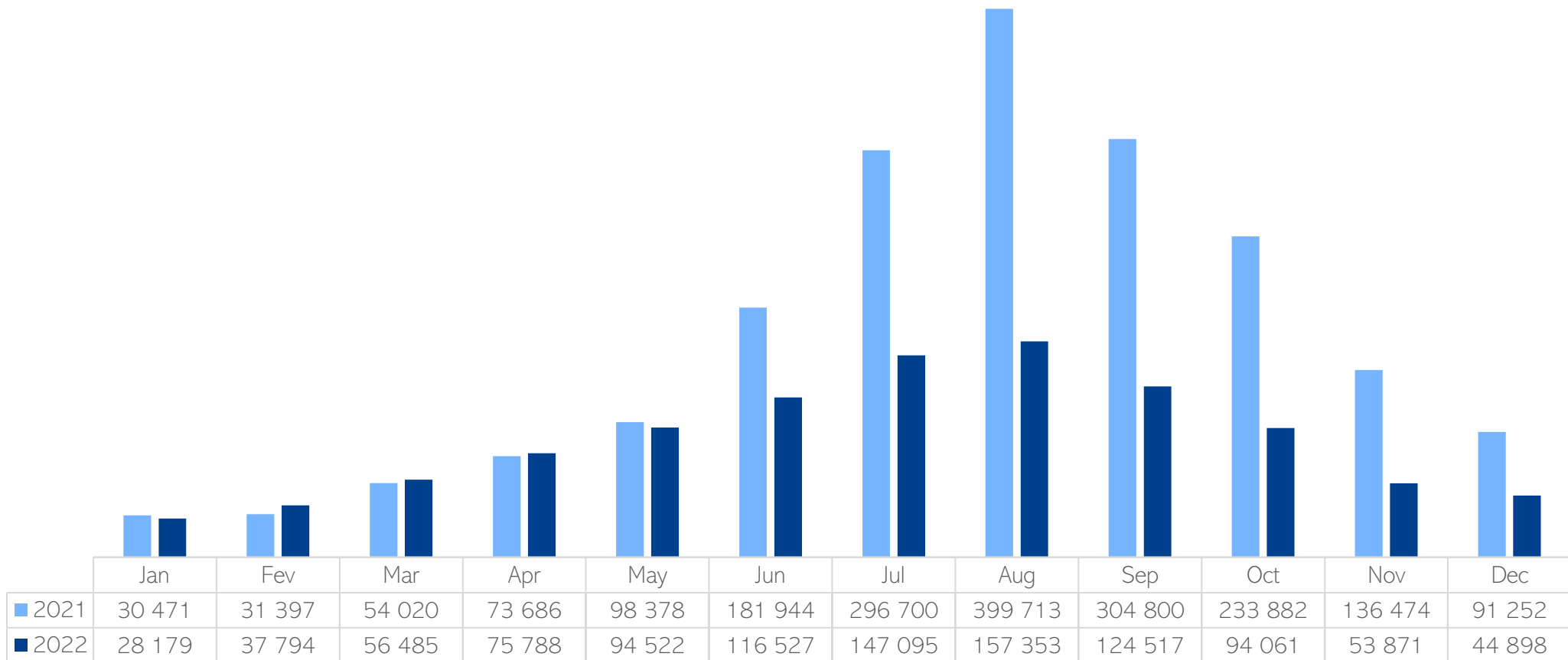


Source: OTA

2019 2021 2022

# a. Seasonality

Number of overnight stays per month, Azores



Source: SREA:OTA

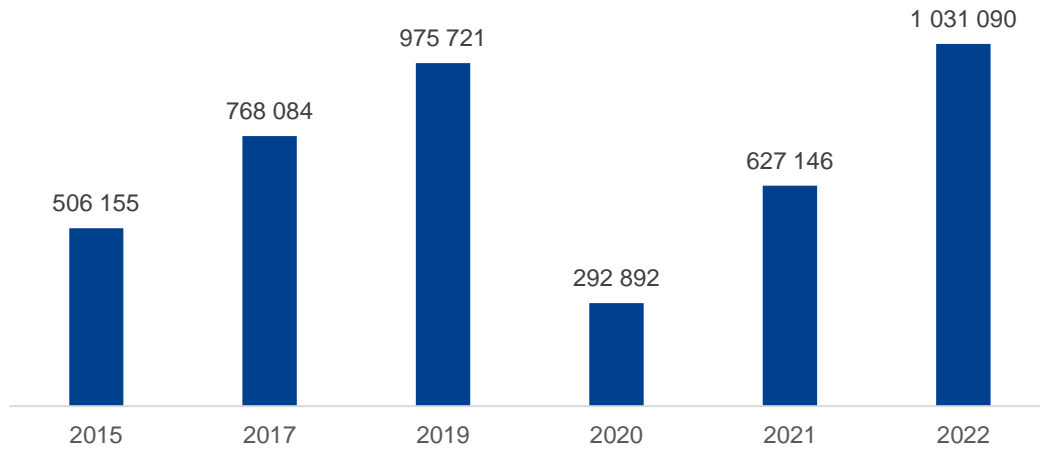
■ 2021 ■ 2022  
17

# ECONOMIC BENEFITS AND EMPLOYMENT

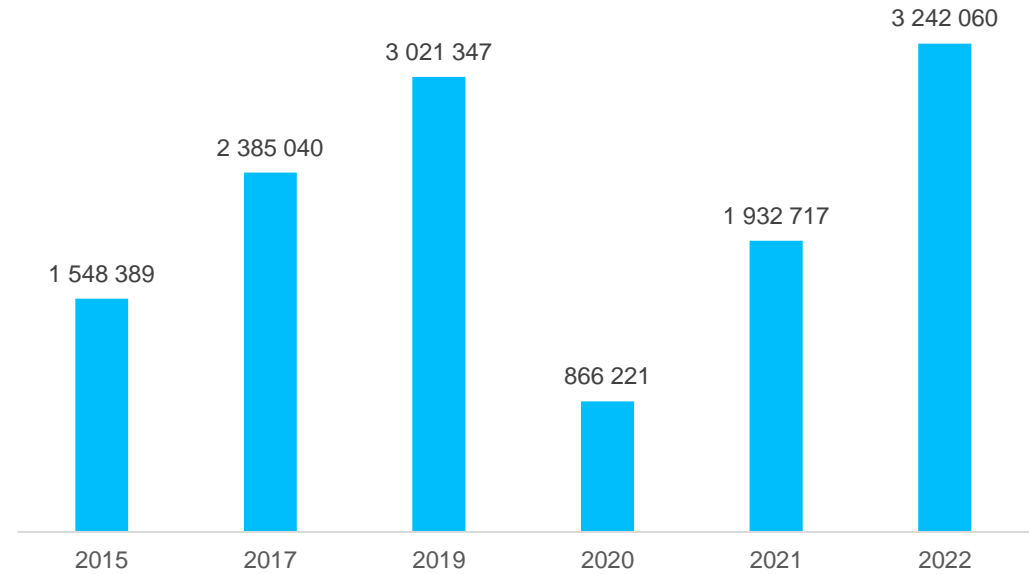


# Economic Benefits

## Number of Guests in Accommodation Units



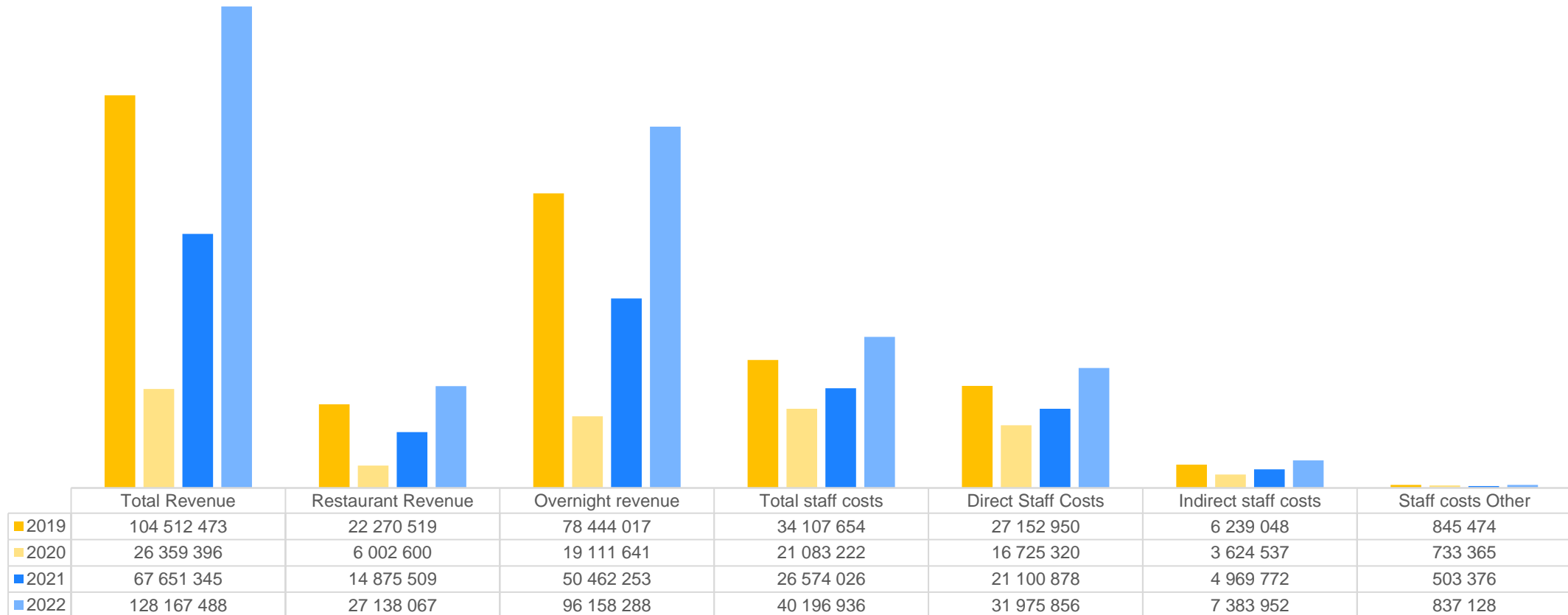
## Number of Overnight Stays in Accommodation Units



Source: OTA

# Economic Benefits

Costs and Income of Hotel Establishments, €



Source: OTA

2019 2020 2021 2022

# Economic Benefits

## Tourists' average spending

	2019	2020	2021	2022
Market with the highest average transaction value	United Kingdom	United Kingdom	Ireland	Ireland
	123,20€	80,80€	206,60€	252,7€

Source: Turismo de Portugal, Travel BI

## Top 5 of the main foreign markets, 2022

Market	% Guests *thousand	Seasonality Rate	Average stay
Portugal	45% (458*)	30%	2,8
Germany	9% (90*)	46%	3,8
USA	8% (80*)	47%	3,5
France	6% (61*)	59%	3,1
Spain	5% (52*)	59%	3,6

## Top markets since 2019

Portugal, Germany, USA, France, Spain

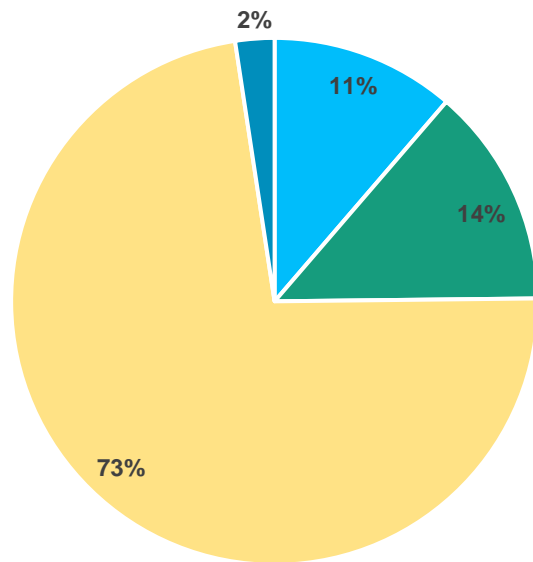


Source: PEMTA 2023

# Economic Benefits

% of Tourist Accommodation, 2015

741 tourist accommodations

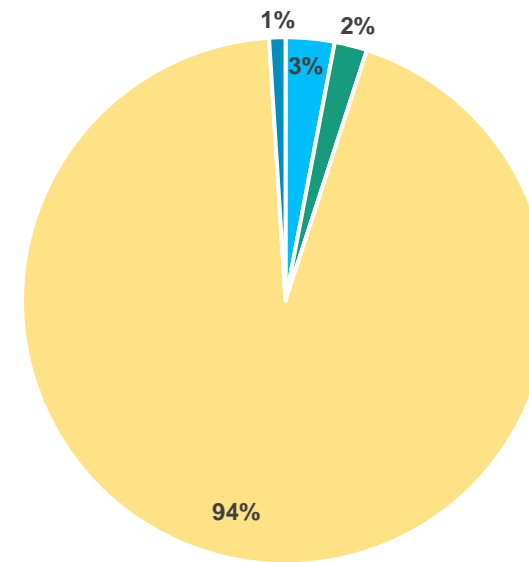


Hotels Rural Tourism Local Accommodation Others

Source: PEMTA 2023

% of Tourist Accommodation, 2022

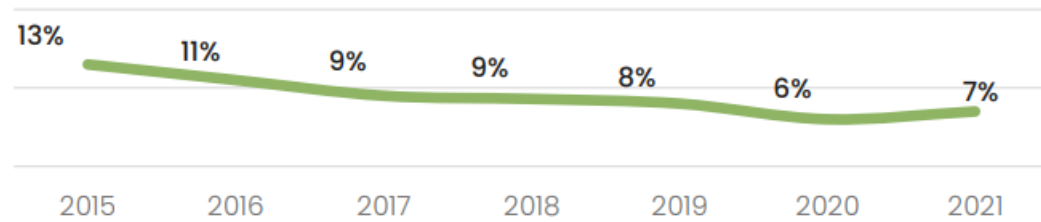
3285 (média anual) tourist accommodations



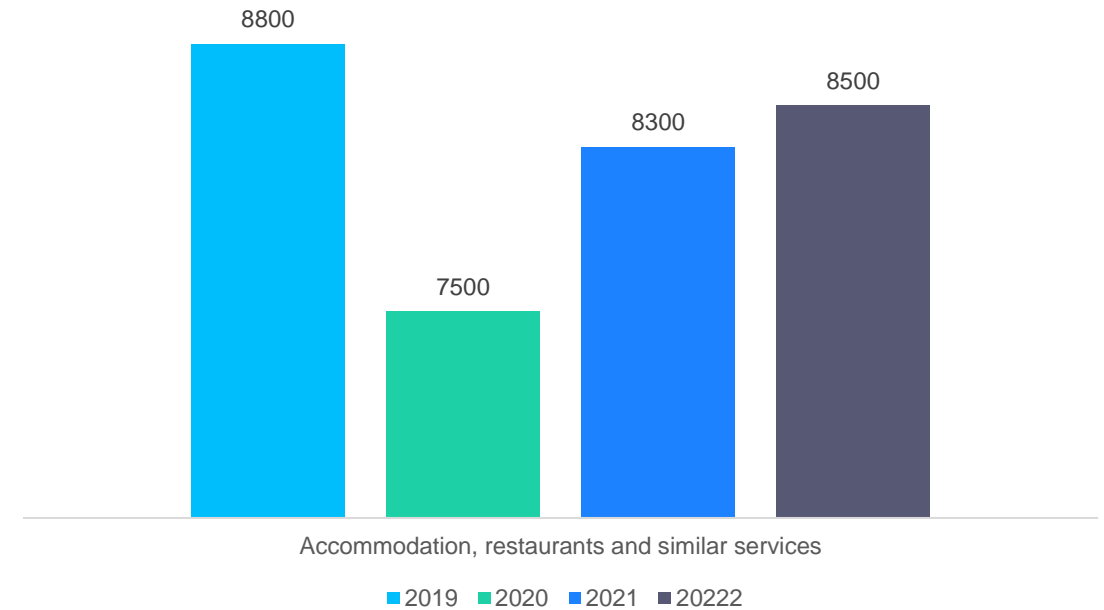
Hotels Rural Tourism Local Accommodation Others

# Employment

Evolution of the unemployment rate, Azores



Total number of employees in the tourism sector, Azores



Employed population in the Azores

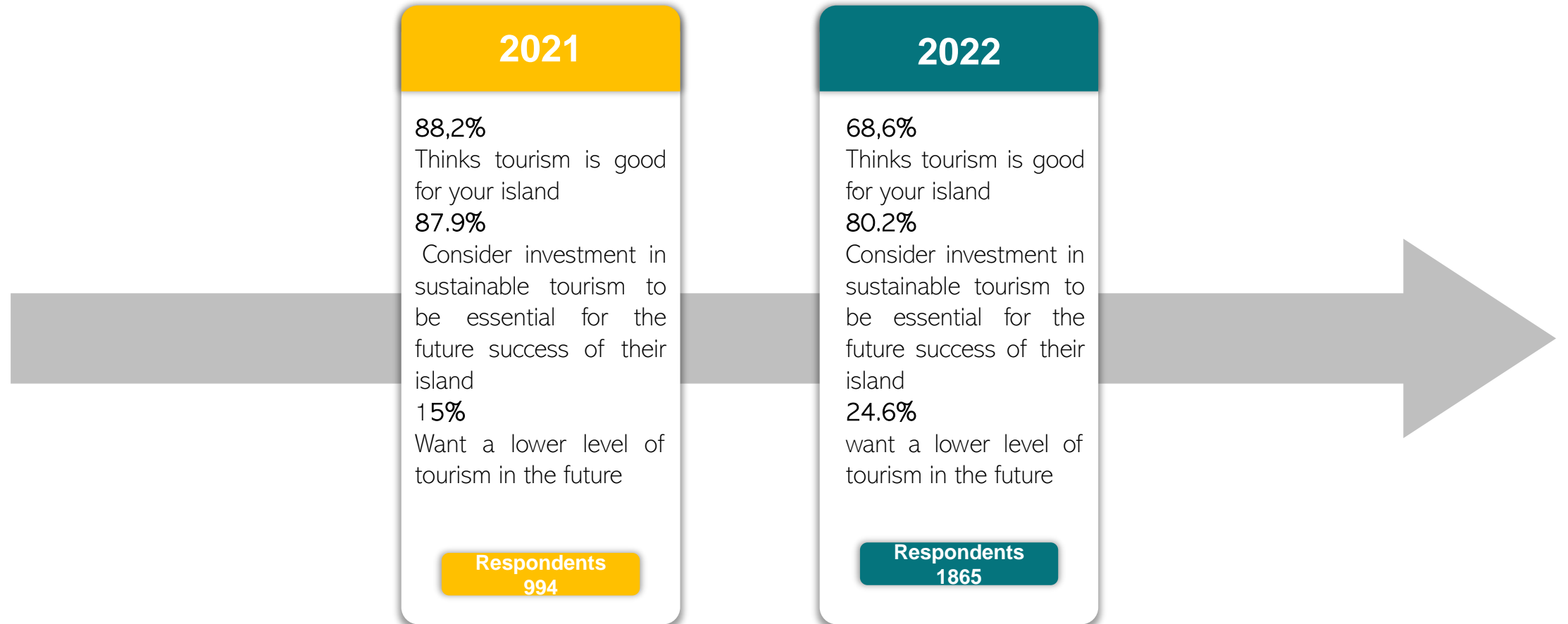
2019	2020	2021	2022
111 530	113 779	111 300	117 100

# LOCAL SATISFACTION



# Local Satisfaction

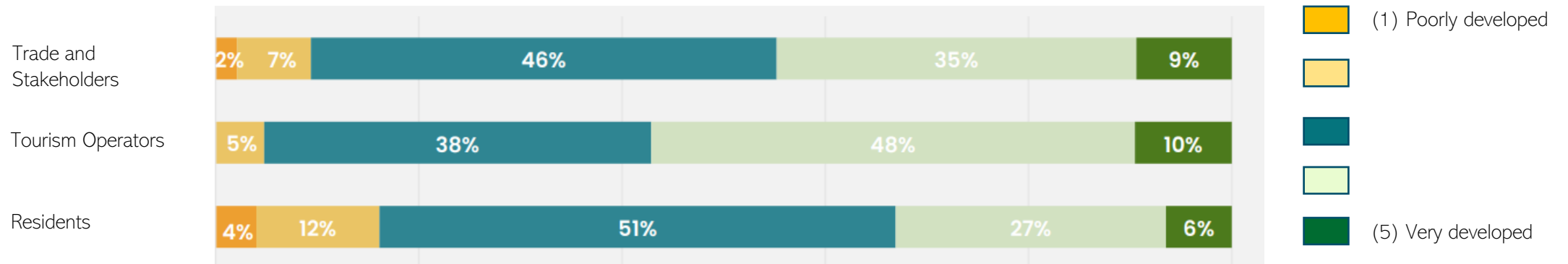
## RESIDENTS



Source: Survey, OTA, "Residents' satisfaction with tourism in the Azores"

# Local Satisfaction

Opinion: Level of Development of Tourism Activity



**44%** of the trade and stakeholders surveyed consider the Azores as a "Developed (4)" or "Very Developed (5)" tourist destination, identifying resources that should be worked on to improve the tourist experience. São Miguel is considered the most developed island in terms of infrastructures to support visitation.

**58%** of the tour operators surveyed consider the Azores as a "Developed (4)" or "Very Developed (5)" tourist destination but indicate that there is great potential for improving the quality of their tourist experience and infrastructure on all the islands (less relevant on São Miguel, where there are more visitor support services).

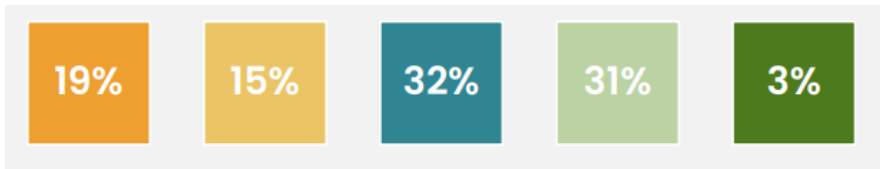
**33%** of the residents surveyed considered the Azores to be a "Developed (4)" or "Very Developed (5)" tourist destination but indicated that there was plenty of potential to improve the quality of their tourist experience. São Miguel and Terceira were considered the most developed islands.

# Local Satisfaction

## Opinion: Level of Satisfaction with Tourist Activity

### Residents

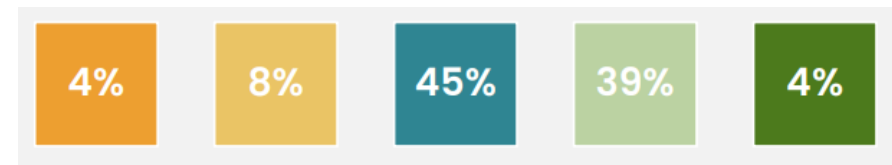
Not very satisfied ← → Very Satisfied



66% of residents are satisfied, fairly satisfied or very satisfied with tourism in the Azores archipelago

### Trade and Stakeholders

Not very satisfied ← → Very Satisfied



88% of the trade and stakeholders are satisfied, quite satisfied or very satisfied with the activity in the Azores archipelago.

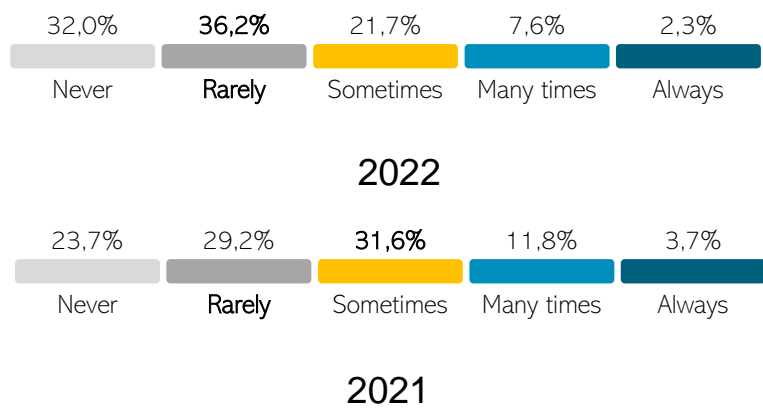
# Local Satisfaction

## Participation in the Tourism Development process

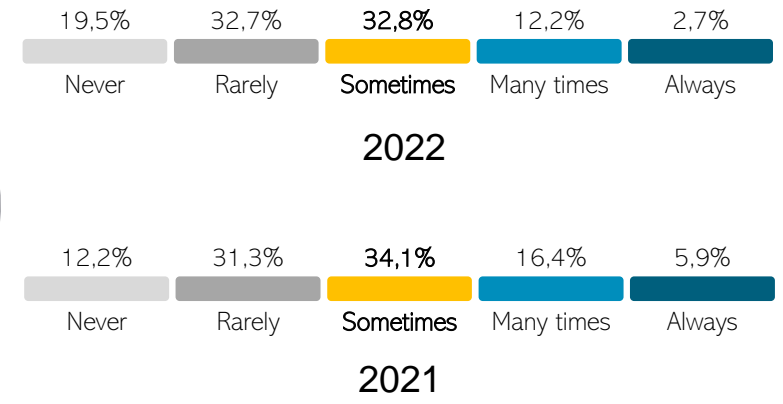
How often the following situations occur:



Involvement in decision-making about tourism development processes on their island of residence



Receives adequate information to understand the tourist development of their island of residence

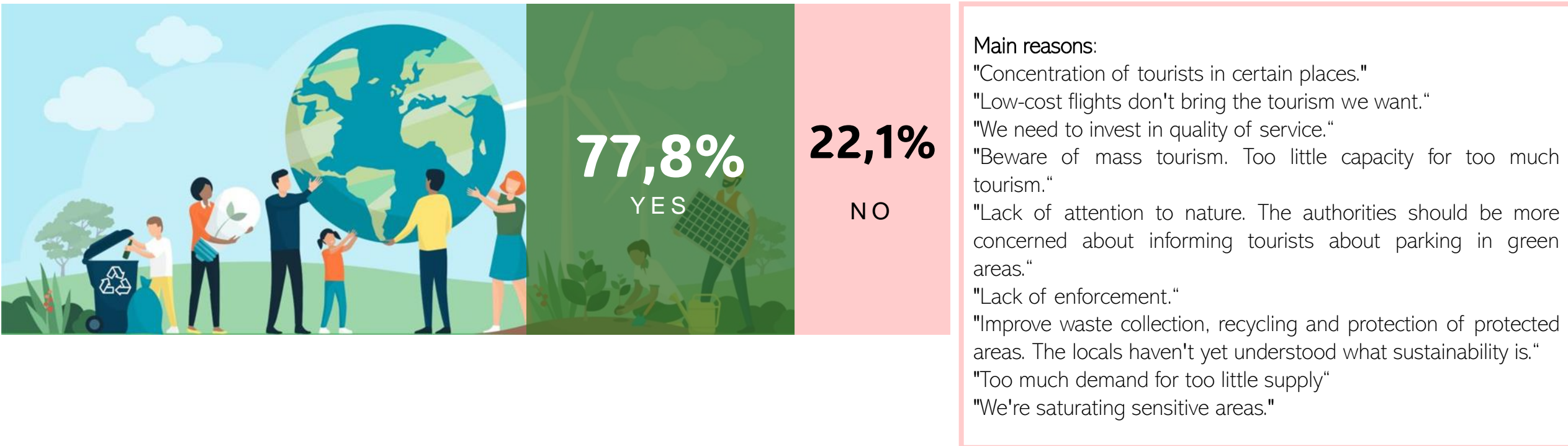


Source: OTA Survey "PERCEPTION OF AZORES RESIDENTS REGARDING THE DEVELOPMENT OF TOURISM IN THE REGION AZORES TOURISM SURVEY"

# Local Satisfaction

## Participation in the Tourism Development process (2022)

**Are residents convinced that the Azores is following a sustainable tourism model?**



# Environmental Management

Energy, Water, Solid Waste



# Environmental Management

## PROTECTED AREAS

In terms of the design of the Island Natural Parks, 124 areas are protected, with a total of 180,374 ha:

- 56 219 ha of terrestrial area (25% of the total terrestrial area);
- 124 155 ha of marine area

<b>Nature reserves</b> <b>19</b>	<b>Natural monuments</b> <b>11</b>
<b>Protected landscape areas</b> <b>16</b>	<b>Protected Areas for Resource Management</b> <b>30</b>
<b>Protected Areas for the Management of Habitats or Species</b> <b>48</b>	

# Environmental Management

## Bathing Waters/Blue Flags

% of good and excellent bathing waters in the total number of bathing waters in the Azores destination

<b>2018</b>	97,2%
<b>2019</b>	100%
<b>2020</b>	91,0%
<b>2021</b>	91,7%

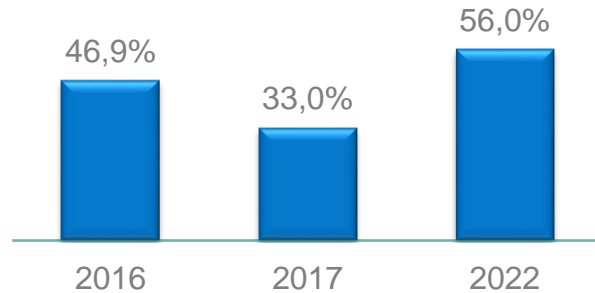
Nº of bathing areas with blue flags

<b>Year</b>	<b>Nº flags</b>
<b>2016</b>	34
<b>2018</b>	37
<b>2019</b>	39
<b>2020</b>	42
<b>2021</b>	45
<b>2022</b>	42

# Environmental Management

## ENVIRONMENTAL CERTIFICATION AND INVESTMENTS

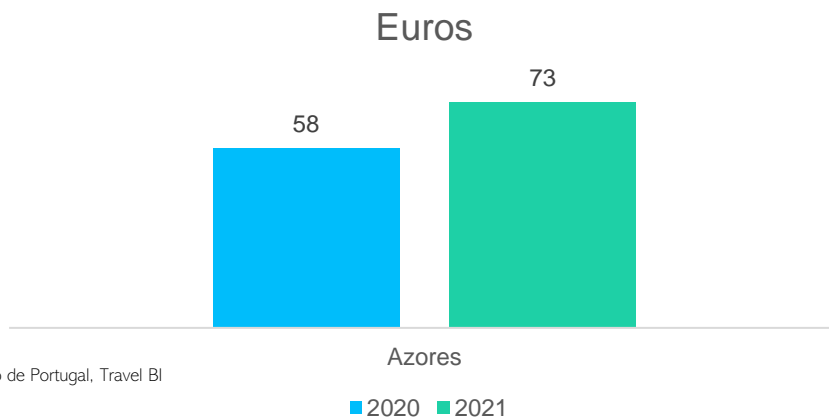
Hotel establishments with at least one environmental certification, Azores



NUTS II - Establishments with at least one certification

NUT II	Establishments with at least one certification, 2022
<b>Azores</b>	56%
<b>Algarve</b>	48%
<b>Norte</b>	43%
<b>Lisboa</b>	39%
<b>Alentejo</b>	39%
<b>Madeira</b>	35%
<b>Centro</b>	28%

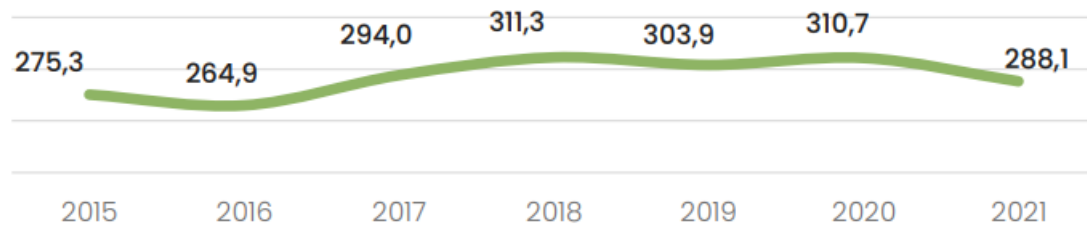
Total environmental expenditure per 1000 inhabitants, K



# Environmental Management

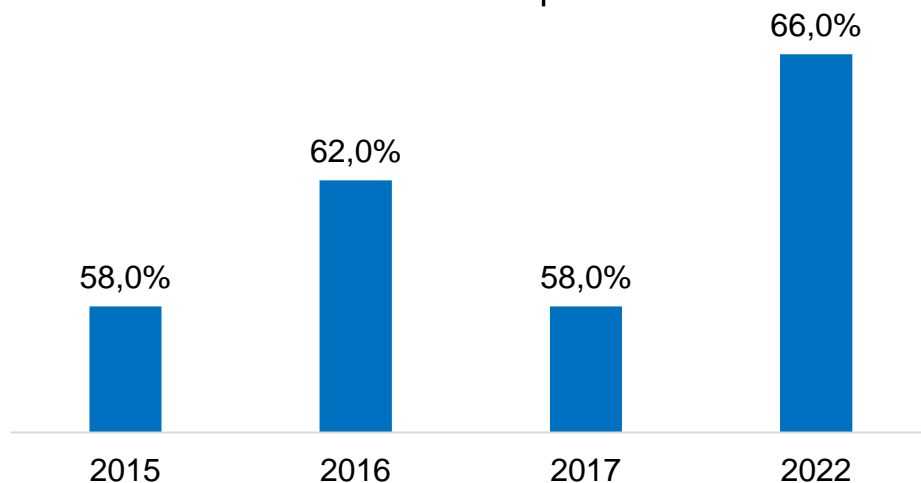
## ELECTRICITY

Electricity from renewable energy, Azores



Source: PEMTA 2023

Tourist establishments that optimize energy consumption



Source: Turismo de Portugal, Travel BI

35% of the electricity produced in the Azores in 2021 came from renewable sources, which is equivalent to 288 million kWh. Compared to 2015, 5% more electricity was produced from renewable sources in 2021, an increase of around 13 million kWh. The Azores are on the road to a more sustainable energy transition. In January 2023, awareness-raising and training sessions were held on energy saving and efficiency - "Azores on the Energy Route", raising awareness among the local community and the various sectors of activity about sustainability, in this case through energy.

Electrical energy, Restaurants and accommodation,

KWh consumption

2019	2020	2021
59 038 017	41 339 514	50 799 754

# Environmental Management

## WASTE

Municipal waste: total and by type of destination operation

Energy valorization			Organic valorization		
2019	2020	⊥ 2021	2019	2020	⊥ 2021
24 998	24 447	⊥ 26 921	22 517	22 581	⊥ 24 496

Each ton of treated waste produces an average of 400-500 kwh of electricity.

Landfill		
2019	2020	⊥ 2021
65 299	63 702	⊥ 64 871

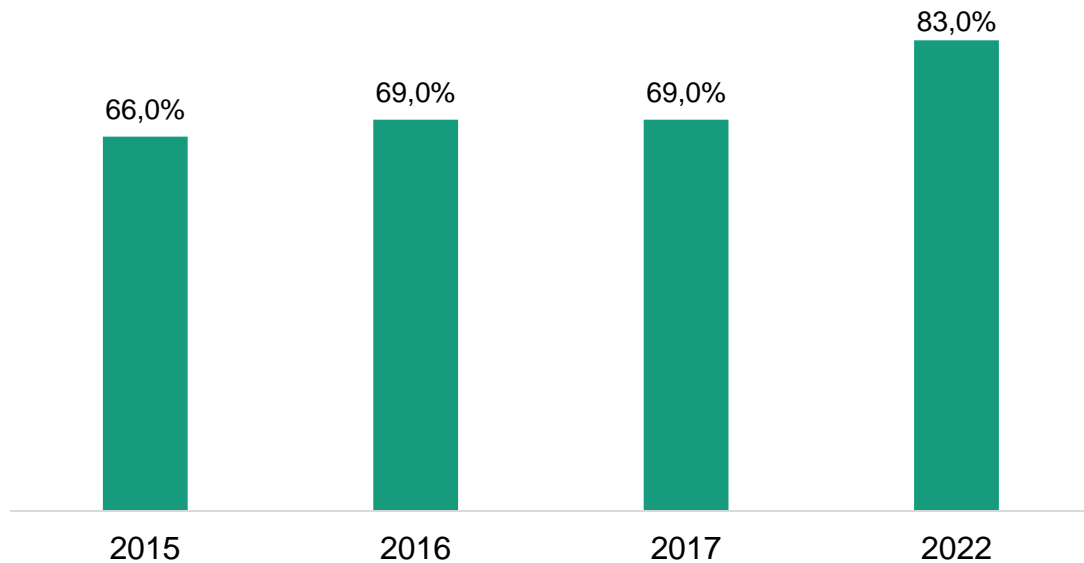
Recycle		
2019	2020	⊥ 2021
32 908	31 069	⊥ 33 856

⊥ - Breach of Serie/Data

# Environmental Management

## WASTE

Hotel establishments that separate waste, Azores



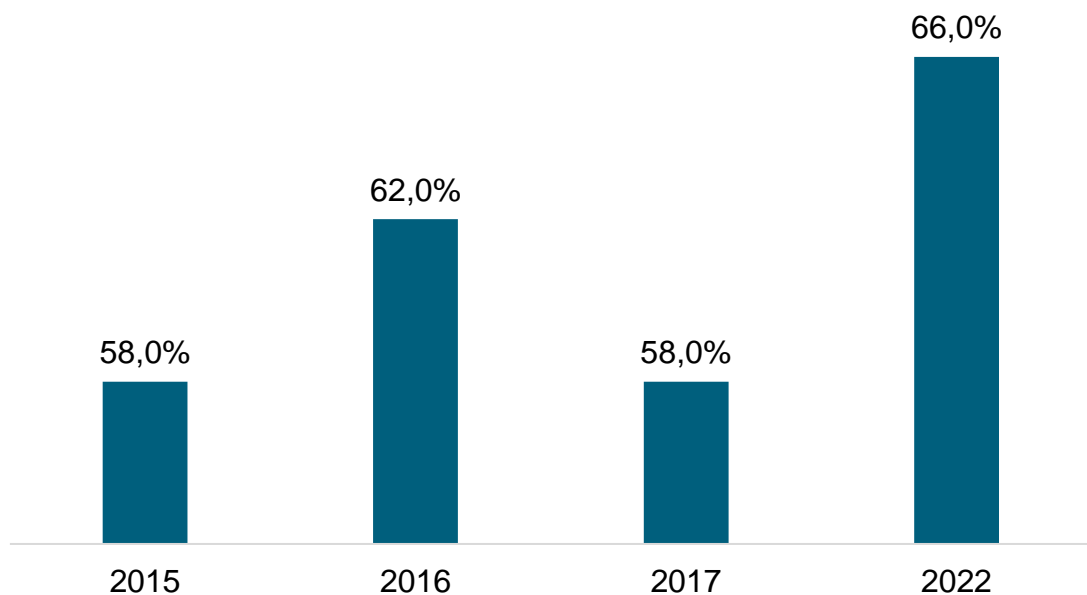
Urban waste generated by tourism, Azores

Year	Waste (t)
2017	309
2018	350
2019	384
2020	115
2021	243

# Environmental Management

## WATER

Touristic Establishments that optimize water consumption



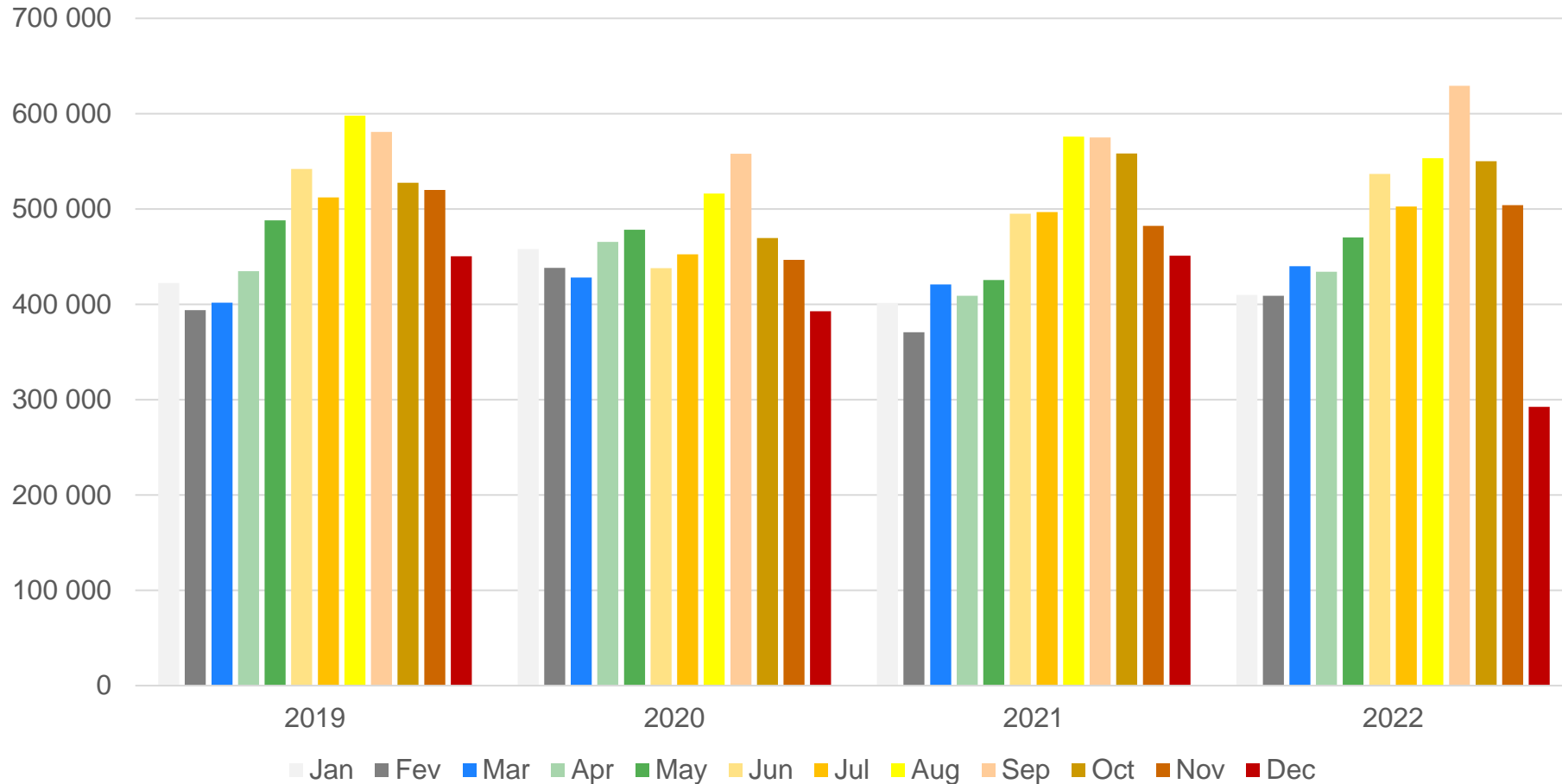
Amount of water invoiced in the Azores by private companies, per year (m3)

2019	2020	2021	2022
5 871 118	5 540 653	5 661 366	5 730 683

# Environmental Management

## WATER

Amount of water billed to private companies in the Azores, per month (m3)



# Climate Change



# Climate change

Through the Regional Secretariat for the Environment and Climate Change, the Region is developing the Azores Carbon Neutrality Roadmap, as part of the application approved by REACT-EU.

- This roadmap will make it possible to define different evolution scenarios and assess the potential for reducing greenhouse gas emissions in the region's various sectors of activity.
- The implementation of this project will make it possible to create metrics relating to the balance between greenhouse gas emissions into the atmosphere and carbon sequestration capacity in the Azores.

Example of the mitigation measures needed for the Azores to achieve carbon neutrality: Use of SAF fuel by SATA.

# Climate change

## **44% of fossil fuel consumption is fuel oil.**

By 2022, around 44% of fossil fuel consumption in the Autonomous Region of the Azores will come from fuel oil. With regard to Category 1 and 2 greenhouse gas emissions, in 2022 there was a figure of 4.29 (t CO<sub>2</sub>-e/person year), which represents an increase of around 16% compared to 2021.

## **In 2023, the Azores had 53 charging points for electric vehicles.**

In the Azores, in 2022, there were 44 charging points (18 fast charging and 26 normal charging). In 2023, there was an increase of 12 normal charging points, but the number of fast charging points remained the same.

## **5,800 passengers contributed to the Voluntary Carbon Offset Program.**

Compared to 2021, in 2022 there was a 31% increase in CO<sub>2</sub> emissions from inter-island passengers, however, the number of passengers also increased by 32%. Despite the growth in emissions, the Azores remains committed to carbon neutrality, and in the first year of SATA Azores Airlines' Voluntary Carbon Offsetting Program more than 5,800 passengers offset the emissions produced by their trips.

# Climate change

## Meteorological events

2006 - In September, two hurricanes passed through the Azores, the first Hurricane Gordon which passed through the Central and Eastern group and the second Hurricane Helene which passed north of the Western group.

2012 - August 19, Hurricane Gordon passes between the islands of São Miguel and Santa Maria, causing some minor damage in Santa Maria. In September, tropical storm Nadine hit the archipelago twice.

2016 - On January 14, a cyclone that arose in the Caribbean Sea moved south of the archipelago and formed Hurricane Alex. The Azores Regional Civil Protection and Fire Service again issued a red alert for the islands of the Central and Eastern Groups.

2017 - On October 14, Hurricane Ophelia hit the islands of the Eastern Group (São Miguel and Santa Maria) with a Category 3 storm, but without causing serious damage. Only fallen trees, minor flooding and landslides were recorded.

2017-2018 - From December 2017 to August 2018, the archipelago was affected by a period of drought. Several agricultural crops were affected, with heavy losses being recorded.

2018 - Tropical Storm Helene hits the archipelago on September 15, with the islands in the western group (Flores and Corvo) being most affected.

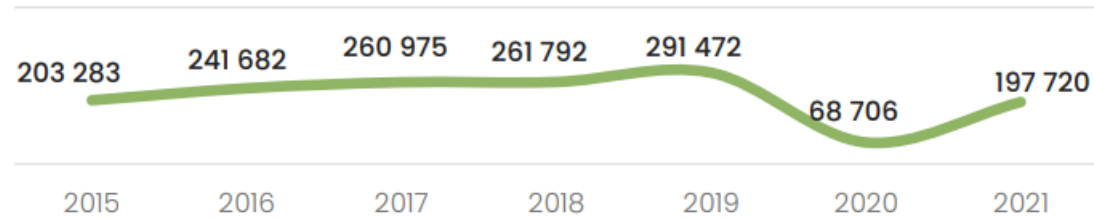
2019 - Hurricane Lorenzo hit the archipelago, especially the islands of Flores, Corvo, Faial and Pico on October 1 and 2. The Azores Regional Civil Protection Emergency Plan was activated, and several alerts were issued.

# Culture

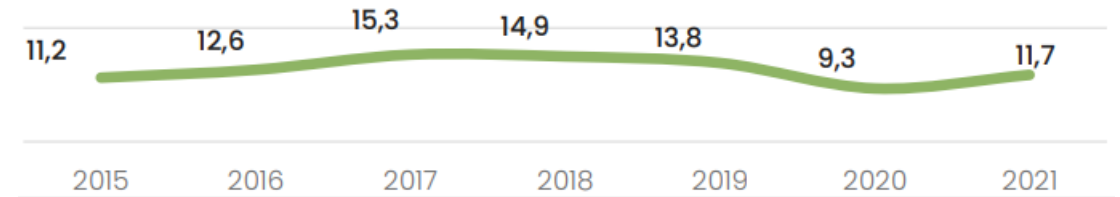


# Culture

Number of visitors to museums



Expenditure on cultural and creative activities (million €)

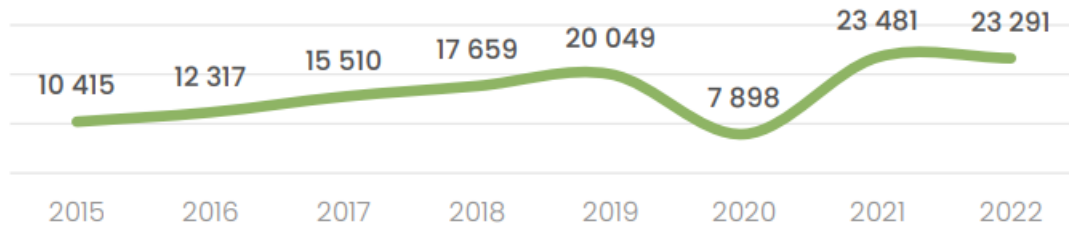


Number of spectators attending live shows

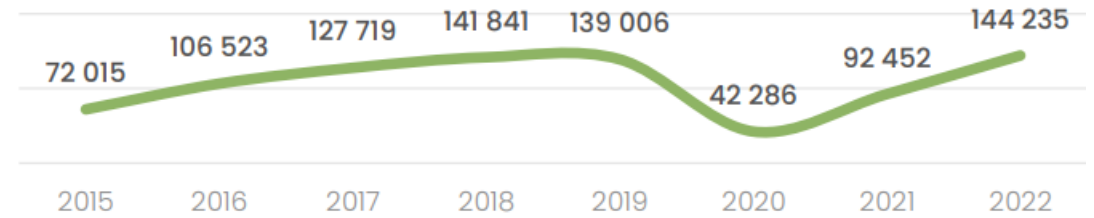


# Culture

## Number of visitors climbing Pico mountain



## Evolution of visits to volcanic caves



## Evolution of visits to the Environmental Interpretation Centers



# Culture

## Creative Tourism Azores

### **CREATOUR Azores - Turning the Azores into a Creative Tourism Destination 2019 Mar -2022 Dez**

The “CREATOUR AZORES” is a project coordinated by OTA - Azores Sustainable Tourism Observatory and by the University of the Azores and developed in partnership with the Center for Social Studies (CES) at the University of Coimbra. It is funded by the ERDF, through the operational program Azores 2020 and by regional funds, through the Regional Directorate of Science and Technology.

The “Creatour Azores” project aims at supporting projects and initiatives that develop creative tourism offerings, leveraging the potential of cultural activities in the region in order to contribute to the sustainable development of tourism in the Azores.

As an integrated applied research project, “CREATOUR AZORES” also aimed to help empowering local agents in the design, implementation and promotion of small-scale and place-based creative tourism offers which are both sustainable and internationally attractive. Other more specific objectives of the project were: 1) bringing tourists to interact creatively with the culture and territory of the Azores; 2) offering visitors the opportunity to develop their creative potential by co-creating experiences with local agents, becoming themselves creative agents within Azorean tourist destinations; 3) linking tourism to creativity through added-value products, thereby increasing awareness of intangible heritage and creativity; and 4) contributing to the sustainable growth of Azorean tourism by revitalizing existing tourism offers and/or fostering technological innovation and efficiency in tourist services.

# Culture

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### CREATOUR Azores - Turning the Azores into a Creative Tourism Destination 2019 Mar -2022 Dez

Pilot Project	Type	Creative Tourism Activities
The Farm Tour Experience	Independent Agricultural Business	This farm pilot project located in the northeast of São Miguel Island invites visitors to experience sustainable organic farming practices, animal welfare, and local healthy food promoting good health and well-being among the visiting clients.
Local Network - Land of Artisans	Local Non governmental Association	Based in the rural western area of São Miguel island, this inclusive community-based pilot project coordinates a network of local artisans and handicraft connecting visitors with the local population of artisans.
Discover the Azores though Photography	Independent Photography Business	With a b-n-b base in the urban southern coast of São Miguel island, this pilot provides workshops on photographing landscapes, flora and fauna, and local food culture throughout the island.
Azores - All in Blue	Inclusive Tourism Initiative	Based in São Miguel island, this pilot project offers an inclusive creative tourism experience to connect families of children with autism spectrum disorders with the nature and culture of the Azores.

# Culture

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Pilot Project	Type	Creative Tourism Activities
Good by Azores	Independent Art Residence	This pilot project offers creative experiences in an artistic residence located on “Terceira” island, as visitors get to know the artists' work and create their own unique Azorean souvenirs.
Mahilawake	Independent Women's Wellness Business	From “Faial” island to the surrounding sea, this pilot project organizes aquatic adventure trips for the personal growth and wellbeing of women, connecting mind, body, nature, and community.
Art in Nature	Cultural Association and Arts Partnership	This pilot project promotes music, visual arts, photography, cinema, etc. all related to the nature of “Pico” island and implemented through dynamic local, regional, and international partnerships.

# Culture

## Creative Tourism Azores

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In the context of this project, creative tourism was understood as the design and implementation of small-scale creative initiatives which encourage personal self-expression and interaction between visitors and locals, inspired by the endogenous resources of a place and its people, and “designed and implemented by local residents for community benefit” ) By attracting visitors for longer stays in less touristed places, ideally during low season, small-scale creative tourism can foster more sustainable local development strategies since it can be “tailored to achieving higher value from the smaller numbers’ of tourists” involved, dimensions that are of great relevance to island destinations. And when we think about “the value to be generated from tourism, we should also think about all potential forms of value—cultural, educational, symbolic, social, intrinsic, institutional,” and environmental, we add— “rather than just economic value” In smaller cities and more peripheral rural communities, and particularly in island contexts such as the Azores, creative tourism initiatives are meant to foster local identity in relation to sense of place, contributing to capacity building and local empowerment, community cohesion and pride in local culture among residents, and economic development and renewal. **By developing creative cultural initiatives on the islands, creative tourism connects heritage and people to places and is an important strategy towards a sustainable tourism development, especially in a rural setting in small nature-based islands destinations, like the Azores**



# Culture

## Creative Tourism Azores

### CREATOUR Azores - Turning the Azores into a Creative Tourism Destination 2019 Mar -2022 Dez

The “CREATOUR AZORES” research project demonstrated that creativity can promote the Azorean economy in a sustainable way and shows the sustainable development potential based on creativity and how open and participatory political processes can help identifying and defining competitive advantages and regional priorities, promoting new procedures, strategies and partnerships.

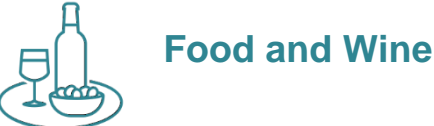
Creative tourism initiatives are bringing visitors to rural and low-density Azorean islands’ territories, highlighting the natural, cultural, historical and geographical diversity of the islands. It is assumed to be a strategy that potentially creates economic wealth for places that have benefited little from tourist demand, especially rural and low-density territories, which is the case of many places located in the island of São Miguel, Azores. The “CREATOUR AZORES” pilot projects highlight the potential of tourism not exclusively focused on the product “nature”, but also in the local culture, to contribute to the discovery of the Azorean culture, still unknown to the majority of its visitors, enhancing rural local development, blurring seasonality and contributing to the support of local identities.



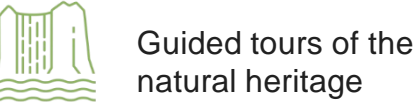
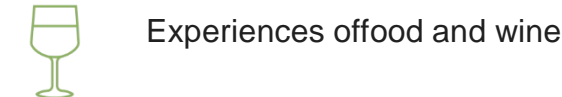
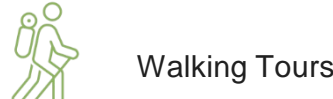
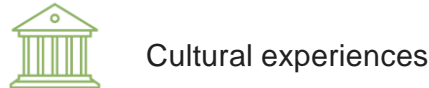
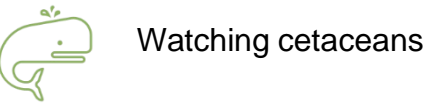
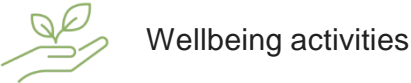
# Culture

Online content published about the Azores

## Most traded products



## Most commercialized activities

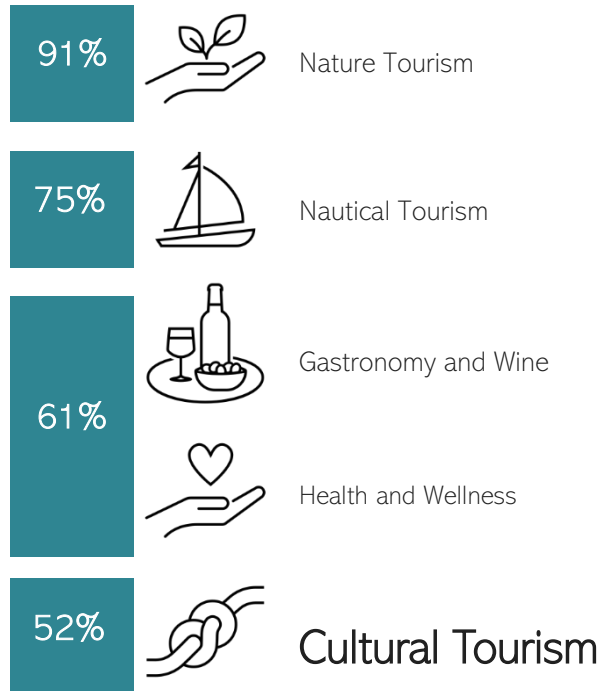


Source: PEMTA (IPDT analysis of the online content of the websites of 47 tour operators marketing the Azores | period of analysis 10-13 January 2023)

# Culture

## Perception of Trade and Stakeholders

Which products will be most important in tourism?



The tourist experience increasingly includes dimensions that go beyond traditional visits. There is a greater demand for immersive experiences, where tourists are directly involved with the local community and get to know their culture, traditions, crafts and agriculture in depth, through offers that promote their active participation, co-creation and learning. The tourist experience thus adds deeper elements that allow the traveler to understand the essence of the destination, its community and enrich personal knowledge.

### QUALIFYING FACTOR OF THE AZORES

On all the islands, various religious and cultural traditions and Azorean products of national and international reference

### VALUE ADDED TO THE DESTINATION (environment, economy, society and culture)



# Accessible Tourism



# Accessible Tourism

The Azores Sustainable Tourism Observatory in the survey on " Sustainable Practices in Azorean Tourism Companies, 2020 " included questions on inclusive tourism. This market segment is constantly evolving. Here comes the question: Are Azores tourism companies prepared to receive tourists with special needs?

**636 valid surveys**

\*Accommodation  
Restaurants  
Tourist entertainment company

Aspects that have made tourism business infrastructure accessible:



61.3% of companies have adapted parking



32.5% of companies have adapted their rooms and sanitary facilities;



8.9% of companies have entertainment activities adapted for people with special needs;



1.7% of companies have information in Braille;

# Accessible Tourism

The Azores Tourism Observatory in the survey on " Sustainable Practices in Azorean Tourism Companies, 2021 " included questions on inclusive tourism. This market segment is constantly evolving. Here comes the question: Are Azores tourism companies prepared to receive tourists with special needs?

**443 valid surveys**

\*Accommodation  
Restaurants  
Tourist entertainment company

Aspects that have made tourism business infrastructure accessible:



15.7% of the companies have adapted parking;



25.8% of companies have adapted their rooms and sanitary facilities;



11.1% of companies accept guide dogs and provide essential items to make their stay easier;



4% of companies have braille information;

# GOVERNANCE

## Azores Leading Sustainable Tourism



# Governance

## **Certification of the Azores as a Sustainable Tourism Destination**

The government structure of the Autonomous Region of the Azores has defined the sustainability of the territory as one of the priorities for its actions, especially in the last two decades. Promoting a policy of facilitating the implementation of measures to encourage an increase in sustainable practices, such as preserving the essence of the territory, enhancing cultural elements, improving the quality of life of the local community and encouraging economic activities that add value to the territory, has been one of the guiding paradigms for decision-making in the territory in recent years. Due to the growing importance of the tourism sector in the region's economic chain, as is the case worldwide, the Government of the Azores decided to submit to the Certification of the Azores as a sustainable tourist destination, recognized by the GSTC criteria, achieving Silver certification in December 2019. However, this is an ongoing process in which the Azores must - every day - show positive progress towards the sustainable development of the territory. In this line of action, we aim to achieve Gold certification as a sustainable tourist destination by EarthCheck in 2024, thus reinforcing the ARA's position as a leading international reference destination in terms of the most demanding tourist destination sustainability standards defined by the GSTC.

# Governance

Certification process



International Organization that  
promotes the universal principles  
of Sustainable Tourism  
Defines international standards  
for accredited entities



EARTHCHECK

EarthCheck is the world's  
leading scientific  
benchmarking, certification  
and advisory group for travel  
and tourism.

# Governance



**Sustainability is only effective if it is a collaborative process**

The Azores DMO works as a 'catalyst' structure for sustainable development

**“We can’t manage what we don’t measure.”**

— Peter Drucker

# Governance

## DMO Azores

The Azores Tourism Destination Sustainability Management Structure (Azores DMO), created in 2018 by Government Council Resolution 58/2018 of May 15, 2018, and with a mandate renewed by Resolution 91/2021 of April 21, 2021, is the entity responsible for managing the destination's sustainability under the Regional Secretariat with responsibility for tourism. The Azores DMO is therefore the structure mandated to plan, organize, implement, manage and supervise the certification of the Azores as a Sustainable Tourism Destination, as well as to monitor the implementation of the strategy adopted for the tourism sector in the Azores.

The creation of this structure comes in a context in which tourism is increasingly asserting itself as a fundamental sector for the territory and in which the development of the Azores destination must be distinguished by its sustainability.

The Azores DMO's initiatives are coordinated with the population, members of the private sector and the public sector, both municipal and from various departments of the Regional Government, as well as with Associations and NGOs.

Source: DMO"

## Together we plan, implement and monitor

### Advisory Committee

Made up of associations representing the economic sectors and public and private agents, with the aim of monitoring, issuing opinions and making recommendations on the certification process of the Azores.

### Monitoring Group

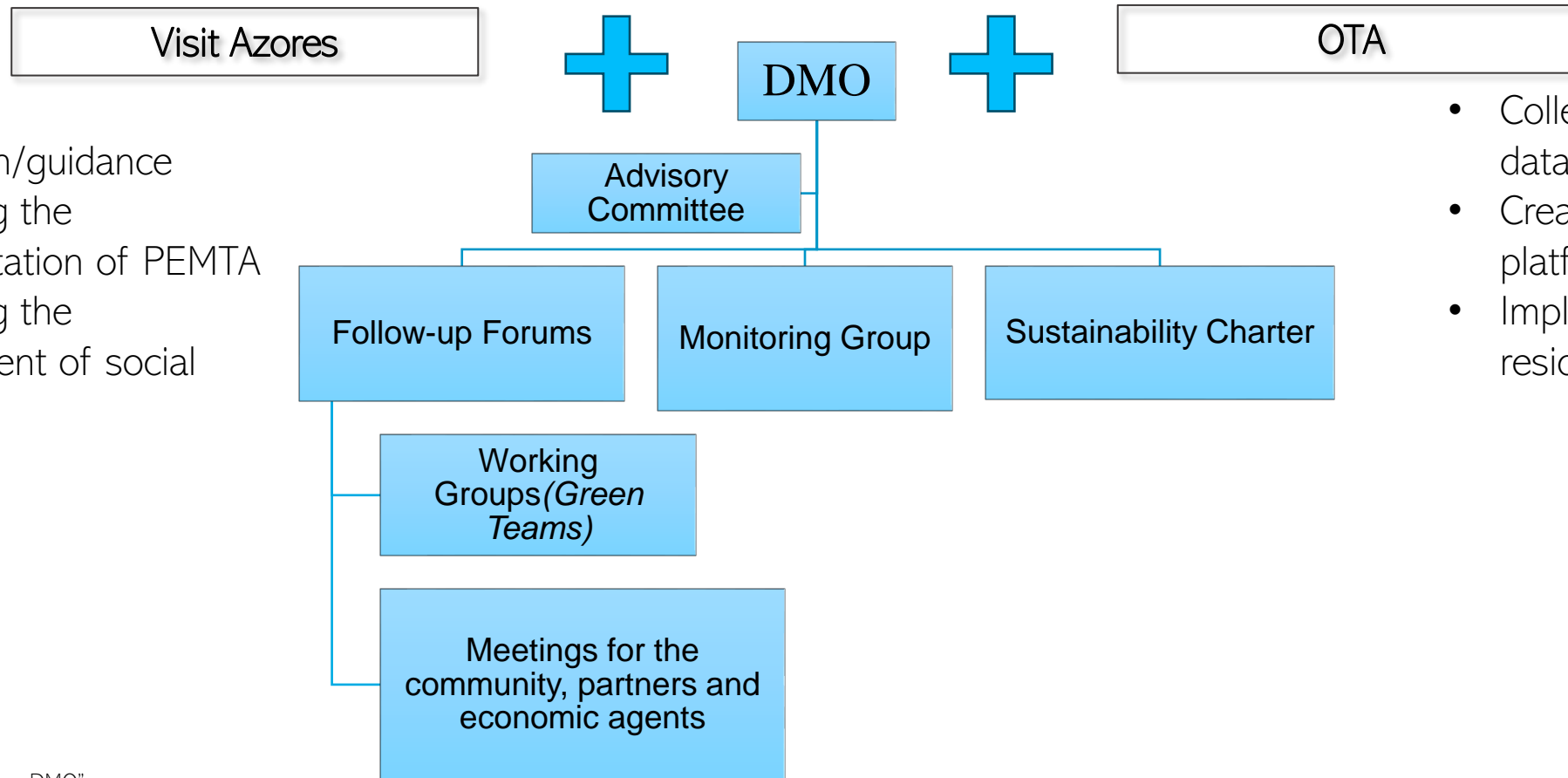
Made up of public entities, with the aim of operationalizing the implementation of measures and actions aimed at requirements and goals of the certification.

### Green Teams

Made up of public and private entities representing local interests, in the form of Green Teams (on each of the nine islands) and meetings for the community, partners and economic agents. The entities that signed the Azores Sustainability Charter are an integral part of these forums.

# Governance

DMO performance



- PEMTA articulation/guidance
- Monitoring the implementation of PEMTA
- Monitoring the management of social networks

- Collection of statistical data
- Creation of a shared data platform
- Implementation of resident/tourist surveys

Source: DMO"

# Governance

## DMO performance

Area of Activity	Actions	Description	Period
<b>QUALIFICATION AND VALORIZATION OF THE OFFER</b>  (PEMTA 2030 actions under the responsibility/shared responsibility of the Azores DMO)	Continue the process of certifying the Azores as a sustainable tourist destination by EarthCheck.	Continuing the process of certifying the Azores as a sustainable tourist destination and continually encouraging the adoption of sustainability practices by companies, Azorean citizens and tourists.	2023-2030
	Qualifying and planning tourist activities as a guarantee of adopting quality criteria	Qualifying tourist activities (accommodation, tourist entertainment, rent-a-car, restaurants...) from an educational, awareness-raising and support perspective, leading to compliance with quality criteria, by recognizing the importance of this factor in satisfying the overall experience of visitors and, consequently, in the success of the destination; Develop a study of the impact of boats on whale watching.	2023-2030
	Empowering small and medium-sized tourism businesses on digitalization	Raising awareness and supporting small and medium-sized tourism businesses in their digital transition, ensuring that they have digital skills - in terms of business management, communication, monitoring, among others, making them more competitive, so that they can improve the quality of visitor experiences.	2024-2030
	Create a development plan for the destination's strategic products	Create a development plan for each product identified in PEMTA2030: Main and Complementary; Develop operational plans for the implementation of PEMTA actions, in line with its guidelines and timetable; Draw up a study of the economic impact of tourism on all sectors in the region.	2024
	Promote the decarbonization of the Azorean tourism sector	Promote the decarbonization of the Azorean tourism sector by monitoring and analyzing the sector's impacts on climate action; Implementing the respective measures to mitigate these impacts, duly articulated with regional and national instruments aimed at decarbonizing the decarbonization of the economy in the Azores.	2023-2030

# Governance

## DMO performance

<p>PROMOTION</p> <p>(PEMTA 2030 actions under the responsibility/shared responsibility of the Azores DMO)</p>	<p>Fostering the digital transition of communication at the destination</p>	<p>Qualifying and making efficient the communication of the destination and its companies, through a digital strategy that guides communication and promotion actions.</p>	<p>2023-2030</p>
	<p>Develop actions to raise awareness of sustainability among visitors</p>	<p>Develop actions to make visitors aware of the need to adopt responsible behavior during their trip (before and during); Study the development of a tool to enable visitors to the Azores to calculate and offset the carbon footprint of their visit.</p>	<p>2023-2030</p>
	<p>Developing campaigns for residents</p>	<p>Develop awareness-raising campaigns aimed at resident citizens (including the school community) about the importance of tourism in the development of the region and in improving their quality of life through the opportunities generated by the tourism dynamic; quality of life through the opportunities generated by tourism and develop campaigns aimed at enhancing tourism professions.</p>	<p>2023-2030</p>

# Governance

## DMO performance

<b>MONITORING</b>  (PEMTA 2030 actions under the responsibility/shared responsibility of the Azores DMO)	<b>Monitoring visitor profile and satisfaction</b>	Develop studies on the profile, consumption habits, satisfaction and dissatisfaction of visitors and their carbon footprint, to monitor their needs, improve the quality of the experience and understand what needs must be improved.	2023-2030
	<b>Monitoring residents' satisfaction with tourism</b>	To survey residents about their satisfaction with the development of tourism.	2023-2030
	<b>Monitoring satisfaction of economic agents</b>	Survey local economic agents to find out their satisfaction with the development of tourism, as well as their outlook for the sector	2023-2030

# Governance



## PEMTA - STRATEGIC AND MARKETING PLAN FOR TOURISM IN THE AZORES

PEMTA 2030 reflects the Autonomous Region of the Azores' strategy for tourism as a key sector of the regional economy. It is based on the principle of creating value for residents, for the territory and is based on promoting year-round tourist activity on all the islands. PEMTA sees sustainability as the central pillar of tourism development. In the context of sustainability requirements, the Azores are committed to continuing development through a dynamic that adds value to the territory, by promoting and implementing actions to preserve the environment and nature, culture and continuously improve the quality of life of the local community. This commitment involves implementing strategic measures based on 4 premises:

- Distribution of tourist flows, reducing tourist concentration;
- Mitigating seasonality, to make the Azores a destination with a structured offer for the whole year;
- Improving conditions for stakeholders, with a tourism dynamic that adds value to communities and businesses;
- Improving the quality of service, ensuring satisfaction with the overall experience at the destination and exceeding expectations.

## Sustainability Charter of the Azores

Created in 2017, this initiative by the Government of the Azores brings together the public, private and associative sectors in a joint journey to accelerate the adoption of the sustainable development principles of the UN's 2030 Agenda in the archipelago. This initiative seeks to support the widespread adoption of sustainable development principles and actions in a holistic and intelligent way, covering almost all sectors of Azorean society. Those who have officially subscribed to the Primer are actively and publicly committing to conducting their business in a greener way. In practical terms, the subscription presupposes the identification by the subscribing entities of three annual commitments and their respective metrics, which align their priorities with the Sustainable Development Goals.

The Azores Sustainability Charter is managed by the DMO and operates as a closed forum, with the following constitution:

- a. Representatives of all the subscribing entities
- b. Representatives of the DMO
- c. Invited experts



## SUSTAINABILITY CHARTER OF THE AZORES

9 Islands

+ 200

SUBSCRIBING ENTITIES

+ 800

COMMITMENTS



## Performance: Results Obtained

### Highlights: Water

#### 4% less water consumed (kl/person year)

In 2022, drinking water consumption was 80.1 (kl/person year), representing a decrease of 4% on the previous year. The total consumption of drinking water in the Azores in 2022 was 19.6 million kl, a decrease of 2% compared to 2021.

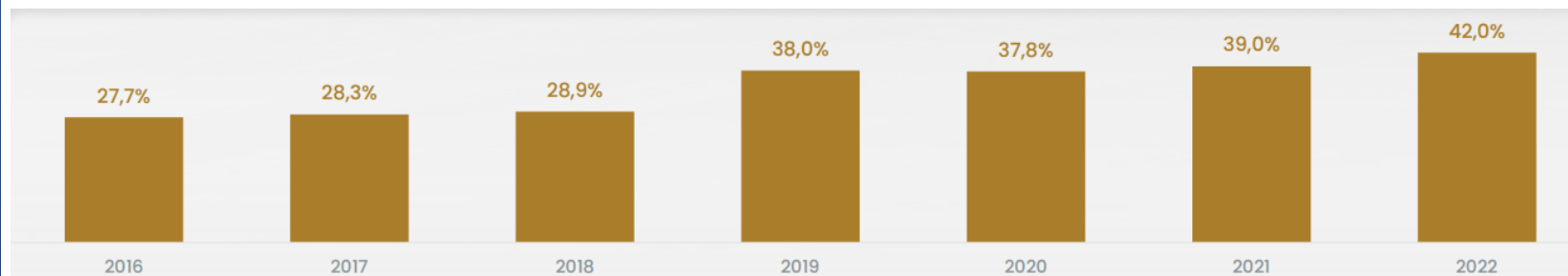
**99.01% safe water in 2021.** In 2020, the safe water indicator was 98.82%, compared to 2021 this figure grew by 0.19 percentage points to 99%. It should also be noted that in 2022, 97.1% of the analyses carried out were compliant.

In 2023, the Azores approved the amendment to the **Regional Water Program**. This strategic document presents guidelines for the efficient management of the quality and quantity of water resources in the Autonomous Region of the Azores. The Regional Water Program aims to ensure the enhancement and protection of water resources.

# Governance

## Performance: Results Obtained

Recycled, reused, composted waste, Azores (%)



### Highlights: Waste

**-3% (m<sup>3</sup>/person year) of waste sent to landfill.**

In 2022, there was a decrease of 0.3m<sup>3</sup>/person year in the amount of municipal waste produced in the Autonomous Region of the Azores, which indicates a reduction of 402 tons compared to 2021. Regarding the waste sent to landfill, there was also a decrease in this figure. In 2022, 0.86 m<sup>3</sup>/person year was sent, which represents a decrease of 3% compared to 2021.

**PRR (Preparation for Reuse and Recycling) rate of 33.4% in 2022.**

The PRR rate in the Azores has grown steadily since 2019. In 2022, this indicator stood at 33.4%, an increase of 1.1 percentage points compared to 2021 and an increase of 3.4 percentage points compared to 2019.

**90,000 reusable cups distributed.**

As part of the "Events + Circular" campaign, which is part of the Regional Circular Economy Roadmap, 90,000 reusable cups were handed out to various event organizations in the Azores, to eliminate single-use cups.

## Performance: Results Obtained

### Highlights: Ecosystems

Between 2011 and 2020, 50,000 shearwaters were saved. The population of shearwaters in the Autonomous Region of the Azores, together with Autonomous Region of Madeira, represents 85% of the world population of this species, so their preservation and the conservation of their habitat is essential. The "SOS Cagarro" campaign, which has been running since 1995, has already saved around 50,000 shearwaters between 2011 and 2020. Only in 2021, 8,354 shearwaters were saved alive.

**Azores certified as a Whale Heritage Site in 2023.** In 2023, the Azores were certified as a Whale Heritage Site by the World Cetacean Alliance. This distinction highlights territories of great importance for whale conservation with the aim of making whale watching more sustainable.

## Performance: Results Obtained

### Highlights: Culture

**Expenditure on cultural and creative activities increased by 26%.**

In 2021, the Azores recorded total expenditure on cultural and creative activities of 11.7 million euros, an increase of 26% on the figure recorded in 2020. Expenditure on cultural and creative activities per inhabitant in 2021 was €49.7, an increase of around 29% compared to 2020.

**Number of museum visitors grows by 188%.** The Autonomous Region of the Azores had 18 active museums in 2021. In that year, the museums of the Azores had a total of 197,700 visitors, which represents an increase of 188% compared to the 2020 figure. This marked the beginning of the recovery of the region's cultural sector after the first year of the pandemic.

**Ponta Delgada: Portuguese Capital of Culture 2026.** In December 2022 it was announced that Ponta Delgada will be the Portuguese Capital of Culture in 2026. This distinction will allow the Azores, particularly the island of São Miguel, to develop the cultural and creative sector, promoting and disseminating Azorean culture on a national scale.

## Performance: Results Obtained

### Highlights: Tourism

#### Overnight stays grow by 68%.

In 2022, the Azores reached a total of 3.24 million overnight stays, an increase of 68% compared to 2021. It should also be noted that the seasonality rate recorded in 2022 was 43.1%, a reduction of 8.7 percentage points compared to 2021. Total revenue in traditional hotels exceeded pre-pandemic results, with growth of 23% compared to 2019.

#### Shuttle access to Lagoa do Fogo now available

On June 15, 2023, access to Lagoa do Fogo began using a shuttle service. The route covers around 14km and passes 6 points of tourist interest. The aim of this system is to control tourist flows and reduce the number of vehicles in the Lagoa do Fogo Nature Reserve. This system works by purchasing tickets which cost 5 euros for visitors (free for residents). Since its inauguration in September, more than 41,000 tickets have been sold.

## Performance: Results Obtained

### Highlights: Accessible Tourism

Azores approves the Digital Strategy for the Inclusion of People with Disabilities.

In July 2023, the Digital Strategy for the Inclusion of People with Disabilities in the Azores was approved. Its objectives are to innovate public policies for inclusion and to reduce disadvantages in the realization of the rights of people with disabilities. One of the initial measures is to implement the teaching of Portuguese sign language in pre-school education. The strategy includes measures that will reduce the barriers to true inclusion.



### 3. Survey's OTA

# Survey's OTA

The Azores Sustainable Tourism Observatory implements 4 surveys:

- Tourist satisfaction when visiting the Azores.

- Residents' satisfaction with tourism in the Azores.

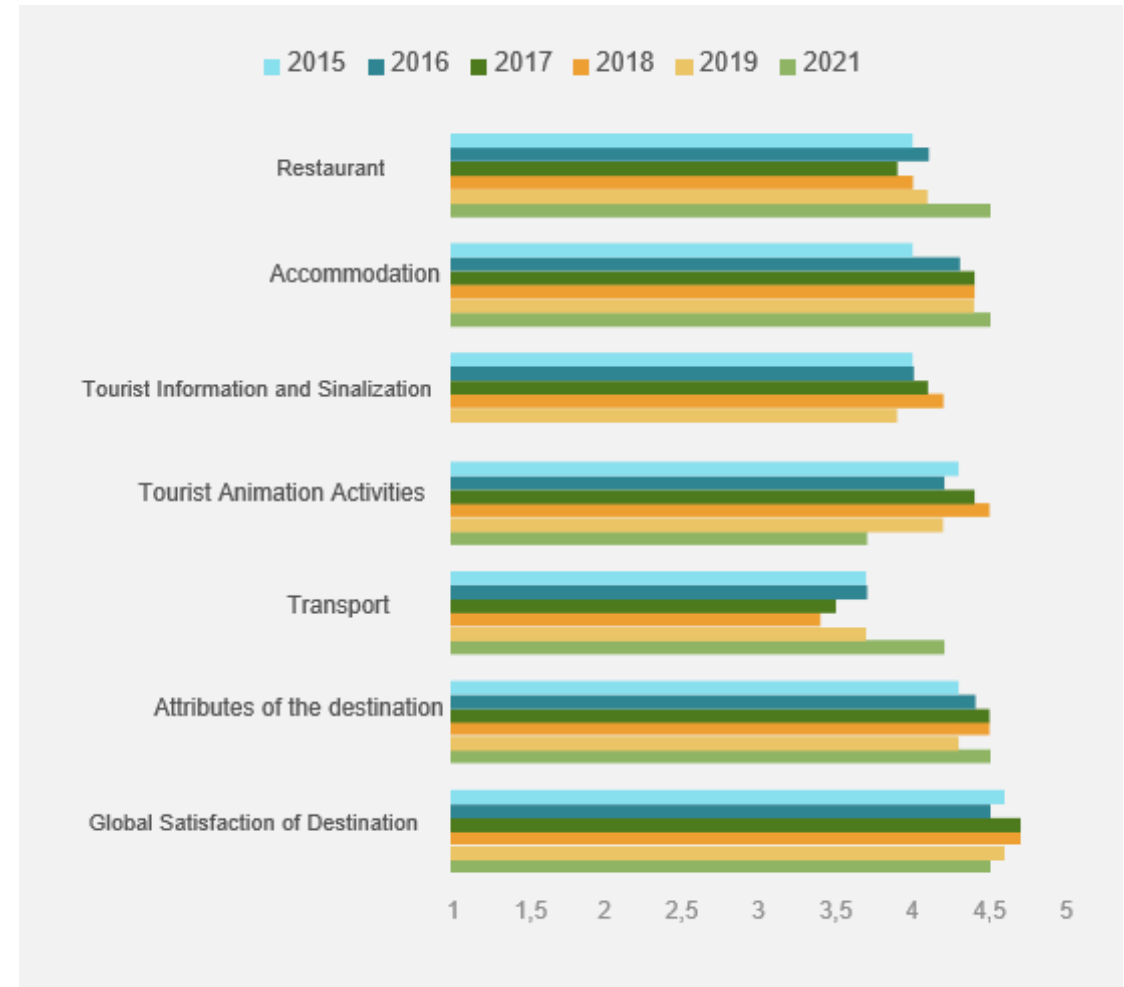
- Sustainable practices in the regional tourism sector.

- Digital transformation of tourism businesses in the Azores.

# a. Tourist satisfaction when visiting the Azores

In 2021, tourists rated the Azores destination 4.5 points in terms of their overall satisfaction (scale of 1-5, with 1-Very Dissatisfied and 5-Very Satisfied). In 2015, tourists' overall satisfaction with the destination was 4.6. The category that shows the lowest level of satisfaction among tourists is Transportation, which in 2021 registered its highest value, with an evaluation of 4.2 out of 5, whereas in 2015 this evaluation was at an average value of 3.7. Restaurants was the area that saw the greatest growth in tourist satisfaction in 2021, reaching a score of 4.5 (4.0 in 2019). Since 2015, this was an area where tourists showed the greatest potential for improvement. Accommodation is the activity with the highest satisfaction among tourists over the years - 4.5 points in 2021.

Source: OTA



## b. Residents' satisfaction with tourism in the Azores

	2021	2022
No. of responses	994	1865
Current level of tourism development in the region	71,4% considers to be Good/Reasonable	79,7%
The development of tourism contributes to:		
Creating jobs for residents	93,1%	86,4%
Developing local/typical economic activities	88,2%	85,7%
Increasing the general level of land and house prices (to buy or rent)	79,4%	79,2%
Increasing the population's quality of life	57,7%	40,5%
Increases stress, disturbs the calm and tranquility of the community	30,1%	35,1%
Increasing the number of cultural events on offer	17,6%	66,2%
Degrades the natural environment	38,3%	39,4%
Likes the presence of tourists	82%	68,8%
Tourism is good for my island	88,2%	68,6%

# c. Sustainable Practices in the Regional Tourism Sector

Main results: 2020 edition for 2019

636 tourism businesses: accommodation, restaurants, tourist entertainment, etc.

The months when there are the most companies operating are May to October;

44% of entrepreneurs considered the evolution of the main tourism indicators in the Azores to be "good";

78.9% of entrepreneurs are aware of sustainable tourism initiatives in the Azores;

29.3% of entrepreneurs have already assessed the impact of their activity on the local environment and development;

94.7% of entrepreneurs have prioritized purchases of regional goods and services;

94.5% of business owners separate their waste selectively;

56% of the business owners surveyed make customers aware of water and energy savings (through leaflets, etc.);

78.1% of entrepreneurs train and motivate employees to implement sustainable practices in their companies;

70.1% of companies do not use alternative/renewable energies, such as solar, photovoltaic or other.

# c. Sustainable Practices in the Regional Tourism Sector

Main results: 2022 edition which relates to 2021

443 tourism businesses: accommodation, restaurants, tourist entertainment, etc.

The months when there are the most companies operating are May to September;

72.5% believe that tourism contributes to the importance of ecological values;

Only 25.5% of entrepreneurs believe that the local community is included in planning and decision-making.

69.6% of entrepreneurs are interested in sustainable tourism initiatives in the Azores;

96.1% of entrepreneurs have prioritized purchases of regional goods and services;

97.1% of entrepreneurs separate their waste selectively;

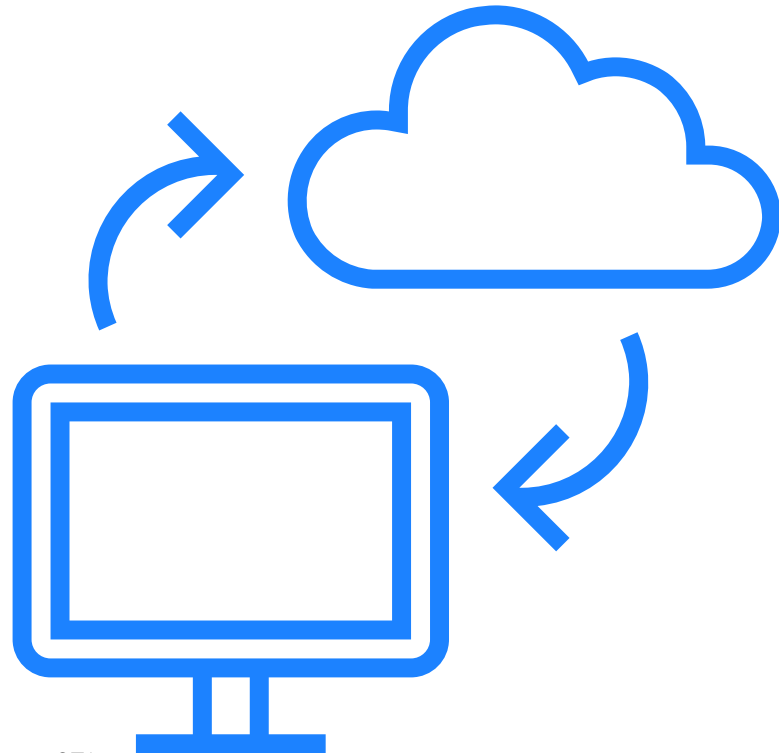
73% of the business owners surveyed make customers aware of water and energy savings (through leaflets, etc.);

58.5% of companies use solar energy;

67.0% of entrepreneurs buy fresh produce and drinks in reusable and returnable boxes or containers.

# d. Digital Transformation of Tourism Businesses in the Azores

Survey: 430 tourist accommodations - 2022



Source: OTA

87,1%

They consider digitalization to be an important matter;

55,5%

They are looking for technological innovations that can be applied in the company;

72,5%

They use digital technologies to transform their business model;

92,7%

They use digital platforms: "TripAdvisor", "Booking", among others;

95,0%

They believe that their business can take advantage of digital technologies;

47,6%

They believe that there are not enough events dedicated to technology in the Azores;



# d. Digital Transformation of Tourism Businesses in the Azores

PEMTA confirms that the majority of economic agents (81.9%) consider that the digitalization of processes and services is very important to stimulate the improvement of the tourist experience in the Azores archipelago.

It is mentioned in PEMTA that one of the strategic objectives of Destination Azores is to promote the digitalization of the destination, particularly of companies, enabling them to actively participate in the global promotion of the Azores.

Regarding the “Qualification and Valuation of the Offer”, one of the actions identified in PEMTA is to train small and medium-sized tourism companies for digitalization. Raise awareness and support small and medium-sized tourism companies for their digital transition, ensuring that these digital skills - in terms of business management, communication, monitoring, among others, making them more competitive, so that they provide an increase in quality of visitor experiences.





### **3. Project's OTA**



# a. The Azores Digital Innovation Hub (Azores DIH)

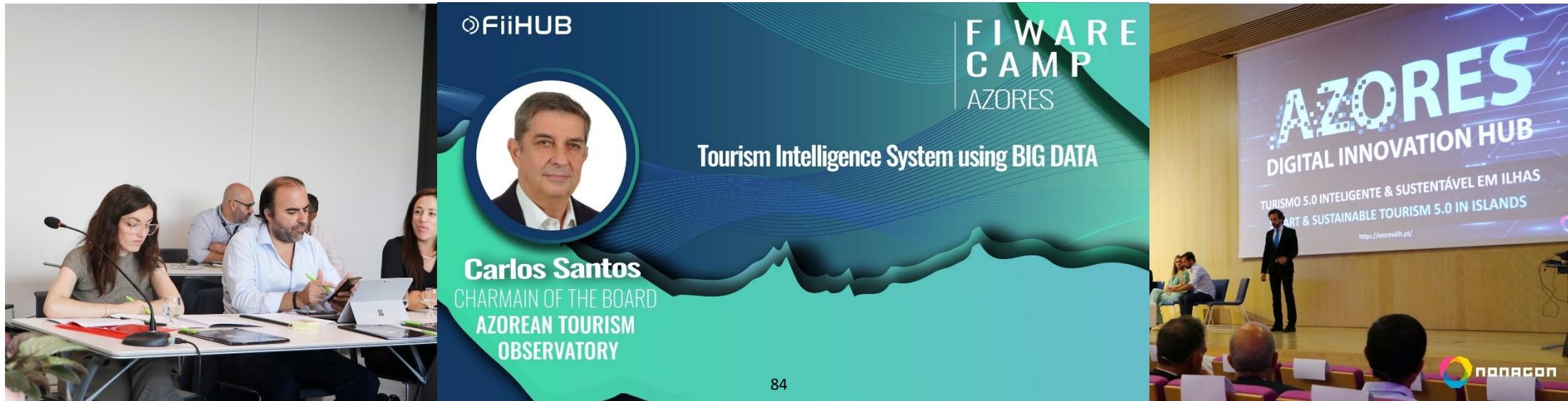
The Strategic Plan and Tourism Marketing for the Azores 2023-2030 (PEMTA 2023-2030) and the Azores Sustainable Tourism Observatory (OTA)

The Azores Digital Innovation Hub (Azores DIH) The Azores Digital Innovation Hub – ADIH- set up on October 8, 2020, is a hub, located in the island of S. Miguel, one of the nine islands of the Portuguese archipelago of the Azores. It aims to provide support to companies in their production and service development processes, using digital technologies. The Azores Digital Innovation Hub is aligned with the Research and Innovation Strategy for Intelligent Specialization (RIS3) of the regional government, including an area dedicated to Intelligent and Sustainable Tourism in Islands. The Azores Sustainable Tourism Observatory (OTA) is a partner of the Azores Digital Innovation Hub, and a member of the UNWTO network of Sustainable Tourism Observatories (INSTO, as well as an UNWTO Affiliated member. OTA obtained approval for an application to develop actions in tourism within the scope of the Azores Digital Innovation Hub.



# The Azores Digital Innovation Hub (Azores DIH)

The Azores Sustainable Tourism Observatory (OTA) Aligned with this vision, the Azores Sustainable Tourism Observatory (OTA), a member of the UNWTO's Sustainable Tourism Observatories network (INSTO) considered to be an example of a good practice in the field of sustainable tourism, aims to strengthen its contribution to making the Azores a competitive and sustainable destination in the world tourism market and considers that this objective can only be achieved through the following two strategies: a) the adoption of new technologies either by public and private entities linked to tourism, or by tourist companies in the region, and b) The professional training of the workforce employed in the tourism sector, including its digital skills training.



# The Azores Digital Innovation Hub (Azores DIH)

According to these guiding principles, OTA's actions are properly framed in a process of disseminating innovative knowledge for technological training both for regional tourist companies and for Azorean public and private entities linked to tourism. OTA will develop its actions within the areas of “Skills and Training” and “Dissemination of Innovation”, both included in the Azores Digital Innovation Hub project (Azores DIH). OTA proposes to develop the following projects in 2024 and 2025:

- Invite five Azorean small and medium tourism companies to participate in international conferences on Tourism and Technology, together with a member of OTA's board.
- Promote 2 workshops per year aimed at facilitating the digitalization process of the Azorean small and medium-sized tourism firms and private and public regional tourism entities, in collaboration with local, national, and international specialized bodies, like UNWTO. Besides disseminating knowledge about technological innovations, the workshops will encourage the debate on innovation and digitalization in tourism through a model, in a networking format, which is very important to encourage sharing of experiences, but also new ideas for small and medium-sized tourism companies.

Concluding, in this ADHI project, OTA will act as a disseminating agent of successful new technologies and innovations among small and medium-sized Azorean tourist companies and regional public and private entities interested in accelerating their digitalization processes.



## b. Monitoring the Mobility of Visitors in the Azores Destination

OTA intends to analyze the profile and mobility of national and international visitors in the 9 islands of the Azores, per day and hour, and in the various geographical areas, in order to support the entities responsible for the management of the tourist destination, decisions based on knowledge and thus contribute to its long-term sustainability. More specifically:

- ✓ What are the most visited islands and places?
- ✓ What is the profile of tourists?
- ✓ Where do national and international tourists travel?
- ✓ At what time of day are the tourist sites most visited?



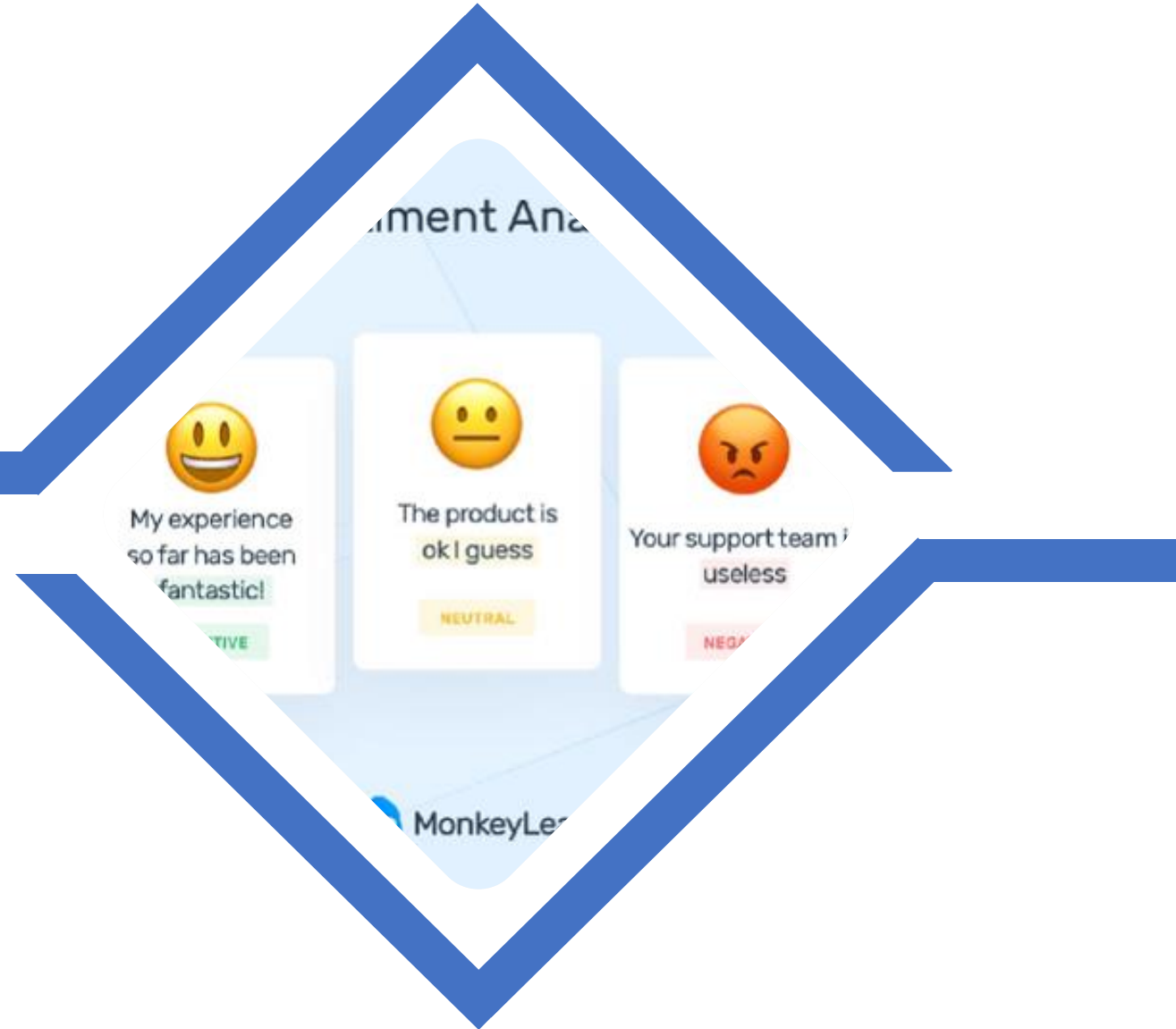
## b. Monitoring the Mobility of Visitors in the Azores Destination



Monitoring (using artificial intelligence sensors and 5G technology)		Mobility indicators  (month, day and time and geographical area)	Reports PowerBI  Location analysis platform
9 islands (main places of tourist attraction)	Autonomous Region of the Azores		
Places of Tourist Attraction in the Island of S. Miguel	Vista do Rei, Lagoa do Fogo e Furnas (S.Miguel Island)		
Analysis of pedestrian flows on the main tracks and vehicles in 30 places and points of tourist interest			

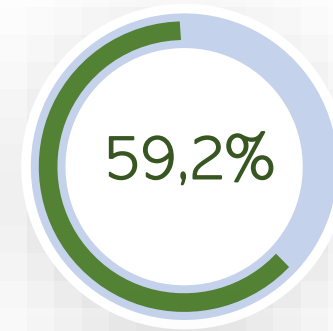
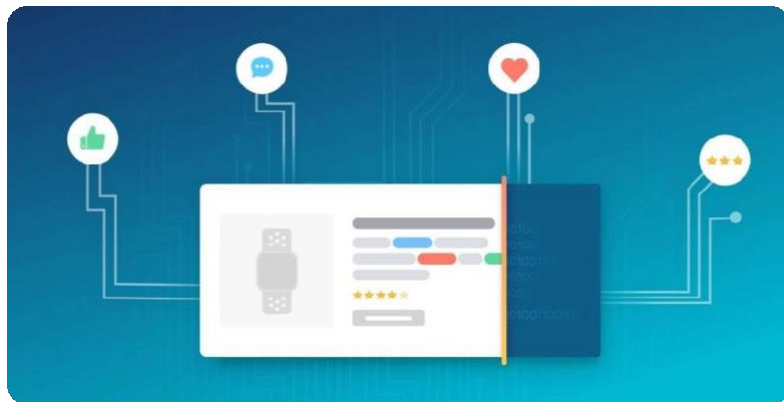
## c. Sentiment Analysis

Analyzing reviews on  
booking  
accommodation



# Sentiment Analysis General Analysis

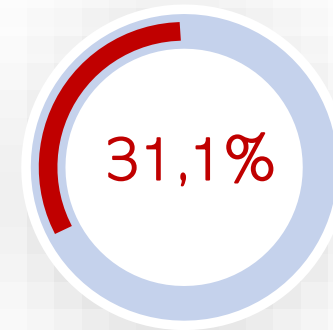
308  
Reviews



Positive

59,2%

182



Negative

31,1%

96



Neutral

9,7  
%

30

# Sentiment Analysis

## Average ratings (1-10)



Hotel staff  
8,9



Vommodities  
7,8



Cleaning  
8,6



Comfort  
8,1

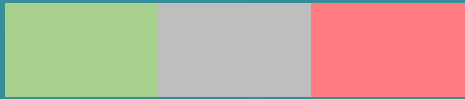


Localization  
8,7



Wi-Fi  
7,7

■ Positive ■ Neutral ■ Negative

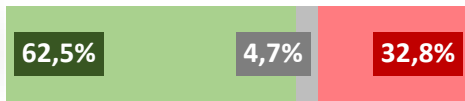


# Sentiment Analysis

## Most referenced aspects



### Bedroom



### Breakfast



### Overnight/stay



### Staff & Reception



### Bathroom/WC



### Price



■ Positive ■ Neutral ■ Negative



# Sentiment Analysis

## Most referenced aspects



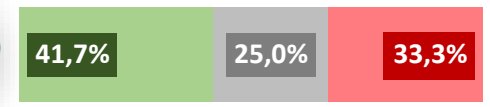
### Localization



### Parking



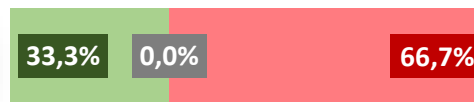
### Food



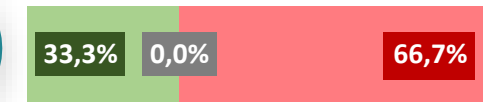
### View



### Wi-fi



### Fixed air conditioning



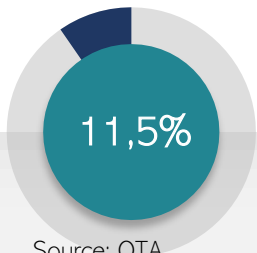
# Sentiment Analysis

Type of traveler

01.



Family



Source: OTA

02.



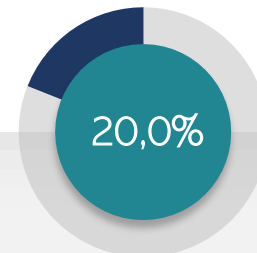
Couple



03.



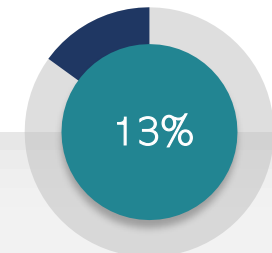
Group



04.



Individual





## 4. Future Goals

# Future Goals

1

## Website

Develop a sustainability area on the OTA website

2

## Indicators

Working with the DMO to obtain and develop various Sustainable Tourism indicators  
Collecting data on energy, water and waste from the companies that manage them

3

## Technological Monitoring System

Invest in the project to Monitor Visitor Mobility in Destination Azores

4

## Surveys

Guaranteeing that tourism companies respond to the surveys developed by the OTA

# Sources

**Turismo de Portugal, Travel BI** - Tourism of Portugal, together with the National Statistics Institute and the Bank of Portugal, are the entities responsible for producing tourism statistics. TravelBI is the open-access tourism knowledge management portal whose mission is to disseminate the activity's main performance indicators and its competitive analysis.

**PEMTA** - Azores Tourism Strategic and Marketing Plan, 2023-2030.

**DMO** - Entity responsible for the Sustainability Management of the Azores.

**OTA** - Azores Sustainable Tourism Observatory.

**SREA** - Azores Regional Statistics Service has an information system based on a local area network (LAN) platform. In order to guarantee its role as INE's Delegation, this service, in addition to the Regional Public Administration Network, is also integrated into INE's Computer Network of INE (National Statistics Institute).

# OTA's Annual Activity Report (2021-2022) - INSTO Network

Present Edition:

2nd Report

Publisher | OTA, Azores Portugal.

Contact | [geral@otacores.com](mailto:geral@otacores.com)

Website | <https://otacores.com/>

