ALGARVE SUSTAINABLE TOURISM OBSERVATORY

2024 ANNUAL REPORT

UN Tourism

INSTO — International Network of Sustainable Tourism Observatories

visit Algarve Portugal

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Foreword

There is a prevailing sense of optimism surrounding the tourism sector, a trend observed globally but particularly pronounced in the Algarve.

The year 2024 will be remembered as a landmark for Portuguese tourism, with record-breaking performances across multiple indicators, reinforcing the sector's vital role in the national economy. Yet, beneath this surface-level success, several red flags persist:

- While national tourism figures have reached unprecedented highs, it's noteworthy that the Algarve—despite remaining the country's top tourist region—has not yet recovered to its pre-pandemic (2019) levels.

- Despite the strong performance in 2024 and a promising outlook for 2025, a structural issue is becoming increasingly evident: a persistent shortage of human resources within the sector.

- Encouragingly, resident attitudes in the Algarve toward tourism remain largely positive, as supported by the data in this report. However, rising housing costs and living expenses pose a risk to this sentiment and could shift local perceptions in the near future.

- Early signs of strain were already visible in the Algarve during 2023, with the most significant impacts likely to emerge more clearly by 2025.

Initiatives like the Algarve Sustainable Tourism Observatory (AlgSTO) are crucial in this context. Their value lies in going beyond surface-level data, offering deeper insights into the dynamics driving these trends.

Ultimately, regional stakeholders hope that AlgSTO will serve not only as a monitor of current tourism conditions but also as a tool for understanding underlying challenges and guiding sustainable planning for the future.

Executive Summary

The Algarve Sustainable Tourism Observatory (AlgSTO) was created to track how tourism in the Algarve can grow in a more sustainable and higher-quality way. It helps local leaders make better decisions by using reliable data. Being part of the International Network of Sustainable Tourism Observatories (INSTO) is an important step in understanding tourism's impact on the region.

AlgSTO focuses on three main areas: economy, society and culture, and the environment. To measure these dimensions, it uses a small but important set of indicators, based on surveys given to residents (to understand how they feel about tourism), tourists (to learn about their experience), and companies (to study environmental impacts). Official data from Turismo de Portugal and the Statistics Portugal (INE) was also used.

In 2024, tourism in the Algarve continued to grow and showed strong results across different areas. This report looks at four main pillars of tourism sustainability: sociocultural, economic, environmental, and destination management.

Cultural Sustainability

Most residents in the Algarve are satisfied with tourism in their area. They see it as mostly positive. However, more people are starting to notice that local culture and traditions may be changing. Accessibility for people with disabilities is still limited, and improvements are needed in both accommodation and tourist attractions. However, the main factor of dissatisfaction among local residents in relation to Tourism has to do with the negative effect it has on the cost of living; particularly, on housing loans and housing rents.

Economic Sustainability

Tourism remains a key part of the Algarve's economy. In 2024:

- Revenue per hotel room rose by almost 5,5%;
- Total income from tourist stays increased by over 7,4%;
- Golf tourism continued to grow;
- More than 43% of residents surveyed worked in tourism during the high season.

Environmental Sustainability

Energy use by tourists went up in 2023, but their share of total energy use is still lower than in 2019. Most tourists still travel to the Algarve by plane, but the use of cars and public transport is increasing. Passenger numbers on inland waterways and at Faro Airport hit record levels in 2024, showing strong seasonal demand and the ongoing growth of tourism.

Destination Management and Tourist Satisfaction

Visitor satisfaction remains high, with over 80% of tourists rating their experience as "high" or "very high." Many also said they would recommend the Algarve and plan to return within five years. This shows the region has a strong and loyal tourist base.

Tourism in the Algarve is thriving, but it also brings challenges. To keep tourism sustainable, it is important to protect the environment, support local communities, and improve access for all visitors. The data in this report helps guide smart decisions for a better and more sustainable future for tourism in the region.

1. Algarve Profile and Tourist Activity

The Algarve is the southernmost region of Portugal occupying an area of 4 997 km2. With 467 475 residents it is the Portuguese region with the highest population growth in the last 10 years (+3.7%). Its population density is 93.5 per km^2. It is composed by sixteen municipalities divided into two natural regions – Barlavento and Sotavento - as illustrated on Figure 1.

It has a network of aerial, road, railroad and maritime infrastructures that, altogether, open the region to Europe and to the World. Its main doorway is Faro International Airport which on a national level is the second biggest in what concerns to air traffic. The A1 (to Lisbon) and A22 (regional) motorways are its main road accesses.

Considered main strong points:

- Mild weather conditions throughout the year, with over 3000 hours of sunshine and low rainfall;

- Around 200 km of coastline with coves, cliffs, sea caves, and rocky or wide golden sandy beaches, along with a clear, lukewarm and calm sea, which makes the Algarve region to be considered one of the best beach destinations in the world;

- Natural areas occupying 70% of the coastal extent and 37% of its territory inserted in natural reserves, nature parks or protected landscape areas, suggestive open-air activities throughout the whole year, like walking trails (Via Algarviana, GR15, Rota Vicentina), bicycle riding (Ecovia/EuroVelo 1) or birdwatching;

- A diversified tourism offers based on abundant accommodation facilities, transportation services and entertainment events throughout the year (wide range of hotel offer, recognized quality of its services, 40 golf courses considered to be among the best in the world, marinas and sports and cultural facilities);

Welcoming population, speaking several languages and always ready to unveil its history and traditions, arts and crafts and folklore; its gastronomy based essentially on the Mediterranean Diet, part of the UNESCO's World Heritage.

Figure 1. Map of Algarve Municipalities
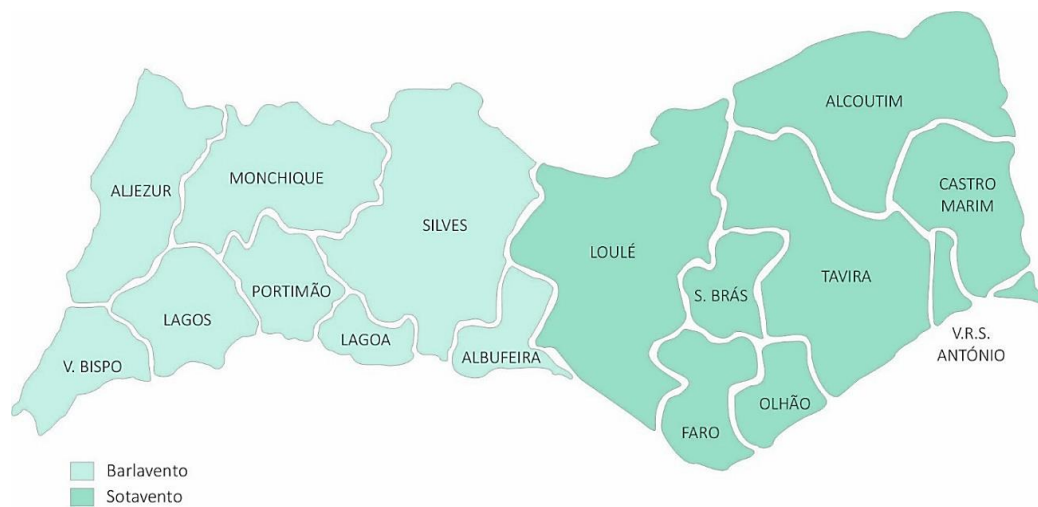
Source: Own elaboration.

The Algarve is a region where the tertiary sector has a big weight, therefore being the one that presents itself as the main employment generator, and where the highlights are the tourism sector companies.

In 2024, the percentage of active population working in the different activity sectors was consistent with the importance of tourism and the whole services sector: 3.5% in primary sector, 14.5% in secondary sector and 82.0% in the tertiary sector.

Concerning main tourism products/segments the Algarve has identified 19 as follows:

Sun and Sea;

Golf;

Meeting Industry & Corporate;

Nature Tourism;

Residential Tourism;

Gastronomy and Wine;

Cultural and landscaping Touring;

Health & well-being Tourism;

Sports Tourism;

Nautical Tourism;

Accessible Tourism;

Senior Tourism;

Cruises tourism;

Campervan Tourism;

Cinema and audio-visual Tourism;

Luxury Tourism;

LGBTQIA+;

Weddings;

Digital Nomads.

The Algarve Sustainable Tourism Observatory allows us to monitor the tourism development in the areas of economic, social and environmental sustainability. In the next chapter, it's explained in further detail each of these areas.

2. Measuring and Monitoring Tourism Sustainability Dimensions: Research Methodologies and Sustainability Indicators

This report considers information based on indicators referenced in the European Tourism Indicators System for Sustainable Destination Management (ETIS) regarding the eleven mandatory sustainability areas of tourism which constitute the AlgSTO's commitment assumed before the UNWTO-INSTO. The areas are: (1) Local satisfaction with tourism; (2) Economic benefits of the destination; (3) Employment; (4) Seasonality; (5) Energy management; (6) Water management; (7) Wastewater management; (8) Solid waste management; (9) Governance; (10) Accessibility and inclusion; (11) CO2 emissions.

AlgSTO focused on four dimensions of sustainability: cultural (due to the impacts of tourism on people and their well-being), economic (given the impacts on economic growth), environmental (attending to tourism impacts on natural resources) and destination management (which encompasses sustainable tourism management and tourists' satisfaction) (Figure 2).

Figure 2. Model of Sustainability Dimensions
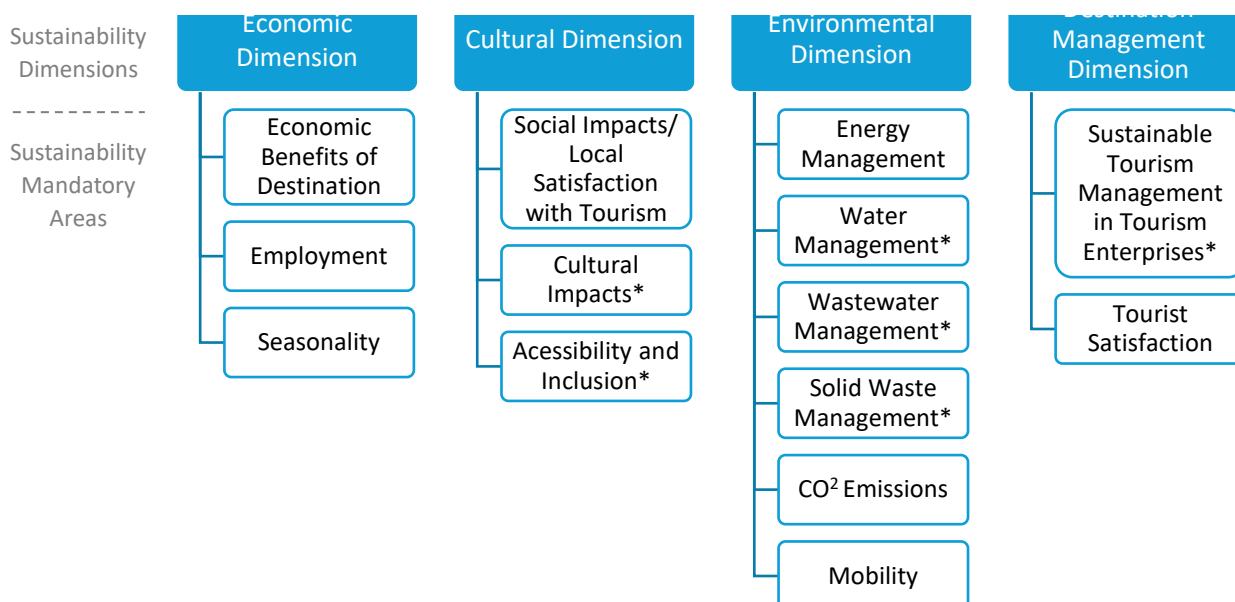
Source: Own elaboration.

Efforts have been developed to gather information for each indicator at regional and municipality levels. Yet, for some indicators, it was not possible to gather data at the municipality level. Additionally, as the data of some indicators has not been updated in 2023, those indicators were not included in the current report and are marked with an asterisk (*).

Data sources to feed the indicators present in this report are: Statistics Portugal (INE), Turismo de Portugal (TdP) and questionnaires applied to residents, tourists and companies in the tourism industry in the context of the MONITUR Project (presented in previous reports).

Tables 1-4 present detailed information on the indicators for each sustainability area/dimension, as well as information of data availability for the indicators presented in this report, including those for which there is no updated information for 2023. Further technical information for all indicators is provided in Annex A.

Table 1 presents the indicators of the cultural dimension of sustainability. The sustainability areas of Cultural Impacts and Accessibility and Inclusion do not present any information for the indicators, since the data is originated from a questionnaire for companies in the tourism sector, and the results of this study were not yet available by the time of publication of this report.

Table 1. Cultural Dimension Indicators

Cultural Sustainability Dimension			
Sustainability Areas	No. of Indicator	Description of Indicator	Information of Data Availability
Social Impacts/Local Satisfaction with Tourism	I_1	Percentage of residents satisfied with tourism	Algarve and Municipalities: High Season 2022, Low Season 2022/2023, High Season 2023
	I_2	Lodging capacity in tourist accommodation establishments, per 1000 inhabitants	Algarve: Annual (2022-2023)
Cultural Impacts	I_3	Percentage of residents that are satisfied with the impacts of tourism on the destination's identity	Algarve and Municipalities: High Season 2022, Low Season 2022/2023, High Season 2023

Accessibility and Inclusion	I_4	Percentage of tourist accommodation establishments that develop information actions on accessibility.	Planned for INSTO Report 2025
	I_5	Number of tourist attractions that are accessible to people with disabilities and/or participating in recognized accessibility information schemes	Algarve: updated until 2025
	I_6	Number of accommodation establishments accessible to people with disabilities	Algarve: updated until 2025

Source: Own elaboration.

The economic sustainability dimension accounts for three sustainability areas, specifically "Economic Benefits of the Destination", "Employment" and "Seasonality" (Table 2). In the production of this report, there was no updated data on the Gross Value Added in INE, a variable that is necessary to compute two indicators: I_{11} and I_{14}. Therefore, updated data on these indicators can be found in the previous report.

Table 2. Economic Dimension Indicators

Economic Sustainability Dimension			
Sustainability Areas	No. of Indicator	Description of Indicator	Information of Data Availability
Economic Benefits of the Destination	I_7	Revenue per available room in tourist accommodation establishments	Algarve and Municipalities: Annual (2022 – 2023)
	I_8	Average stay of international tourists	Algarve: Annual (2022-2024)
	I_9	Total income in tourist accommodation establishments	Algarve and Municipalities: Annual (2022 – 2023)
	I_{10}	Average number of Golf rounds	Algarve: Annual and Monthly (2022-2024)
Employment	I_{11}	Direct employment in tourism as a percentage of total employment in the region	High Season 2022; Low Season 2022/2023; High Season 2023
Seasonality	I_{12}	Number of nights spent in the region by tourists, per month	Algarve: Monthly (Jan 2022– Dec 2024) Municipalities: Annual (2022-2023)

	I$_{13}$	Seasonality rate	Algarve: Monthly (Jan 2022 – Dec 2024)
	I$_{14}$	Market share of the main source markets	

Source: Own elaboration.

The environmental sustainability dimension is composed of six sustainability areas, specifically "Energy Management", "Water Management", "Wastewater Management", "Solid Waste Management", "CO$_2$ Emissions" and "Mobility", as can be noted in Table 3. Due to lack of data collected through the implementation of specific questionnaires to tourism companies, information displayed in Table 3 concerns only to energy management, CO2 emissions and Mobility.

Table 3. Environmental Dimension Indicators

Environmental Sustainability Dimension			
Sustainability Areas	No. of Indicator	Description of Indicator	Information of Data Availability
Energy Management	I$_{15}$	Daily energy consumption of tourists vs. daily energy consumption of resident population	Algarve: Annual (2020-2023)
	I$_{16}$	Establishments that optimise energy consumption	Planned for INSTO Report 2025
	I$_{17}$	Percentage energy consumption produced by renewable sources vs. total energy consumption	Planned for INSTO Report 2025
	I$_{18}$	Percentage of companies adopting energy efficiency measures	Planned for INSTO Report 2025
Water Management	I$_{19}$	Daily water consumption by tourists, relative to daily water consumption by the resident population	Planned for INSTO Report 2025
	I$_{20}$	Establishments that optimise water consumption	Planned for INSTO Report 2025
	I$_{21}$	Percentage of tourist companies using recycled water	Planned for INSTO Report 2025
	I$_{22}$	Percentage of companies promoting efficient use of water in their operations	Planned for INSTO Report 2025
Wastewater Management	I$_{23}$	Percentage of companies that develop efficient waste management actions	Planned for INSTO Report 2025

Sustainability Area	No.	Description of Indicator	Information of Data Availability
Solid Waste Management	I$_{24}$	Establishments that separate waste	Planned for INSTO Report 2025
	I$_{25}$	Daily waste production by tourists, vs. daily waste production by resident population (Kg)	Planned for INSTO Report 2025
CO$_2$ Emissions	I$_{26}$	Percentage of tourists and tourists who use different means of transport to reach their destination	High Season 2022; Low Season 2022-2023; High Season 2023; High Season 2024
	I$_{27}$	Percentage of tourist companies involved in climate change mitigation activities - such as reducing CO2 emissions, low energy consumption systems, etc. - and "adaptation" responses and actions	Planned for INSTO Report 2025
Mobility	I$_{28}$	Movement of passengers on inland waterways	Ria Formosa and Guadiana: Monthly (2022-2024)
	I$_{29}$	Number of passengers boarded and disembarked at Faro Airport	Faro Airport: Monthly (2022-2024)

Source: Own elaboration.

The final dimension, Destination Management (Table 4), consists of the "Sustainable Tourism Management in Tourism Enterprises" and the "Tourists' Satisfaction" areas.

The data available in this sustainability dimension corresponds to the tourist satisfaction area, whose indicators come from the tourist questionnaire implemented between 2022 and 2024.

Table 4. Destination Management Indicators

Destination Management Dimension			
Sustainability Areas	No. of Indicator	Description of Indicator	Information of Data Availability
Destination	I$_{30}$	Percentage of companies and tourist establishments using voluntary	Planned for INSTO Report 2025

Manage ment Dimensi on		certification of environmental sustainability or corporate social responsibility	
	I_{31}	Percentage of establishments providing training on sustainable practices	Planned for INSTO Report 2025
	I_{32}	Percentage of tourists that are satisfied with their overall experience in the destination	High Season 2022, Low Season 2022/2023, High Season 2023; High Season 2024
	I_{33}	Indicators intended to measure tourists' experience such as memories of the experience, global perceived quality of the experience, intention to recommend the tourism destination	High Season 2022, Low Season 2022/2023, High Season 2023; High Season 2024
	I_{34}	Percentage of repeat/return visitors (within 5 years)	High Season 2022, Low Season 2022/2023, High Season 2023; High Season 2024

Source: Own elaboration.

3. Sustainability Areas and Indicators

3.1. Cultural Sustainability

3.1.1. Local Satisfaction with Tourism

This area is assessed by indirect measures of local satisfaction, such as the percentage of residents satisfied with tourism and the number of beds available in accommodation establishments.

3.1.1.1. Percentage of residents satisfied with tourism

The information for this indicator comes from questionnaires applied to residents in the 16 municipalities in the Algarve during High Season 2022, Low Season 2022/2023 and High Season 2023. Figure 3 illustrates the answers of the residents to the statement "Overall, I am satisfied with tourism in my municipality" in all three seasons. Globally, approximately half the respondents are satisfied or highly satisfied with the tourism in their municipality and around a third of residents have a neutral position regarding this question. No significant changes to highlight among the seasons, except for the decrease in the strong disagreement responses in the Low Season 2022/2023.

Figure 3. Percentage of residents satisfied with tourism in the region. Algarve.
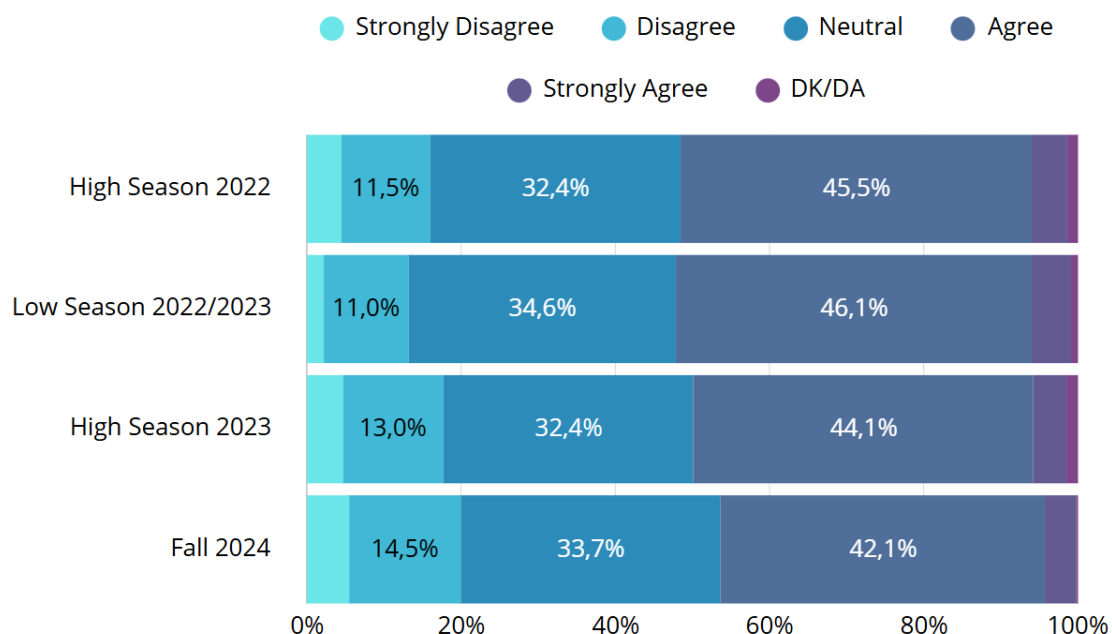
Source: Own elaboration.

3.1.1.2. Lodging capacity of tourism accommodation establishments per 1000 inhabitants

This indicator, defined as the number of beds per 1000 inhabitants, is highly relevant since it shows the relative importance of tourism lodging supply in relation to the resident population.

Table 5. Lodging capacity in tourism accommodation establishments, per 1000 inhabitants. Algarve, 2022-2023.

Indicator			
Lodging capacity of tourism accommodation establishments, per 1000 inhabitants	2022	2023	Var %
	280,1	277,6	-0,9%

Source: INE – National Statistics Institute.

In table 5 is shown the values for 2022 and 2023 for the Algarve region, and the variation in percentage, that shows a minor drop from 2022 to 2023. Nevertheless, the accommodation supply is very high – 277,6 beds per one thousand inhabitants.

Figure 4 presents the distribution of the accommodation by municipality, where is highlighted the predominance of Albufeira as an accommodation centre.

Figure 4. Lodging capacity in tourism accommodation establishments, per 1000 inhabitants. Algarve and Municipalities, 2023.
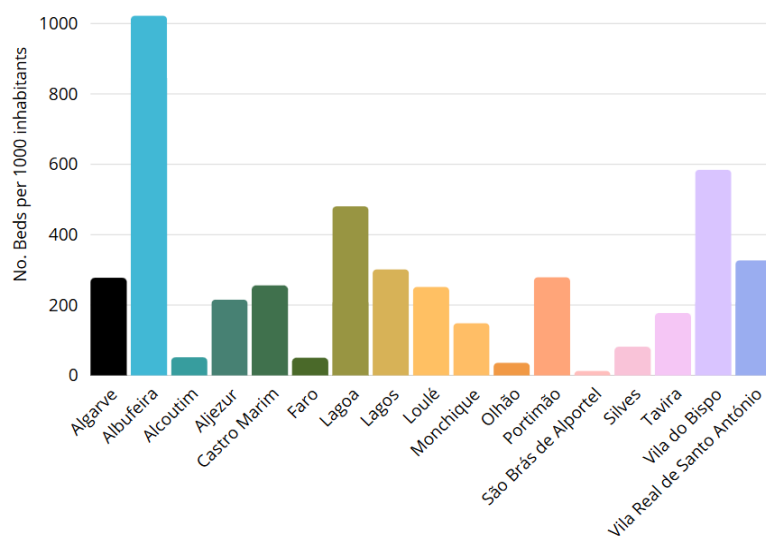
Source: INE – National Statistics Institute.

3.1.2. Cultural Impacts

The cultural impacts of tourism reflect in what degree is tourism affecting the destination's culture, identity and cultural heritage. To monitor this area, it was chosen the indicator originated from questionnaires applied to residents of the Algarve, that is presented next.

3.1.2.1. Percentage of residents that are satisfied with the impacts of tourism on the destination's identity.

Figure 5 shows the perceptions of residents in what concerns the loss or change in traditions and cultural identity in the Algarve in three seasons when the questionnaire was applied: High Season 2022, Low Season 2022/2023 and High Season 2023. Globally, most respondents believe that there is no loss/change in traditions or assume a neutral position in this topic.

Answers provided in either High Season 2022 or Low Season 2022/2023 are not distinguishable from each other. However, in High Season 2023 there is a slight increase of agreement answers. This indicates that more residents agree that there is some loss or change in traditions and cultural identity in the region.

Figure 5. Percentage of residents satisfied with the impacts of tourism in cultural traditions and destination's identity. Algarve.
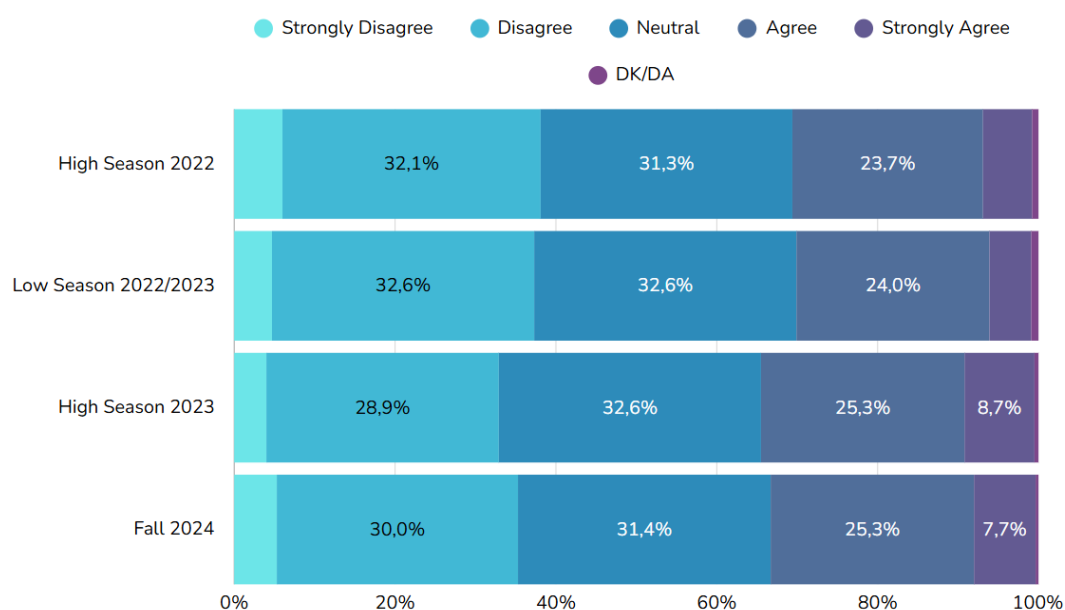
Source: Own elaboration.

3.1.3. Accessibility and Inclusion

Acessibility is a key concern when it comes to chosing a tourist destination, as it allows tourists with disabilities to get the most possible complete experience of the destination.

This section covers accessible accommodation for tourists with reduced mobility, as well as accessible tourist attractions.

The information for the following indicators is originated from the project TUR4all, organised by IMPULSA Igualdad and the Vodafone Foundation. The platform TUR4all compiles establishments of various categories, all around the globe where accessibility measures are adopted. In future reports, this data will be complemented by a survey conducted to companies in the tourism sector.

3.1.3.1. Number of tourist attractions that are accessible to people with disabilities and/or participating in recognized accessibility information schemes

According to the platform TUR4all, for this indicator it was considered the atractions that fell in the category of monuments, leisure and culture. For the purpose of this report, it was only considered the resources checked by experts, since this is an open access platform and therefore visitors can add resources that they consider to have any accessibility measures. In table 6, It is discriminated the number of resources from each category for the Algarve region, with updated information until the composition of this report.

Table 6. Tourist attractions that are accessible to people with disabilities. Algarve.

Indicator			
Number of tourist attractions that are accessible to people with disabilities	Monuments	Culture	Leisure
	11	41	25

Source: TUR4ALL Platform.

Within the section of Monuments, it is considered religious monuments, palaces, archeological sites and historical squares. On the other hand, the Culture section is dedicated to museums, cultural centres and libraries. Finally, in the Leisure section, is considered zoos, amusement parks, casinos, among others.

The numbers suggest that there is still a significant amount of attractions that have not yet been identified as accessible or do not meet the requirements of accessibility.

3.1.3.2. Number of accommodation establishments accessible to people with disabilities

Table 7 presents the number of accommodation establishments that have accessible conditions. More specifically, 77 accommodation establishments in the region present at least one room that is adapted for people with reduced mobility (RM). From these, 42 establishments also have an adapted bathroom for said individuals.

Once again, considering the whole set of accommodation establishments in the region, this information represents a minor portion of the total of lodging facilities. Nevertheless, future reports will be richer in matters of accessibility and inclusion.

Table 7. Accommodation establishments accessible to people with reduced mobility. Algarve

Indicator		
Accommodation establishments accessible to people with disabilities (No.)	Room adapted for people with RM	Bathroom adapted for people with RM
	77	42

Source: TUR4ALL Platform.

3.2. Economic Sustainability

3.2.1. Economic Benefits of the Destination

To measure the economic benefits of tourism in the region, only indicators that constitute indirect measures have been addressed. These are the revenue per availabe room in tourist accommodation establishments, the average stay of international tourists, total income in tourism accommodation establishments and the average number of golf rounds in the region.

3.2.1.1. Revenue per available room in tourist accommodation establishments

This indicator represents the ratio between revenue from accommodation and the number of available rooms in the Algarve region, between the years 2022 and 2024, as illustrated in Table 8. An increase of 5.5% was registered between 2023 and 2024, reaching an average revenue per available room of 74.40 euros. However, these results should be viewed with caution, since the value of the indicator depends on both the revenue per room actually used and the occupancy rate of the establishments.

Table 8. Revenue per available room in tourist accommodation establishments. Algarve, 2022-2024.

Indicator				
Revenue per available room in tourist accommodation establishments	2022	2023	2024	Var % (23/24)
	64,10€	70,30€	74,4€	5,5%

Source: INE – National Statistics Institute.

Figure 6 shows the distribution of the revenue per available room among the municipalities in the Algarve. Loulé registered the highest value of RevPar, with approximately 80 euros per available room. The lowest revenue is located in Alcoutim, with a value of 25 euros. These results are expected, due to the differences in terms of tourism activity and intensity when comparing the two cities.

Figure 6. Revenue per available room in tourism accommodation establishments. Algarve and Municipalities, 2023.
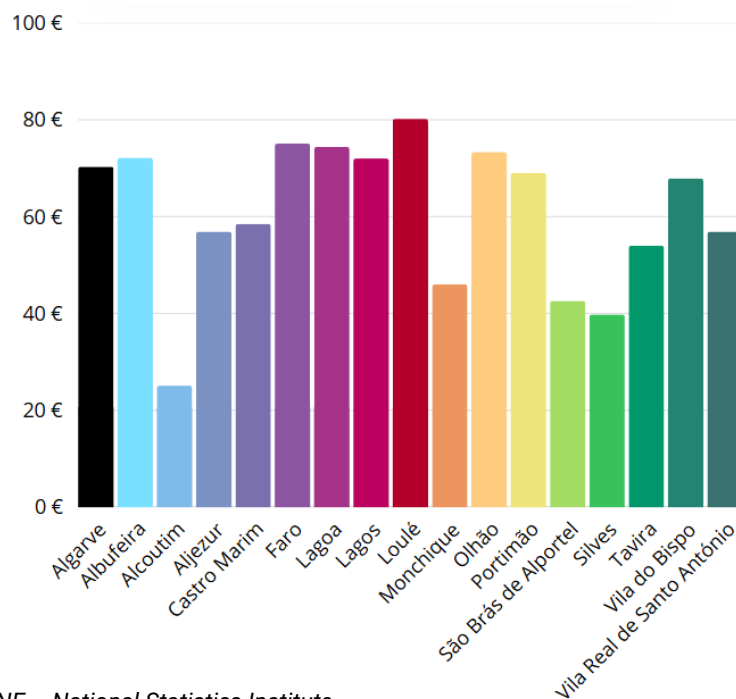
Source: INE – National Statistics Institute.

3.2.1.2. Average stay of international tourists

This indicator relates the number of tourists with the number of overnight stays in tourist accommodation establishments. It is an important instrument for analysing economic sustainability. Information on this indicator is provided for the region of Algarve on an annual basis for the period 2022-2023 and reported in Table 9, and on a municipal level in Figure 7.

Table 9. Average stay of international tourists. Algarve, 2022-2024.

Indicator				
Average stay of international tourists in the Algarve	2022	2023	2024	Var % (2023/2024)
	4.21	4.25	4.22	-0.7%

Source: INE – National Statistics Institute.

Roughly speaking, international tourists spend on average around four nights in the Algarve (Table 9).

This value had a slight decrease between 2022 and 2023. Figure 7 displays the distribution of average overnight stays among the 16 municipalities of the Algarve. Vila Real de Santo António presents the highest average stay in 2023, followed by Albufeira, Portimão and Lagoa.

Figure 7. Average stay of international tourists. Algarve and Municipalities, 2023.
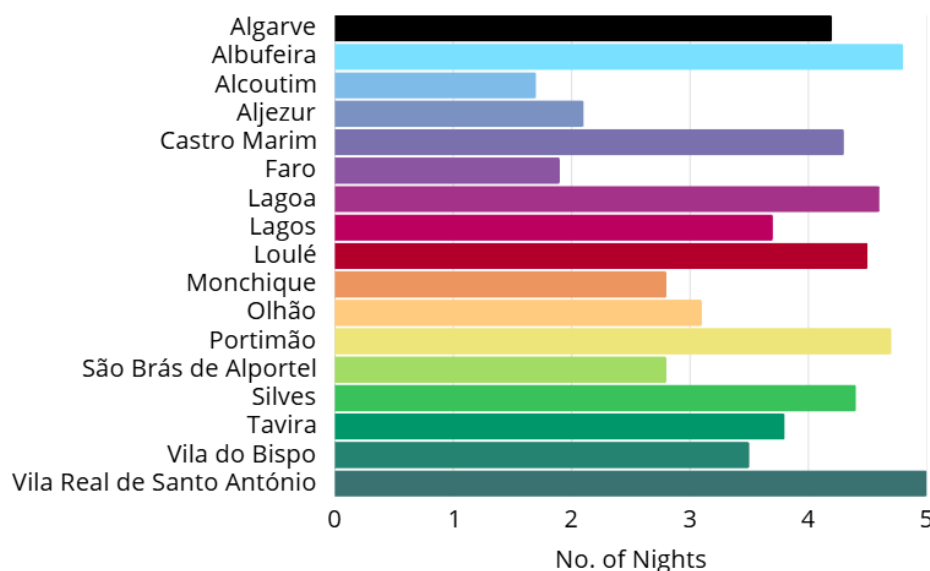
Source: INE – National Statistics Institute.

3.2.1.3. Total income in tourist accommodation establishments

This indicator measures the total income generated in tourist accommodation establishments in the Algarve, in the years of 2022 and 2023. The distribution by municipality for 2023 is also shown in Figure 8. This information is crucial to understand the economic gain in accommodation establishments in the tourism sector in the region, and to understand its behaviour in the past recent years.

In 2024, the Algarve registered income generation of approximately 1 700 million euros regarding lodging facilities dedicated to tourism, an increase of 7.35% when compared with the previous year (Table 10). This value shows the economic impact that the tourism sector has in the region.

Table 10. Total income in tourist accommodation establishments. Algarve, 2022-2024.

Indicator				
Total income in tourist accommodation establishments (in thousands of euros)	2022	2023	2024	Var (2023/2024)
	1 421 504€	1 583 330€	1 699 735€	7.35%

Source: INE – National Statistics Institute.

Figure 8 shows the value presented in Table 10, in euros, distributed among the municipalities of the Algarve that presented the largest share. It is possible to highlight Albufeira as the main absolute contributor to the accommodation sector, followed by Loulé, Portimão and Lagoa.

Figure 8. Total income in tourist accommodation establishments. Algarve and Municipalities, 2023.
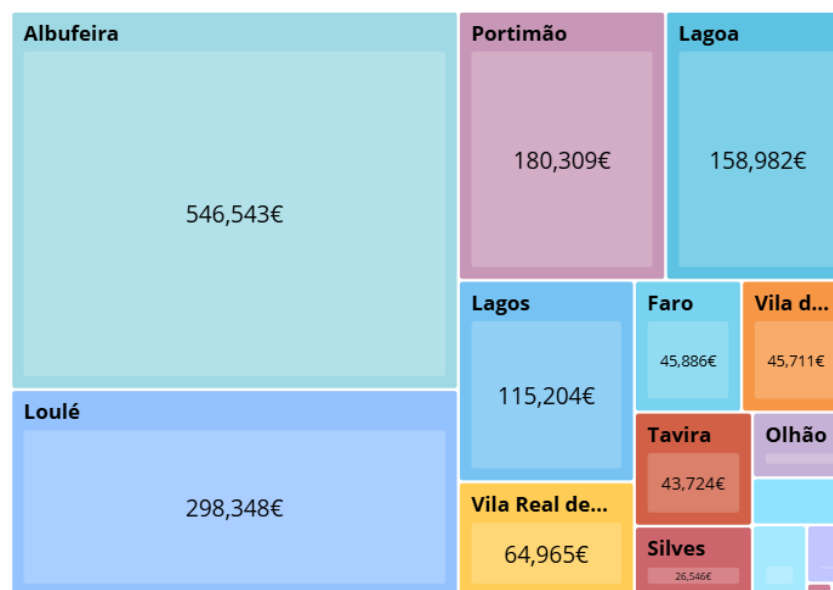
Source: INE – National Statistics Institute.

3.2.1.4. Average number of Golf rounds

In addition to the activities related to sand and sun in the Algarve, golf is a sport that is very popular in the region and practiced by tourists, with more than half the recipients being international players. Table 11 shows the average annual golf rounds in the region, with a steady increase since 2022.

Table 11. Average number of golf rounds. Algarve, 2022-2024.

Indicator	2022	2023	2024	Var (2022-2023)	Var (2023/2024)
Average number of Golf rounds in the Algarve region	36 672	37 850	39 207	3.2%	3.6%

Source: Tourism of Portugal.

Figure 9 shows the seasonality effect presented in the practice of this sport in 2024, with the peak value matching the beginning of low season in the sand and sun tourism activity. The best month was October, with a record value of 4782 golf rounds in the region.

Figure 9. Average number of golf rounds. Algarve, January 2024 - December 2024
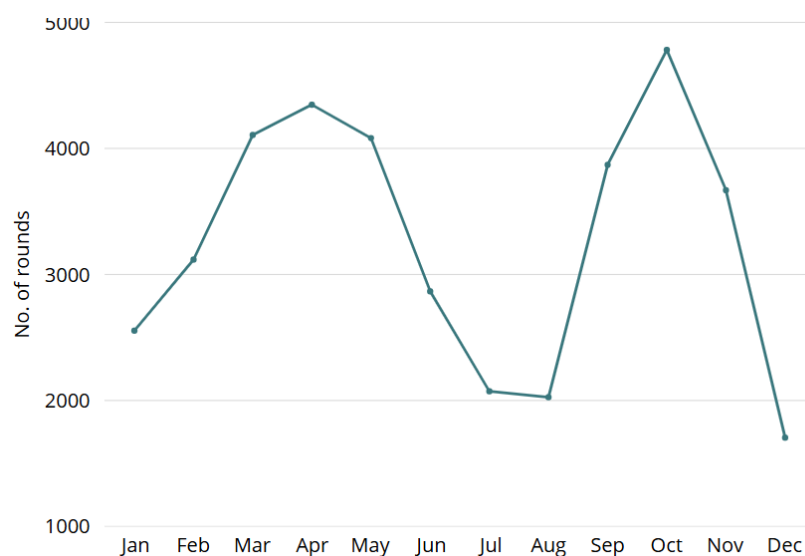
Source: Tourism of Portugal.

3.2.2. Employment

3.2.2.1. Direct employment in tourism as a percentage of total employment in the region

Due to lack of published data to support the application of this indicator, the results of the questionnaire implemented among local residents in the region for the period of 2022-2024 were used.

Data is presented in Table 12 presents the data, showing a relative increase of tourism workers when comparing the results of High Season 2022 and High Season 2023. The lower value in Low Season 2022/2023 can be due to the nature of collection of the inquiries and the season of their application – there are more workers of the tourism sector active during High Season than in Low Season.

Table 12. Residents that work in the tourism sector. Algarve.

Indicator			
Percentage of residents that work in the tourism sector	High Season 2022	Low Season 2022/2023	High Season 2023
	39.8%	36.7%	43.6%

Source: Own elaboration.

3.2.3. Seasonality

3.2.3.1. Number of nights spent in the region by tourists, per month

This indicator considers the total number of night beds in all types of tourist accommodation. Direct use of secondary data has been made to apply this indicator, which is available on a monthly basis from 2022 to 2024 for the region (Figure 10).

In previous reports, it was noted a growth from 2021 to 2022 due to the lifting of health constraints in terms of mobility. This has been followed by subsequent increases in 2023 and 2024. On the other hand, a simple observation of Figure 10 allow us to conclude that the seasonal pattern remained stable for the three years covered by the observation period.

Figure 10. Number of nights in tourism accommodation establishments. Algarve, monthly data, 2022-2024.
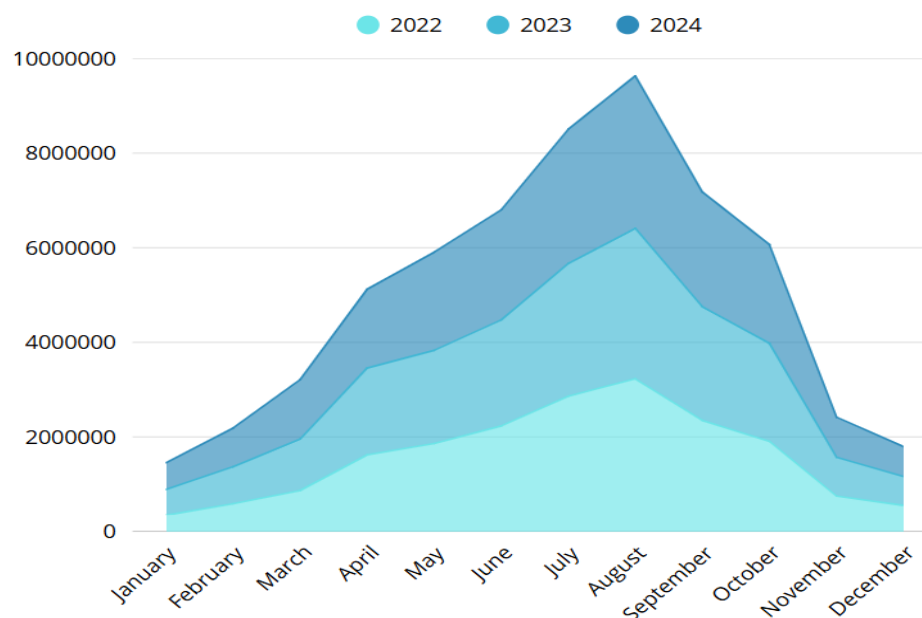
Source: INE – National Statistics Institute.

3.2.3.2. Seasonality rate

This indicator relates the number of overnight stays that tourists spend in accommodation establishments in the region in just three months of the annual cycle (July, August and September), which defines the high season in each year, with the total number of overnight stays spent by tourists in the entire year.

The year of 2024 registered a historic value, reaching the lowest value of this indicator since 2010 (oldest year with information regarding this indicator). This reflects the decreasing level of seasonality that has been present in the region – tourist activity is spreading throughout the year, thanks to initiatives and activities publicized. This can be beneficial to the region, as it diminishes the effects of massification of tourism and tourist intensity (Table 13).

Table 13. Seasonality Rate. Algarve, 2022-2024.

Indicator					
Seasonality Rate (%)	2022	2023	2024	Var pp	Var pp
	44.0%	41.2%	40.9%	-2.8	-0.3

Source: INE – National Statistics Institute.

3.2.3.3. Market share of the main source market

The top ten tourism markets of 2023 are presented in the graph in Figure 11 compared to those in 2024. Between 2023 and 2024, there was a significant decrease in what concerns the domestic market (minus 5.2 percentual points). This can be explained by the increase of prices and accommodation. Spain showed the same downward trend, as well as France. The USA market is highlighted, given its strong increase and bigger market share, with 3.5% in 2023. The Dutch market, along with those of United Kingdom and Ireland, presented significant increases in 2024 when compared with the previous year.

Figure 11. Market share in the main source markets. Algarve, 2022-2023.
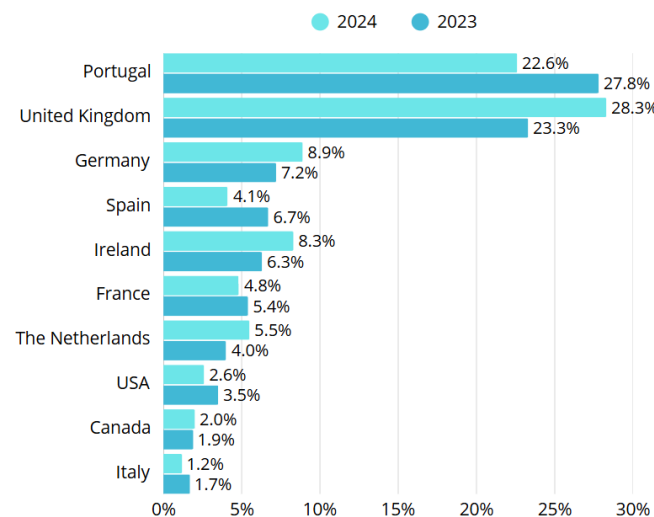
Source: INE – National Statistics Institute.

3.3. Environmental Sustainability

Tourism and environment are inter-connected. The environment of a tourist destination, its socio-cultural attributes and resources constitute the basic background for the evolution, growth and development of tourism in the destination area. Increasing tourism activities in a destination often results in overuse and degradation of the natural environment and other resources of tourism, which will eventually lead to a decline in the growth of tourism and loss of tourism value for the destination.

The goal of environmental sustainability is to preserve natural resources and to develop alternative sources of power while reducing pollution and harm to the environment.

For monitoring purposes, environmental sustainability is measured through natural resources management, such as energy and water, waste management, mobility and air quality and noise.

3.3.1. Energy Management

To analyse energy management in the region, the indicator used in this report is the daily electricity consumption of tourists vs. daily electricity consumption of resident population.

To reflect this information, it was used the domestic electricity consumption to represent the consumption of residents in the Algarve and the electricity consumption regarding the accommodation sector and F&B sector to mirror the tourists' consumption. Therefore, the indicator is the ratio of tourists' electricity consumption in relation to residents' electricity consumption.

3.3.1.1. Daily eletricity consumption by tourists, relative to daily eletricity consumption by the resident population

Table 14 is clearly shows an increase of the ratio of energy consumption by tourists in 2023 when compared to 2020. This is justified by the end of the travel restrictions imposed by the pandemic of COVID-19 and therefore, a greater inflow of tourist activity.

However, when comparing 2019 to 2023, there is still a significant decrease of 5.3 that is explained by a greater increase in consumption when compared with the increase in consumption in accommodation and F&B sectors (table 14). Therefore, some caution should be exercised in considering these results, as it is highly likely that they are contaminated by the occurrence of the Covid-19 Pandemic. In any case, the results suggest the occurrence of a process of recovery to pre-pandemic figures.

Table 14. Ratio of daily energy consumption by tourists in relation to residents. Algarve, 2022-2023.

Indicator	Values		Variations	
Percentage of daily energy consumption by tourists in relation to residents	2020	2023	2019-2023	2022-2023
	28.1	36.0	-5.3	+1.2

Source: DGEG Portugal.

3.3.2. CO_2 Emissions

To interpret the data from this sustainability area the different means of transportation used by tourists to reach their tourism destination are analysed.

3.3.2.1. Percentage of tourists who use different means of transport to reach their destination

Presented in Figure 12 are the answers of tourists to the different means of transportation used to reach the Algarve.

Since the data of this indicator comes from questionnaires applied in the Faro Airport, the responses answers may be biased, given that in every season considered, most of the respondents came to the Algarve by plane. Nevertheless, from Low Season 2022/2023 to High Season 2024, there was an increase in the use of car as the mai transportation, as well as public transportation, reaching the highest value of 3.3% in High Season 2024.

Figure 12. Percentage of tourists that use different means of transportation. Algarve.
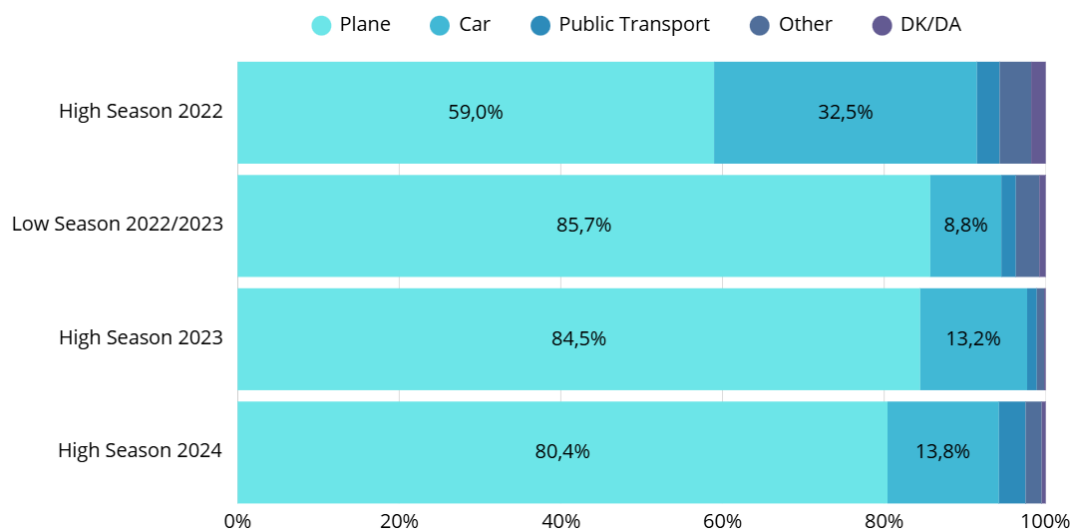
Source: Own elaboration.

3.3.3. Mobility

As the main economic activity in the Algarve, tourism involves the movement of people and goods, which exerts pressure over the territory, which in turn leads to the necessity of monitoring. The indicators used to monitor mobility are the movement of passengers on inland waterways and the number of passengers boarded and disembarked at Faro Airport.

3.3.3.1. Movement of passengers on inland waterways

The first indicator measures the number of passengers moving on inland waterways. Inland waterway is the regular service performed by public transport, obeying itineraries, schedules or minimum frequencies and pre-fixed rates.

At the regional level, beaches considered for this indicator are Ria Formosa (Faro - Faro island, Deserta Island and Farol island; Olhão - Culatra Island and Armona island; Tavira - Tavira island, Quatro Águas –Tavira island; Fuzeta –Armona island; Sta. Luzia - Terra Estreita; Cabanas – Cabanas island) and beaches located by the Guadiana River (Vila Real de Santo António in Portugal and the beach of Ayamonte, in Spain).

Figure 13 reports monthly data of the total movement of passengers on the above inland waterways for the period between 2022 and 2024. A seasonal pattern can be readily noticed from the inspection of the Figure 13.

Moreover, it is also clear the increasing values of the number of passengers in the third quarters, which corresponds to the peak tourist season, as well as a progressive increase of movement of passengers. In 2024 it was registered the highest value of this indicator in the period observed, reaching almost two million passengers in the third quarter of that year.

Figure 13. Movement of passengers in inland waterways. Ria Formosa and Guadiana, 2022-2024.
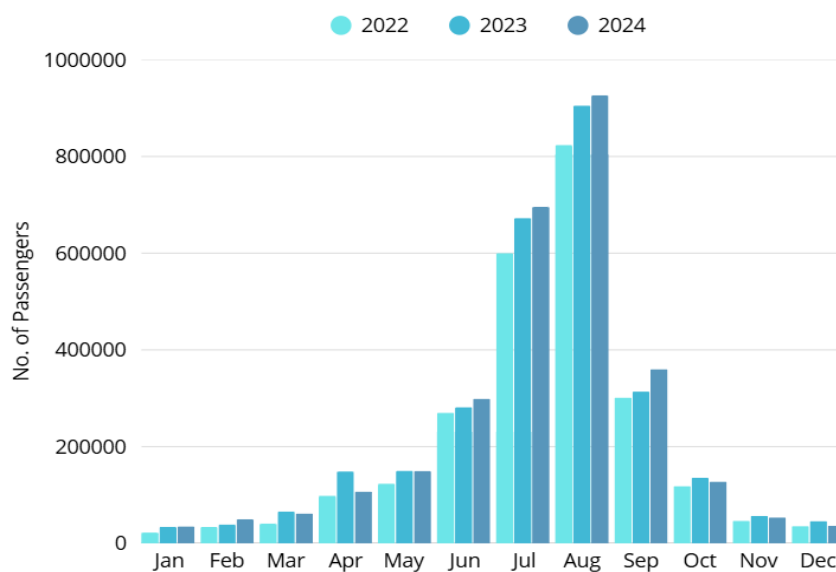
Source: INE – National Statistics Institute.

3.3.3.2. Number of passengers boarded and disembarked at Faro Airport

The second indicator provides the number of passengers embarked and disembarked at Faro Airport, covering the nature of the traffic (inland, territorial and international) between the years of 2022 and 2024, reported in Figure 14.

The patterns are similar in boarded and disembarked data. There is a visible increase in volume of travellers over the years, especially the years 2022 to 2023, with the pressure being highest in the 3rd quarters, this confirming once again the strong seasonality of the tourist activity. Once again 2024 registered historic figures, with the highest values of boarded and disembarked passengers in the period considered. Again, these results should be taken with caution, as not all passengers at the Airport are tourists.

Figure 14. No. Passengers boarded and disembarked at Faro Airport. January 2022 - December 2024.
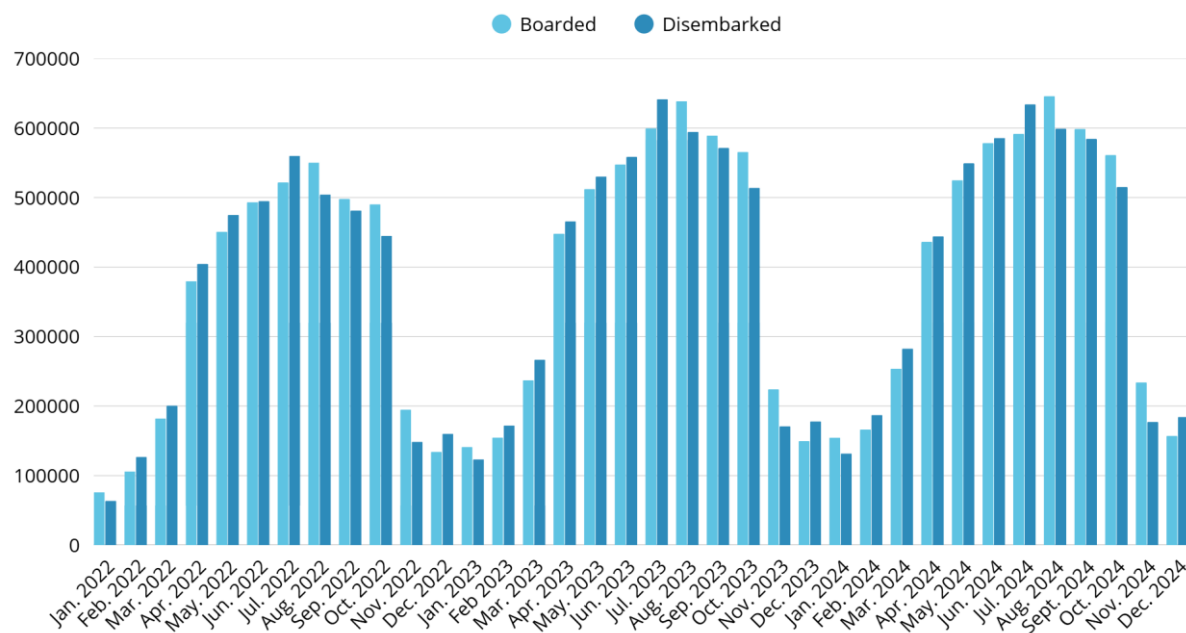
Source: INE – National Statistics Institute.

3.4. Destination Management

For monitoring purposes, Destination Management sustainability is measured in this report through indicators within tourism satisfaction.

3.4.1. Tourist Satisfaction

In this sustainability area, several indicators are considered and originate from the tourist questionnaire implemented in the years 2022 to 2025 (still no available data from 2025).

3.4.1.1 Tourist Satisfaction and overall perceived quality of the experience

Table 15 presents the values of two indicators related to tourist satisfaction and quality of tourism services, between High Season 2022 and High Season 2024.

Regarding the first indicator, the overall satisfaction with the destination, in all seasons this indicator presents a satisfaction around 80% - this means that 80% of respondents answered "High" or "Very High" when asked about their degree of satisfaction of their experience in the Algarve. The second indicator presents similar values. However, in this case, values increased on a regular basis reaching a maximum of 84.8% in the year of 2024 (Table 15).

Table 15. Overall satisfaction with the destination and perceived quality of the experience. Algarve.

Indicator	*Values*			
Percentage of tourists that are satisfied with their overall experience in the destination	High Season 2022	Low Season 2022/2023	High Season 2023	High Season 2024
	82.3%	78.4%	80.2%	84.3%
Percentage of tourists with a positive overall perceived quality of the experience	76.8%	80.2%	81.7%	84.8%

Source: Own elaboration.

3.4.1.2. Intention to revisit and recommend the destination

Table 16 presents the indicators related with the intention to recommend and to revisit the destination.

Across all seasons, at least 94% of the respondents intend to recommend the tourism destination to friends and family (Table 16), which consonants with the high satisfaction rate observed in the previous table.

In what concerns the revisitation of the destination, high values are registered in all seasons, however in high season 2023 there was a significant drop when compared with low season 2022/2023. Nevertheless, the last season presented a superior value, of 83.8% (Table 16).

Table 16. Intention to recommend and to revisit the tourism destination within 5 years. Algarve.

Indicator	Values			
	High Season 2022	Low Season 2022/2023	High Season 2023	High Season 2024
Intention to recommend the tourism destination	94.7%	93.4%	94.0%	95.2%
Intention to revisit the tourism destination within 5 years	86.3%	87.5%	80.8%	83.8%

Source: Own elaboration.

4. Conclusions

This section of the report highlights the Algarve's progress and challenges in making tourism more sustainable, focusing on four key areas: sociocultural, economic, environmental, and destination management.

The ambition of achieving more sustainable competitiveness and more competitive sustainability is part of the regional strategic vision for 2030, that incorporates an incessant search for qualification and sustainability of the Algarve destination.

In what concerns sociocultural sustainability, most residents in the Algarve are satisfied with tourism in their municipalities. They generally feel that tourism is positive, although a growing number are starting to believe that local traditions and cultural identity may be changing. Still, the most worrying aspect related to the socio-cultural dimension of tourism is the relatively high level of dissatisfaction among local residents. This dissatisfaction is essentially explained by the high prices of ordinary goods and services, as well as high rental and housing prices. Accessibility is also improving, but there is still a long way to go. For example, only a small portion of accommodation and tourist attractions are fully accessible for people with disabilities. Future reports plan to collect more data in this area to better understand and improve accessibility.

Regarding economic sustainability, tourism continues to be a strong driver of the Algarve's economy. Revenue per available room in accommodation grew by nearly 10% from 2022 to 2023. Total income in tourist accommodation also increased by over 11%. Golf tourism, a key product in the region, has been growing steadily. However, the average stay of international tourists decreased slightly, which might suggest changes in travel behaviour or rising costs. Employment in tourism is significant, with over 43% of residents surveyed in 2023 working in the sector during the high season. Seasonality, while still representing one of the most unpleasant characteristic associated with tourism activity in the region, and a huge cost to the Economy of the Algarve, is showing slight signs of decline, with tourism becoming more evenly spread throughout the year. This helps reduce pressure on infrastructure during the summer months and supports year-round employment.

The environmental data show a mixed picture. Tourists are using more energy compared to previous years, although their share of overall energy use is still lower than in 2019.

Transportation is a major factor, with most tourists still arriving by plane. However, there has been a small increase in the use of cars and public transport. Mobility data also show that both inland waterways and Faro Airport experienced record numbers of passengers in 2024, confirming the strong seasonal demand and overall growth of the tourism sector.

Tourists continue to have positive experiences in the Algarve. Satisfaction with the destination remains high, with over 80% of visitors rating their experience as "high" or "very high." The quality of the tourism experience is also improving, and most tourists say they would recommend the Algarve and plan to return within five years. This indicates a strong reputation and loyal visitor base.

Tourism in the Algarve is performing well in many areas. The region is managing to attract more visitors, increase revenue, and maintain high levels of satisfaction among both residents and tourists. However, it also faces important challenges, especially in ensuring that growth does not harm local culture, the environment, or quality of life.

The data in this report helps decision-makers understand where improvements are needed. Continued investment in accessibility, environmental protection, and the well-being of residents will be key to keeping tourism in the Algarve sustainable and successful for years to come.

5. Annex A: Indicator Technical Notes

Table A1: Percentage of residents satisfied with tourism

Algarve Indicator	Tourist Satisfaction
UNWTO Mandatory Area	Local Satisfaction with tourism
ETIS section	C. Social and cultural impact
ETIS criterion	C.1 Community /social impact
ETIS indicator	C.1.1 Number of tourists/visitors per 100 residents
Description	Tourism Satisfaction. Measures the responses of residents in what concerns the satisfaction with tourism in their municipality of residence.
Concepts	Tourist Satisfaction.
Approach/Calculation	NA
Geographic level and periodicity	NUTSII and Municipality: High Season 2022, Low Season 2022/2023 and High Season 2023.
Data source(s)	• MONITUR Questionnaires
Limitations/issues	• Limited period of study;

Table A2: Lodging capacity in tourist accommodation establishments, per 1000 inhabitants

Algarve Indicator	Number of beds available in tourist accommodation establishments per 1000 residents
UNWTO Mandatory Area	Local Satisfaction with tourism
ETIS section	C. Social and cultural impact
ETIS criterion	C.1 Community /social impact
ETIS indicator	C.1.3 Number of beds available in commercial accommodation establishments per 1000 residents.
Description	Number of beds available in tourist accommodation establishments per 1000 residents.
Concepts	Tourist accommodation establishment: Establishments that provide short-term accommodation services for remuneration, operating in one or more buildings or facilities. Hotels, local accommodation, campsites, youth hostels, tourism in rural areas and lodging tourism.
Approach	Composite indicator based on secondary data. (Lodging capacity tourist acc. / total residents) * 1000
Geographic level and periodicity	NUTSII: Annual (2017-2021) By Municipality: (2017-2021)
Data source	• INE, Guests stays and other data on hotel activity survey. Indicator: Lodging capacity (No.) in tourist accommodation establishments by Geographic localization (NUTS - 2013) and Type (tourist accommodation establishment); Annual • Lodging capacity in tourist accommodation establishments by 1000 inhabitants (No.) by Geographic localization (NUTS - 2013); Annual • From the above two sources data is available for the years 20142018 only, hence we obtained the remaining data from the tables provided by 'Tourism Statistics' following the individual links for each year: • https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publica coes&PUBLICACOESpub_boui=5596816&PUBLICACOEStema=00 &PUBLICACOESmodo=2 • https://www.ine.pt/ngt_server/attachfileu.jsp?look_parentBoui =416437385&att_display= • INE, Annual estimates of resident population. Indicator: Resident population (No.) by Place of residence (NUTS - 2013), Sex and Age group; Annual
Limitations/Issues	Data for the municipalities does not capture the full scope of accommodation types. Campsites, holiday camps and youth hostels are not included.

Table A3: Resident perception on cultural identity

Algarve Indicator	Residents perception on cultural identity
UNWTO Mandatory Area	Local Satisfaction with tourism
ETIS section	C. Social and cultural impact
ETIS criterion	C.5 Protecting and enhancing cultural heritage, local identity and assets
ETIS indicator	C.5.1. Percentage of residents that are satisfied with the impacts of tourism on the destination's identity
Description	
Concepts	Tourist accommodation establishment: Establishment that provides short-term accommodation services for remuneration, operating in one or more buildings or facilities. Types: hotels, local accommodation, tourism in rural areas and lodging tourism.
Approach/Calculation	(No.residents satisfied with tourism impacts in cultural heritage and identity)/ (No. total residents)
Geographic level and periodicity	NUTSII: High Season 2022, Low Season 2022/2023, High Season 2023, Fall 2024
Data source(s)	• MONITUR Questionnaires
Limitations/issues	• Limited period of study;

Table A4: Percentage of tourist attractions that are accessible to people with disabilities

Algarve Indicator	Percentage of tourist attractions that are accessible to people with disabilities
UNWTO Mandatory Area	Inclusion/Accessibility
ETIS section	C. Social and cultural impact
ETIS criterion	C.4. Inclusion/Accessibility
ETIS indicator	C.4.4. Percentage of tourist attractions that are accessible to people with disabilities and/or participating in recognised accessibility information schemes
Description	Measures the number of tourist attractions accessible to people with disabilities
Concepts	
Approach/Calculation	*NA*
Geographic level and periodicity	NUTSII: 2024
Data source(s)	• Tour4all platform
Limitations/issues	• Open access platform, and therefore lacks information.

Table A5: Percentage of rooms in commercial accommodation establishments accessible for people with disabilities

Algarve Indicator	Percentage of rooms in commercial accommodation establishments accessible for people with disabilities
UNWTO Mandatory Area	Social and Cultural Impact
ETIS section	C. Social and cultural impact
ETIS criterion	C.4 Inclusion/accessibility
ETIS indicator	C.4.1. Percentage of rooms in commercial accommodation establishments accessible for people with disabilities
Description	Percentage of rooms in commercial accommodation establishments accessible for people with disabilities.
Concepts	
Approach/Calculation	NA
Geographic level and periodicity	NUTSII: 2024
Data source(s)	• Tour4ALL Platform
Limitations/issues	• Open access platform and therefore lacks information.

Table A6: Revenue per available room

Algarve Indicator	Revenue per available room
UNWTO Mandatory Area	Tourism Enterprise Performance
ETIS section	B. Economic Value
ETIS criterion	B.2 Tourism Enterprise Performance
ETIS indicator	NA
Description	Revenue per available room in tourism accommodation establishments, in euros
Concepts	REVENUE PER AVAILABLE ROOM: Indicator that represents the relation between the revenue from accommodation and the number of available rooms, in the reference period.
Approach/Formula	Rev Par = Lodging incomes in the year/ Sum(Number of rooms available in the month * Number of days in the month)
Geographic level and periodicity	NUTSII Annual (2007-2021)
Data source(s)	https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_public acoes&PUBLICACOESpub_boui=384536089&PUBLICACOESmo do=2
Limitations/issues	Classification of touristic establishments is consistent from 2013 onwards. Till 2012 touristic accommodation establishments did not include rural and habitational tourism, local accommodation, camping sites, youth hostels, lodges or summer camps. Moreover, each year had different components in the definition.

Table A7: Average stay of tourists

Algarve Indicator	Average stay of tourists
UNWTO Mandatory Area	Tourism Enterprise Performance
ETIS section	B. Economic Value
ETIS criterion	B.2 Tourism Enterprise Performance
ETIS indicator	B.2.1 Average length of stay of tourists (nights)
Description	This indicator, by relating the number of tourists with the number of overnight stays in tourist accommodation establishments, constitutes an instrument which is an important factor in monitoring tourism seasonality and analysing economic/environmental sustainability.
Concepts	Tourist Accommodation establishments = hotels + apartment hotels + tourist villages + lodging houses + Inns + rural tourism + lodging tourism + local accommodation
Approach/Formula	Composite indicator based on secondary data = Ratio of the number of nights spent to the number of guests that gave rise to these nights spent. Number of nights spent / Number of guests that originated those nights
Geographic level and periodicity	NUTSII Annual (2007-2021)
Data source(s)	https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publicacoes&PUBLICACOESpub_boui=384536089&PUBLICACOESmodo=2
Limitations/issues	Classification of touristic establishments is consistent from 2013 onwards. Till 2012 touristic accommodation establishments did not include rural and habitational tourism, local accommodation, camping sites, youth hostels, lodges or summer camps. Moreover, each year had different components in the definition.

Table A8: Total income in tourism accommodation establishments

Algarve Indicator	Total income in tourism accommodation establishments
UNWTO Mandatory Area	Destination Economic Benefits
ETIS section	B. Economic value
ETIS criterion	B.1 Tourism flow at destination
ETIS indicator	NA
Description	Total income in tourism accommodation establishments, in thousands of euros
Concepts	TOTAL REVENUE FROM TOURIST ACCOMMODATION: Values resulting from the activity of tourist accommodation: room, catering and others resulting from the activity itself (room hire, laundry, tobacconist, telephone, among others
Approach	Direct use of secondary data
Geographic level and periodicity	NUTSII and Municipality: Annual (2022 – 2024)
Data source(s)	INE, Integrated business accounts system. Indicator: Total incomes (€) in tourist accommodation establishments by Geographic localization (NUTS - 2024) and Type (tourist accommodation establishment)
Limitations/issues	Classification of touristic establishments is consistent from 2013 onwards. Till 2012 touristic accommodation establishments did not include rural and habitational tourism, local accommodation, camping sites, youth hostels, lodges or summer camps. Moreover, each year had different components in the definition.

Table A9: Average Number of Golf rounds

Algarve Indicator	Average Number of Golf rounds
UNWTO Mandatory Area	Destination Economic Benefits
ETIS section	B. Economic value
ETIS criterion	B.1 Tourism flow at destination
ETIS indicator	NA
Description	Average Number of Golf rounds in the Algarve
Concepts	NA
Approach	Direct use of secondary data (converted into percentages).
Geographic level and periodicity	NUTSII : Annual (2022 – 2024)
Data source(s)	Association of Hoteliers and Touristic Enterprises of the Algarve (AHETA)
Limitations/issues	Lack of municipality data

Table A10: Direct employment in tourism as a percentage of total employment in the region

Algarve Indicator	Direct Employment in tourism as a percentage of total employment in the region
UNWTO Mandatory Area	Employment
ETIS section	B. Economic value
ETIS criterion	B.3 Quantity and Quality of employment
ETIS indicator	B.3.1 Direct tourism employment as a percentage of total employment in the destination
Description	This indicator allows to understand the role of tourism in job creation and the relative importance of the sector in terms of job creation.
Concepts	STAFF: The persons who during the reference period participated in the business of the enterprise/institution, regardless of the duration of this participation, under the following conditions: a) staff bound to the enterprise/institution by an employment contract, receiving remuneration in return; b) staff which has ties to the enterprise/institution, who, for not being bound by an employment contract, does not receive regular remuneration for the hours worked or the labour supplied (e.g. owner-managers, unpaid family workers, active members of cooperatives); c) staff with ties to other enterprises/institutions who worked at the enterprise/institution and receive remuneration directly from it; d) persons in the above situations, absent for a period of no more than one month due to holidays, labour dispute, vocational training, as well as disease and occupational accident. HOTEL ESTABLISHMENT: Tourist development (establishment) with the purpose of providing, on a fee basis, lodging and other accessory or support services, with or without the provision of meals. Hotel establishments can be classified as: hotels, boarding houses, lodging houses, inns, motels and apartment-hotels. For statistical purposes, also included here are tourist villages and tourist apartments.
Approach	Employment in tourism sectors as a %age of total employment = (Total employment in Accommodation sector + Food and beverage sector + Travel Agencies, tour operator, reservation services and related activities)/Total employment*100
Geographic level and periodicity	NUTSII and Municipality: Annual (2022 – 2023)
Data source(s)	INE, Integrated business accounts system. Indicator: Persons employed (No.) in hotel establishments by Geographic localization (NUTS - 2013) and Type (hotel establishment); Annual For total employment and employment in tourism sectors: Persons employed (No.) in Enterprises by Geographic localization (NUTS - 2013) and Economic activity (Division - CAE Rev. 3); Annual
Limitations/issues	The sector 'accommodation and food service activities', 'accommodation sector' and 'food and beverage sector' have been considered to represent the tourism sector, as there is no direct data designated as 'tourism sector'. The annual employment figures for hotel establishments by geographic localization and type have also been included. However, data for municipalities is not available for this category.

Table A11: Number of nights in tourist accommodation establishments, per month

Algarve Indicator	Number of nights in tourist accommodation establishments
UNWTO Mandatory Area	Destination Economic Benefits
ETIS section	B. Economic value
ETIS criterion	B.1 Tourism flow at destination
ETIS indicator	B.1.1 Number of tourist nights per month
Description/concepts	Number of nights in tourist accommodation establishments per month. Tourist accommodation establishment: Establishment that provides short-term accommodation services for remuneration, operating in one or more buildings or facilities. Types: hotels, apartment hotels, tourist apartments, tourist villages, Inns and others.
Approach	Direct use of secondary data
Geographic level and periodicity	NUTSII: Monthly (Jan 2013– Oct 2022) By Municipalities, Annual: (2011-2020)
Data source(s)	• TravelBI by Turismo de Portugal. https://travelbi.turismodeportugal.pt/ptpt/Paginas/PowerBI/dormidas.aspx (They have sourced the data from: INE, Guest stays and other data on hotel activity survey. Indicator: Nights (No.) in tourist accommodation establishments by Geographic localization (NUTS - 2013) and Type (tourist accommodation establishment); Monthly) For municipality data http://smi.ine.pt/Indicador/Detalhes/13750?LANG=EN
Limitations/issues	The category 'tourist accommodation establishments' does not capture the full scope of accommodation types. Nights in youth hostels, campsites and holiday camps are not included in this indicator.

Table A12: Seasonality Rate

Algarve Indicator	Seasonality Rate
UNWTO Mandatory Area	Seasonality

ETIS section	No Match as it is Algarve specific indicator
ETIS criterion	
ETIS indicator	
Description/concepts	*Seasonality Rate = (Total No. of nights in tourist accommodation establishments in July + August + September / Total No. of nights in tourist accommodation establishments whole year)*100* Seasonality Rate: assesses the relative weight of tourist demand in the three months of greatest demand (July, August and September), in relation to the annual total, as measures by the number of overnight stays in accommodation establishments. Tourist accommodation establishment: Establishment that provides short-term accommodation services for remuneration, operating in one or more buildings or facilities. Types: hotels, apartment hotels, tourist apartments, tourist villages, Inns and others.
Approach	Composite Indicator based on secondary data
Geographic level and periodicity	NUTSII: Monthly (Jan 2014 – Oct 2022)
Data source(s)	• travelBI by Turismo de Portugal. https://travelbi.turismodeportugal.pt/ptpt/Paginas/PowerBI/dormidas.aspx (They have sourced the data from: INE, Guest stays and other data on hotel activity survey. Indicator: Nights (No.) in tourist accommodation establishments by Geographic localization (NUTS - 2013) and Type (tourist accommodation establishment); Monthly)
Limitations/issues	The category 'tourist accommodation establishments' does not capture the full scope of accommodation types. Nights in youth hostels, camp-sites and holiday camps are not included in this indicator. Using this formula, it is not possible to calculate seasonality for the municipalities of Algarve as monthly data is not available for "total no. of nights in tourist accommodation establishments". Only annual data (from 2011-2018) is available at INE for the municipalities.

Table A13: Market share of the main source markets

Algarve Indicator	Seasonality Rate
UNWTO Mandatory Area	Seasonality

ETIS section	No Match as it is Algarve specific indicator
ETIS criterion	
ETIS indicator	
Description/concepts	*Seasonality Rate = (Total No. of nights in tourist accommodation establishments in July + August + September / Total No. of nights in tourist accommodation establishments whole year)*100* Seasonality Rate: assesses the relative weight of tourist demand in the three months of greatest demand (July, August and September), in relation to the annual total, as measures by the number of overnight stays in accommodation establishments. Tourist accommodation establishment: Establishment that provides short-term accommodation services for remuneration, operating in one or more buildings or facilities. Types: hotels, apartment hotels, tourist apartments, tourist villages, Inns and others.
Approach	Composite Indicator based on secondary data
Geographic level and periodicity	NUTSII: Monthly (Jan 2014 – Oct 2022)
Data source(s)	• travelBI by Turismo de Portugal. https://travelbi.turismodeportugal.pt/ptpt/Paginas/PowerBI/dormidas.aspx (They have sourced the data from: INE, Guest stays and other data on hotel activity survey. Indicator: Nights (No.) in tourist accommodation establishments by Geographic localization (NUTS - 2013) and Type (tourist accommodation establishment); Monthly)
Limitations/issues	The category 'tourist accommodation establishments' does not capture the full scope of accommodation types. Nights in youth hostels, camp-sites and holiday camps are not included in this indicator. Using this formula, it is not possible to calculate seasonality for the municipalities of Algarve as monthly data is not available for "total no. of nights in tourist accommodation establishments". Only annual data (from 2011-2018) is available at INE for the municipalities.

Table A14: Electricity consumption by tourists as a percentage of resident energy consumption

Algarve Indicator	Electricity consumption by tourists as a percentage of resident energy consumption
UNWTO Mandatory Area	Environmental Impact
ETIS section	D. Environmental Impact
ETIS criterion	D.6. Energy Usage
ETIS indicator	D.6.1. Energy consumption per tourist night compared to general population energy consumption per resident night
Description	This indicator measures the number of passengers moving on inland waterways
Concepts	It is assumed that domestic electricity consumption is the sum of resident consumption and tourist consumption.
Approach	(Tourists consumption)/(Domestic consumption)*100
Geographic level and periodicity	NUTS II: Annual (2020-2022)
Data source(s)	DGEG (National Directory of Energy and Geology)
Limitations/issues	The proxy used as tourism and resident consumption can be quite reducting.

Table A15: Different means of transportation used by tourists to reach their destination

Algarve Indicator	Different means of transportation used by tourists to reach their destination
UNWTO Mandatory Area	Environmental Impact
ETIS section	D. Environmental Impact
ETIS criterion	D.1. Reducing Transport Impact
ETIS indicator	D.1.1. Percentage of tourists using different modes of transport to arrive at the destination
Description	This indicator measures the percentage of tourists using different modes of transport to arrive at the destination
Concepts	NA
Approach	Data obtained from INE
Geographic level and periodicity	High Season 2022, Low Season 2022/2023, High Season 2023, Fall 2024
Data source(s)	MONITUR Questionnaires
Limitations/issues	Limited Data.

Table A16: Movement of Passengers on Inland Waterways

Algarve Indicator	Movement of Passengers on Inland Waterways
UNWTO Mandatory Area	Environmental Impact
ETIS section	D. Environmental Impact
ETIS criterion	This is Algarve specific
ETIS indicator	Mobility
Description	This indicator measures the number of passengers moving on inland waterways
Concepts	Movement of passengers in inland waterways by river line, that is a regular public transport service following itineraries, timetables or minimum frequencies and with pre-established fares. There are urban and interurban routes. National level Beaches - Ria Formosa (Faro - Faro island; Faro - Deserta island; Faro - Farol island; Olhão - Farol island; Olhão - Culatra island; Olhão - Armona island; Tavira - Tavira island; Quatro-Águas - Tavira island; Fuzeta - Armona island; Sta. Luzia - Terra Estreita; Faro – Culatra island; Cabanas - Cabanas island); and international level Guadiana River (V. R. S. António - Ayamonte).
Approach	Data obtained from INE by OBSERVE
Geographic level and periodicity	Quarterly data from 2005 to 2022 (Q3)
Data source(s)	INE- Retrieved from Inland waterways passengers and goods transport survey
Limitations/issues	Pressure on inland waterways is measured

Table A17: Number of passengers boarded and disembarked at Faro Airport

Algarve Indicator	Number of passengers boarded and disembarked at Faro Airport
UNWTO Mandatory Area	Environmental Impact
ETIS section	D. Environmental Impact
ETIS criterion	This is Algarve specific
ETIS indicator	Mobility
Description	This indicator provides the number of passengers embarked and disembarked at Faro Airport
Concepts	Nature of traffic (internal, territorial and international) is captured via this indicator.
Approach	Data obtained from INE by OBSERVE
Geographic level and periodicity	Yearly data from 2007 to 2022 (Q3)
Data source(s)	INE- Retrieved from Airports and airfields survey.
Limitations/issues	Reflects the strong seasonality of the tourist activity.

Table A18: Percentage of tourists that are satisfied with their overall experience in the destination

Algarve Indicator	Percentage of tourists and same-day visitors that are satisfied with their overall experience in the destination
UNWTO Mandatory Area	Destination Management
ETIS section	A. Destination Management
ETIS criterion	A.2. Customer Satisfaction
ETIS indicator	Percentage of tourists that are satisfied with their overall experience in the destination
Description	This indicator provides the percentage of tourists that are satisfied with their overall experience in the destination
Concepts	NA
Approach	Data obtained from MONITUR questionnaires
Geographic level and periodicity	High Season 2022, Low Season 2022/2023, High Season 2023, Fall 2024
Data source(s)	MONITUR questionnaires
Limitations/issues	Lack of information.

Table A19: Percentage of tourists with a positive overall perceived quality of the experience

Algarve Indicator	Percentage of tourists with a positive overall perceived quality of the experience
UNWTO Mandatory Area	Destination Management
ETIS section	A. Destination Management
ETIS criterion	A.2. Customer Satisfaction
ETIS indicator	Percentage of tourists with a positive overall perceived quality of the experience
Description	This indicator provides the percentage of tourists with a positive overall perceived quality of the experience
Concepts	NA
Approach	Data obtained from MONITUR questionnaires
Geographic level and periodicity	High Season 2022, Low Season 2022/2023, High Season 2023, Fall 2024
Data source(s)	MONITUR questionnaires
Limitations/issues	Lack of information.

Table A20: Percentage of repeat/return visitors (within 5 years)

Algarve Indicator	Percentage of repeat/return visitors (within 5 years)
UNWTO Mandatory Area	Destination Management
ETIS section	A. Destination Management
ETIS criterion	A.2. Customer Satisfaction
ETIS indicator	A.2.2. Percentage of repeat/return visitors (within 5 years)
Description	This indicator provides the percentage of repeat/return visitors within 5 years
Concepts	NA
Approach	Data obtained from MONITUR questionnaires
Geographic level and periodicity	High Season 2022, Low Season 2022/2023, High Season 2023, Fall 2024
Data source(s)	MONITUR questionnaires
Limitations/issues	Lack of information.