

ANNUAL PROGRESS REPORT 2024

Center of Intelligence of
Tourism Economics

State of São Paulo

INSTO / UN Tourism

GOVERNMENT OF THE STATE OF SÃO PAULO

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ACRONYMS

ABIH (Brazilian Association of the Hotel Industry)

ANAC (National Civil Aviation Agency)

ANTT (National Agency of Land Transportation)

ARTESP (Transportation Agency of the State of São Paulo)

CETESB (Environmental Company of the State of São Paulo)

CITE (Center of Intelligence of Tourism Economics)

CPFL (Paulista Power and Light Company)

DAEMO (Department of Water and Sewage of the Municipality of Olímpia)

EDP (Portugal Energy)

EMBRATUR (Brazilian Tourism Board)

FIPE (Economic Research Institute Foundation)

IBGE (Brazilian Institute of Geography and Statistics)

IDSC - SP (Sustainable Development Index of Cities – São Paulo)

InvestSP (Investment Promotion Agency of The State of São Paulo)

JUCESP (Commercial Registry of the State of São Paulo)

NEOENERGIA (Energy distribution company of the Spanish group Iberdrola)

SAAE Aparecida (Aparecida Autonomous Water and Sewage Service)

SAAE Brotas (Brotas Autonomous Water and Sewage Service)

SABESP (Basic Sanitation Company of the State of São Paulo)

SAERP (Ribeirão Preto Water and Sewage Department)

SANASA (Water Supply and Sanitation Society)

SETUR-SP (São Paulo State Travel and Tourism Secretariat)

SOCICAM (concessionaires of the main bus terminals in the state of São Paulo)

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

CITE is the observatory of studies and research of the São Paulo State Travel and Tourism Secretariat (SETUR-SP). It was created in 2019, as part of the contract with the Investment Promotion Agency of the State of São Paulo (InvestSP) to periodically analyze the behavior of São Paulo State's tourism segment as well as tourism sustainability. The initiative came to fill a gap in SETUR-SP, identified by the managers of the Secretariat, who took office in January 2019.

CITE was established to analyze the tourism and events market in nine key destinations within the state of São Paulo, identifying trends and providing insights to inspire new strategies and initiatives for the sector. In addition to this, CITE regularly monitors monthly indicators, including hotel performance, passenger traffic at airports and bus terminals, as well as water and energy consumption, and employment figures. Furthermore, CITE conducts important estimations for the tourism sector in the state, such as tourism GDP and tourist flow.

Alongside these activities, CITE conducts research at major local events throughout the state, such as the Barretos Rodeo Festival, Expoflora, and Our Lady of Aparecida Day. In these surveys, items such as public profile, percentage and profile of tourists, economic impact, as well as aspects like evaluation of participants about the cities and the event are investigated and analyzed. These data are used by CITE/SETUR-SP to improve the service for tourists in each city, to specify the necessary training for the personnel involved, and to generate campaigns and programs aimed at the target audience of the event, as well as to monitor the sustainability of the sector.

Periodically, CITE also conducts courses and educational programs to form local researchers in São Paulo destinations, being able to conduct major studies that are essential to guide the actions of SETUR-SP and the entire tourism production chain in São Paulo. All research and publications produced by CITE are available for consultation and download at: <https://www.turismo.sp.gov.br/ciet>.



THE STATE OF SÃO PAULO

São Paulo is in the southeast of Brazil. It has a total area of 248,219 square kilometers, with 645 municipalities and a population of 46.6 million people, which accounts for 22% of the Brazilian population. (Source: IBGE).

The state of São Paulo has three tourism hubs: the capital, the coast, and the countryside. The capital, with its 12.33 million inhabitants, is the center of MICE tourism in Brazil and has the largest offer of means of accommodation in the country. The city also has a high demand for gastronomic tourism, cultural tourism, international shows, and music festivals. The city, in addition to being an important destination, is one of the largest emitters for cities on the coast and countryside.



The State Capital's skyline and Pinheiros river

The coast of São Paulo, with 622 kilometers of extension, has 293 beaches in 16 municipalities which are very popular on weekends, holidays and summer vacations, especially among the state's inhabitants. Many of the capital's inhabitants have second homes in the coastal cities. In the countryside, you can find resorts, rural and ecological tourism, cities with a temperate climate, waterfalls, caves, rivers, mountains, springs of mineral water, natural parks, historic buildings from the 16th, 17th, and 18th centuries, churches in Jesuit architecture, archaeological sites and ecotourism destinations.

OVERVIEW OF TOURISM IN SÃO PAULO IN 2024

Perception of Tourism Survey Among the State Population

The Tourism Perception Survey (2024-2025) was conducted by CITE with the support of the state municipalities.

The online form, containing 4 profile questions and 21 opinion questions about the impacts of tourism on cities, in a multiple-choice format, was answered by residents of municipalities in São Paulo between November 21st, 2024 and February 9th, 2025 totaling 30,016 valid forms answered in 438 municipalities. The results have a confidence level of 99%, with a margin of error of 0.74 percentage points.

The survey took place for the fifth consecutive year and provides a solid basis for municipal tourism governors to measure and monitor local satisfaction with tourism and residents' perceptions of the sociocultural, environmental and economic impacts of tourism activity along with planning and management, to ensure that the sustainable growth of tourism in the state of São Paulo is aligned with the values of its population.

As some general results of the survey, it can be highlighted that:

✓ **85%** of the population consider tourism **good** for their cities.



64.2% of the population have a positive view of the **environmental impacts** of tourism in their cities.



66.4% of the population have a positive view of the **economic impacts** of tourism in their cities.



68.6% of the population have a positive view of the **planning and management impacts** of tourism in their cities.



74.3% of the population have a positive view of the **sociocultural impacts** of tourism in their cities.

All the state municipalities or tourism regions have access to their individual results, if a minimum sample was achieved, by accessing the results dashboard at

<https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

and the nine cities monitored by CITE also received a customized report on their results.

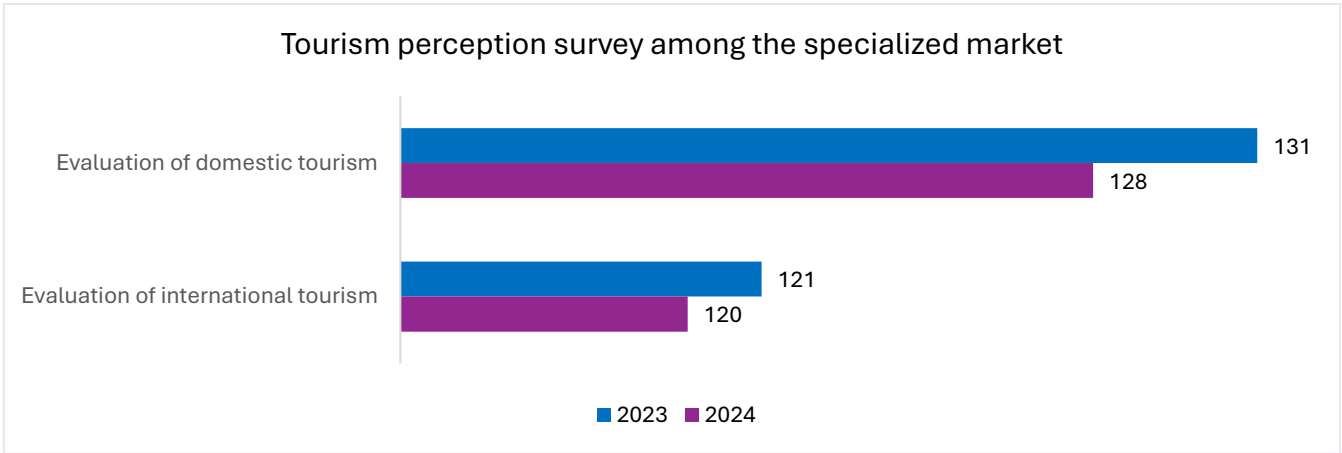
Perception of Tourism Survey Among the Specialized Market

Every quarter, an online survey is conducted by CITE in which the specialized tourism market in the state of São Paulo evaluates the performance of tourism in their regions or businesses in the previous three months and the outlook for the next three months on the following scale, according to a methodology based on the UNTourism’s Tourism Confidence Index: much worse (0), worse (50), the same (100), better (150) or much better (200).

The average of all responses determines the confidence index. A value below 100 indicates a deterioration in performance, while a value above 100 represents an improvement.

The survey is answered by an average of 500 companies in the sector and municipal tourism managers, and a separate assessment is made of past and future, domestic and international tourism.

Through this study, we can learn about the sentiment of the specialized market and destinations in relation to performance and expectations.



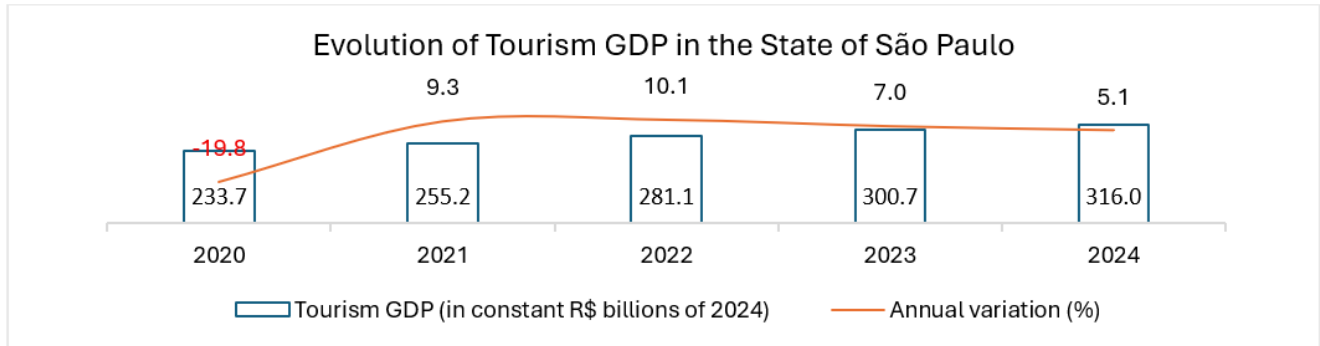
When we compare the overall average for the years 2023 and 2024, we see that, although the values remained above 100, which is a positive evaluation, there was a slight drop in the evaluation in 2024.

This result may be the reflection of some national public policies that were under discussion and that directly affect the tourism sector, such as the end of the 6x1 scale or the discontinuation of the Emergency Program for the Recovery of the Events Sector (PERSE, in Portuguese) created at the end of the Covid pandemic.

All survey reports can be viewed at:
<https://www.turismo.sp.gov.br/categoria/397>

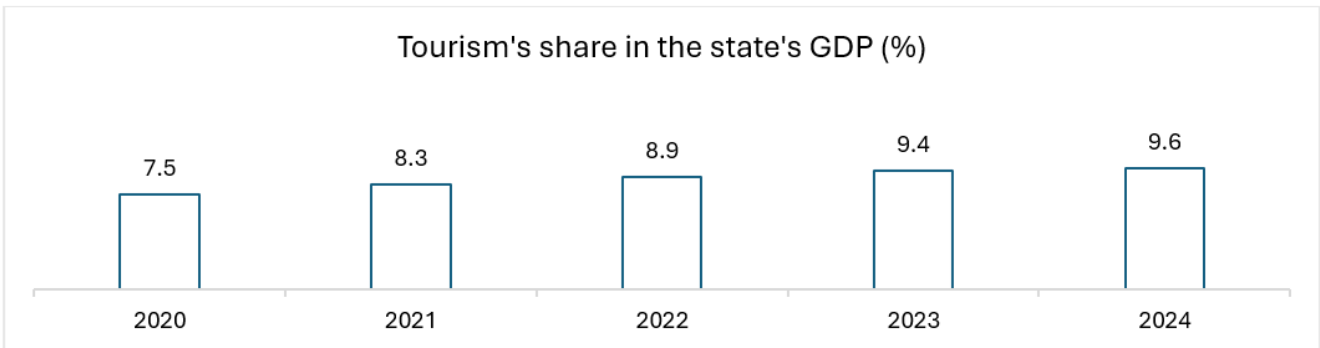
Economic Benefits

Tourism GDP: tourism in the state of São Paulo showed a better economic performance than previous years, closing the year 2024 with a GDP of BRL 316 billion, which represents an annual variation of +5.1%.



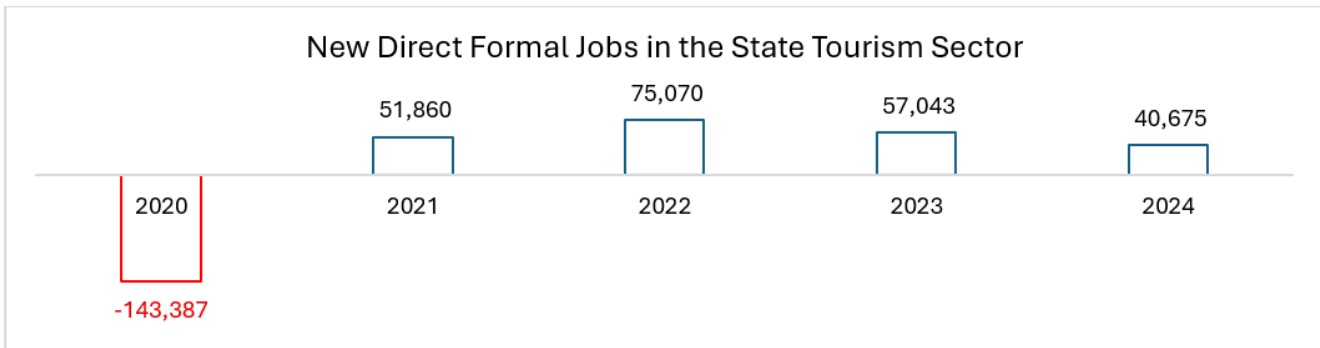
Source: CITE/SETUR-SP

Tourism plays an important role in the economy of the state of São Paulo, accounting for 9.6% of the state's overall GDP, a figure that has shown constant growth over the years.



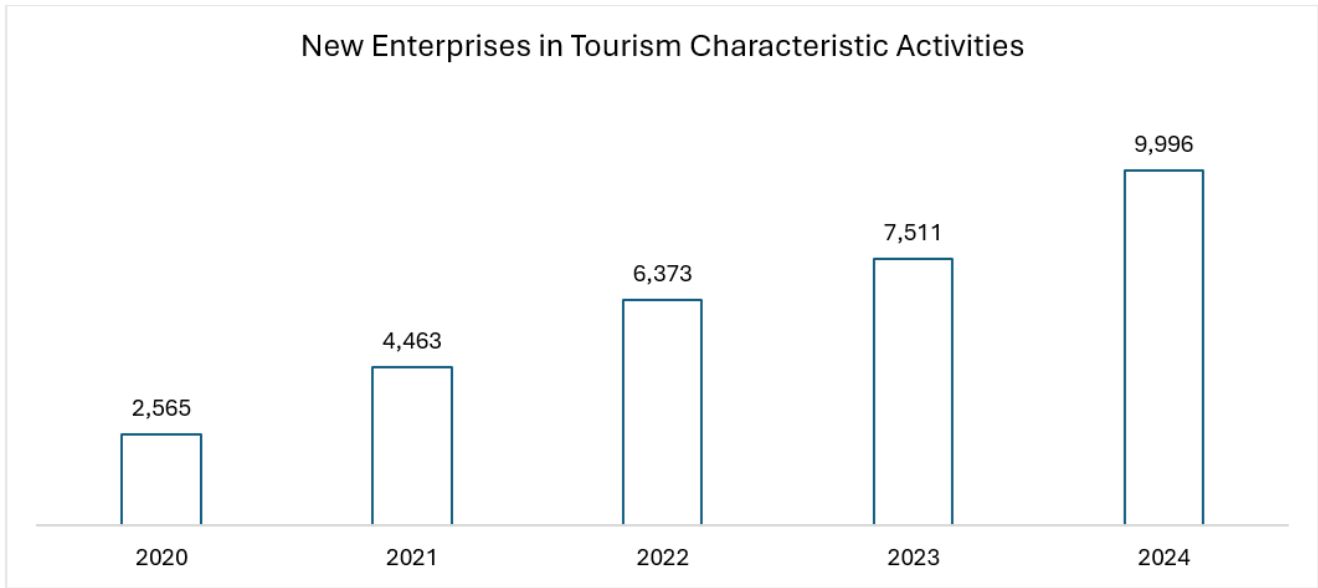
Source: CITE/SETUR-SP

Employment: the tourism sector generated 40,675 new direct formal jobs in 2024. There are currently 930,761 people in direct formal jobs in the sector, which represents an increase of +4.6% in 12 months.



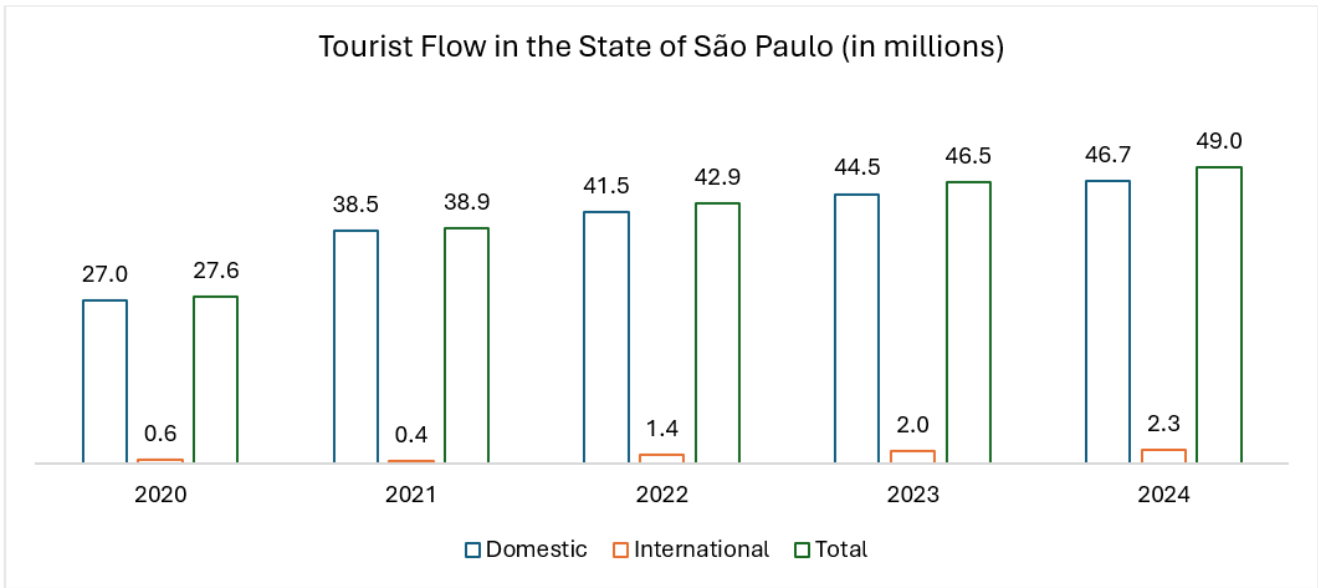
Source: Novo CAGED (General Register of Employed and Unemployed Persons / Ministry of Labor)

Enterprises: the year 2024 saw excellent growth in the number of companies in activities characteristic of tourism, with emphasis on the vehicle rental sector, which grew +11% in 12 months, and the events sector, which grew +4%.



Source: JUCESP (Commercial Board of the State of São Paulo)

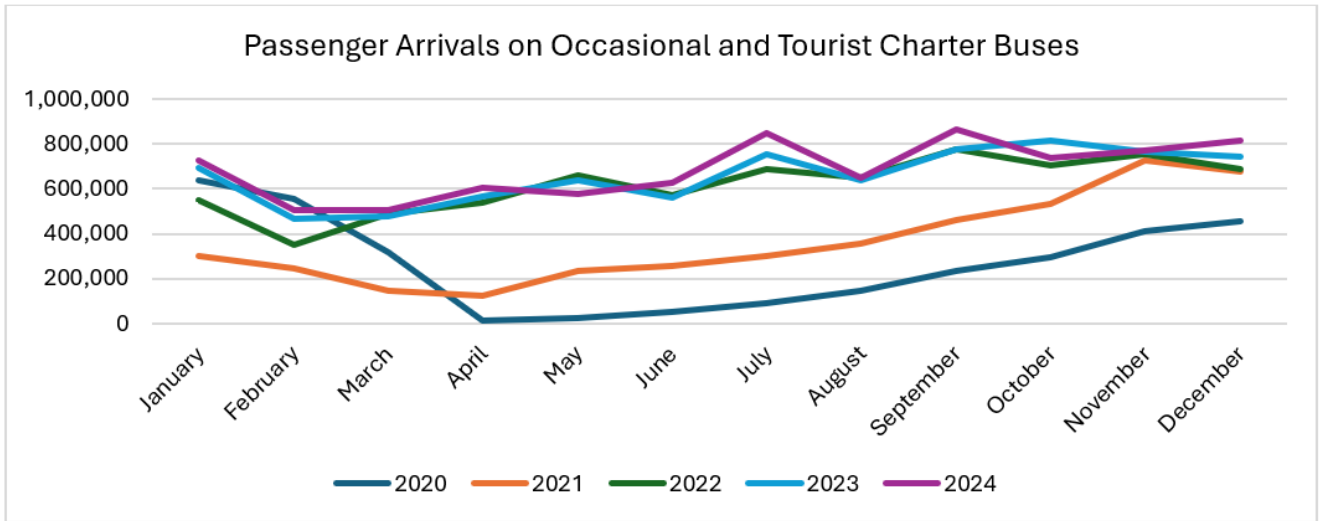
Tourist flow: São Paulo had a +5.4% growth in the volume of visitors arriving in the state in 2024, with 46.7 million domestic visitors and 2.3 million international visitors.



Source: CITE/SETUR-SP

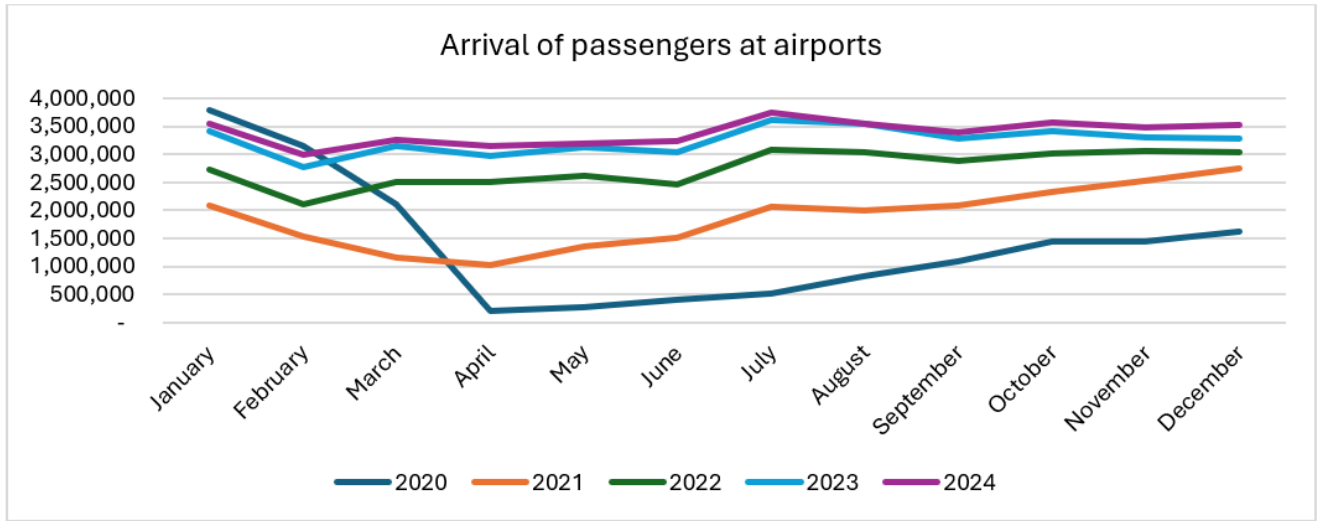
Seasonality

The graph showing passenger arrivals on **chartered and tourist buses** reveals a clear seasonal pattern between 2021 and 2024. There is a clear low season from February to April, with numbers falling to around 350-450 thousand passengers, while peaks occur in July (coinciding with the winter school holidays) and September, when numbers reach approximately 850 thousand passengers in 2024. The sector's progressive recovery after 2021 is notable, with 2022-2024 showing significantly higher volumes and more stable patterns.



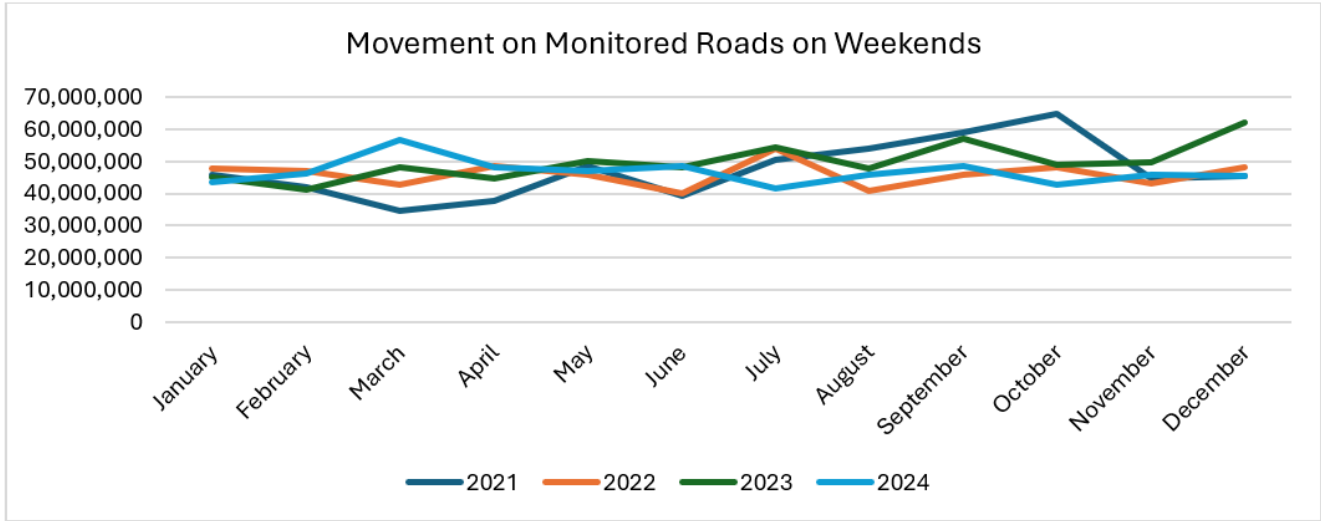
Source: ANTT (National Land Transport Agency)

Passenger arrivals at São Paulo airports between 2021 and 2024 show less pronounced seasonality when compared to other indicators. Airport traffic remains relatively stable throughout the year, especially in 2023-2024, with volumes ranging from 3 to 3.8 million passengers per month, indicating a constant flow of travelers, characteristic of destinations with strong business tourism. There are slight declines in April and moderate peaks in January and July, reflecting the summer and winter holidays, respectively.



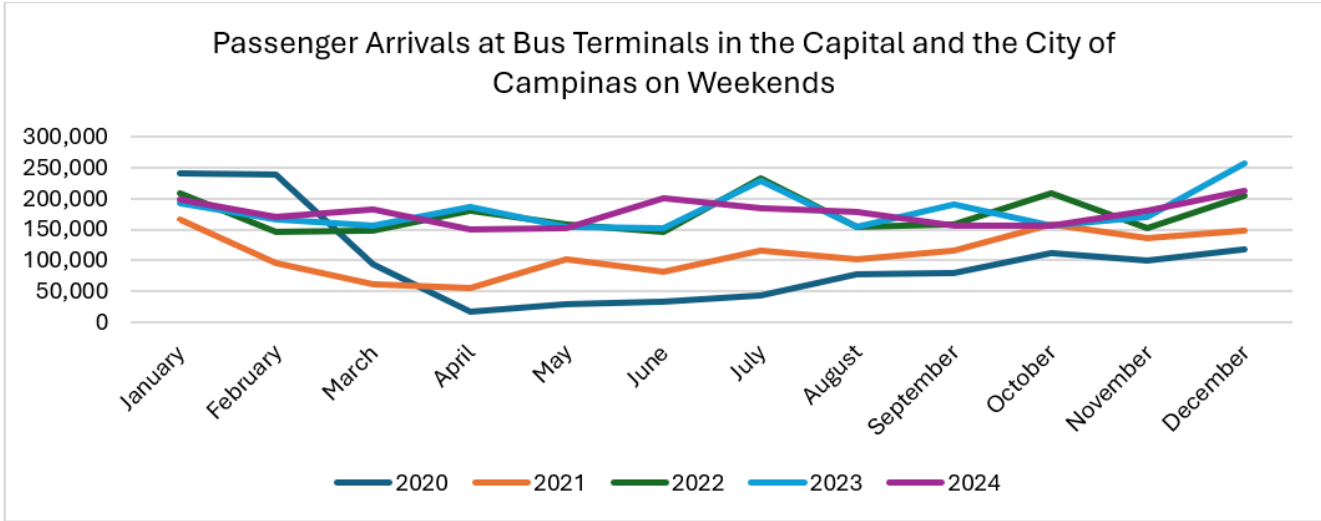
Source: ANAC (National Civil Aviation Agency)

Traffic on the **monitored roads** during weekends shows a less defined seasonal pattern and is more variable across the years analyzed. Unlike the other indicators, fluctuations do not follow such a consistent pattern, with 2023 (light blue line) showing significantly higher values in the second half of the year, exceeding 60 million vehicles in October. A trend toward increased traffic is observed between October and December, especially in 2023, possibly related to long holidays and year-end travel.



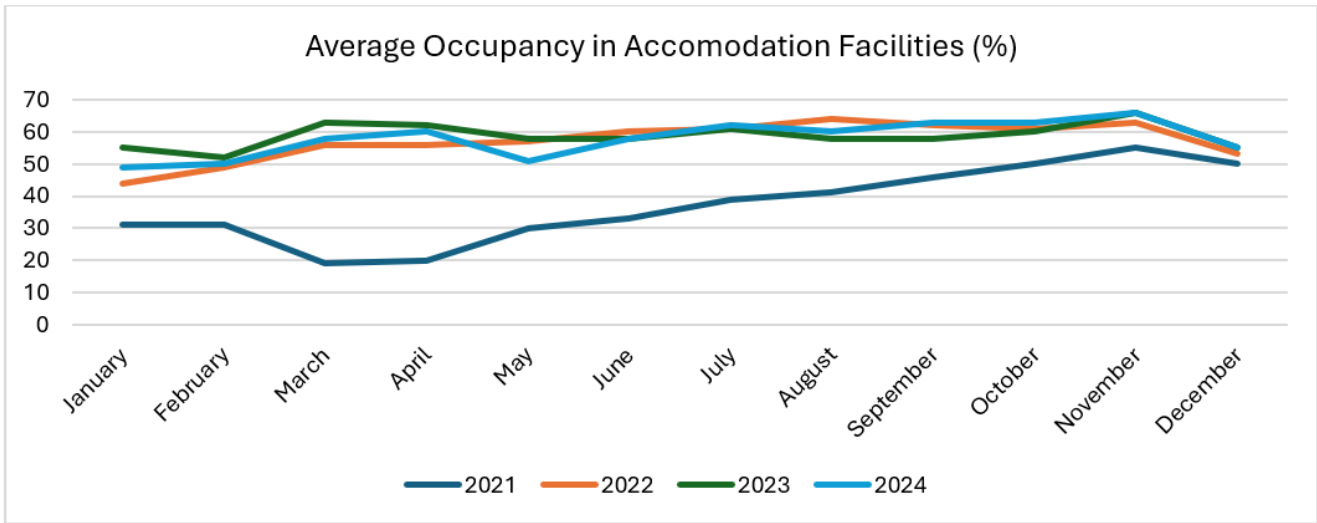
Source: ARTESP (São Paulo State Transportation Agency)

Passenger arrivals at **bus terminals** in the capital and Campinas during weekends show a moderate seasonal pattern, with a clear low season in March-April (approximately 150,000 passengers in 2022-2024) and peaks in July and December, when numbers reach 240-250,000 passengers in 2023. This indicator reflects both leisure tourism and regular regional traffic. Noteworthy are the significant peaks in July and December, coinciding with the main school holiday periods.



Source: Socicam Mobility Solutions

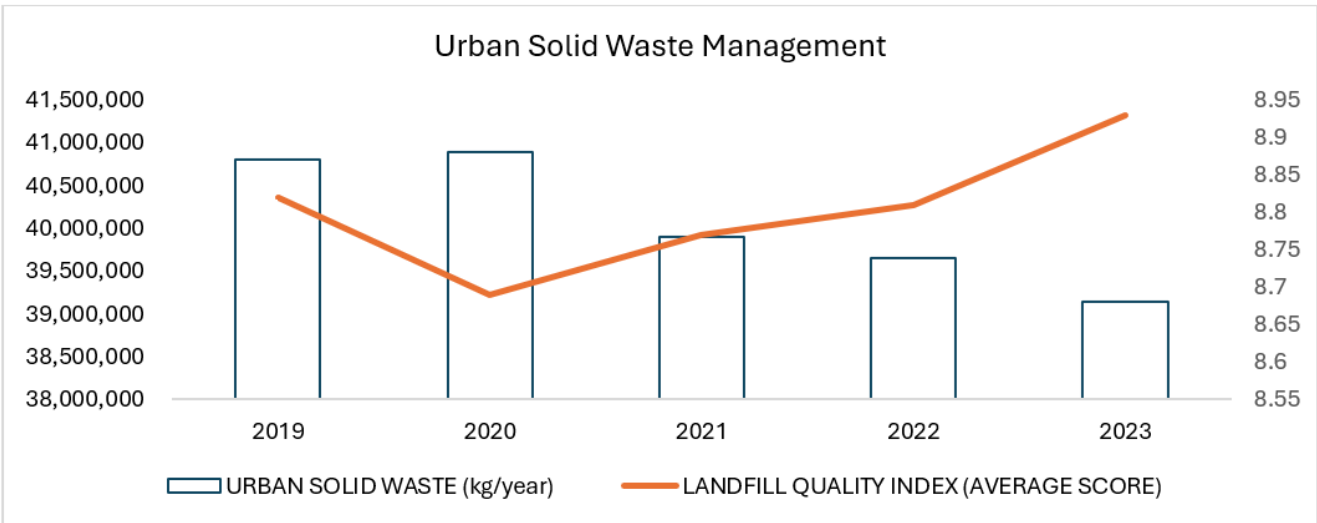
The **hotel occupancy** rate in São Paulo between 2022 and 2024 shows a well-defined seasonal pattern, with low season in March-April (rates between 45-50% in 2022-2024) and high season in October-November, when occupancy reaches 65-67%. Unlike transport indicators, hotel occupancy does not show such a pronounced peak in July, suggesting that many visitors during this period may be day trippers or visitors. There is also a consistent decline in December in all the years analyzed, possibly reflecting the decrease in business travel during the holiday season.



Source: ABIH (Brazilian Hotel Industry Association)

Environement

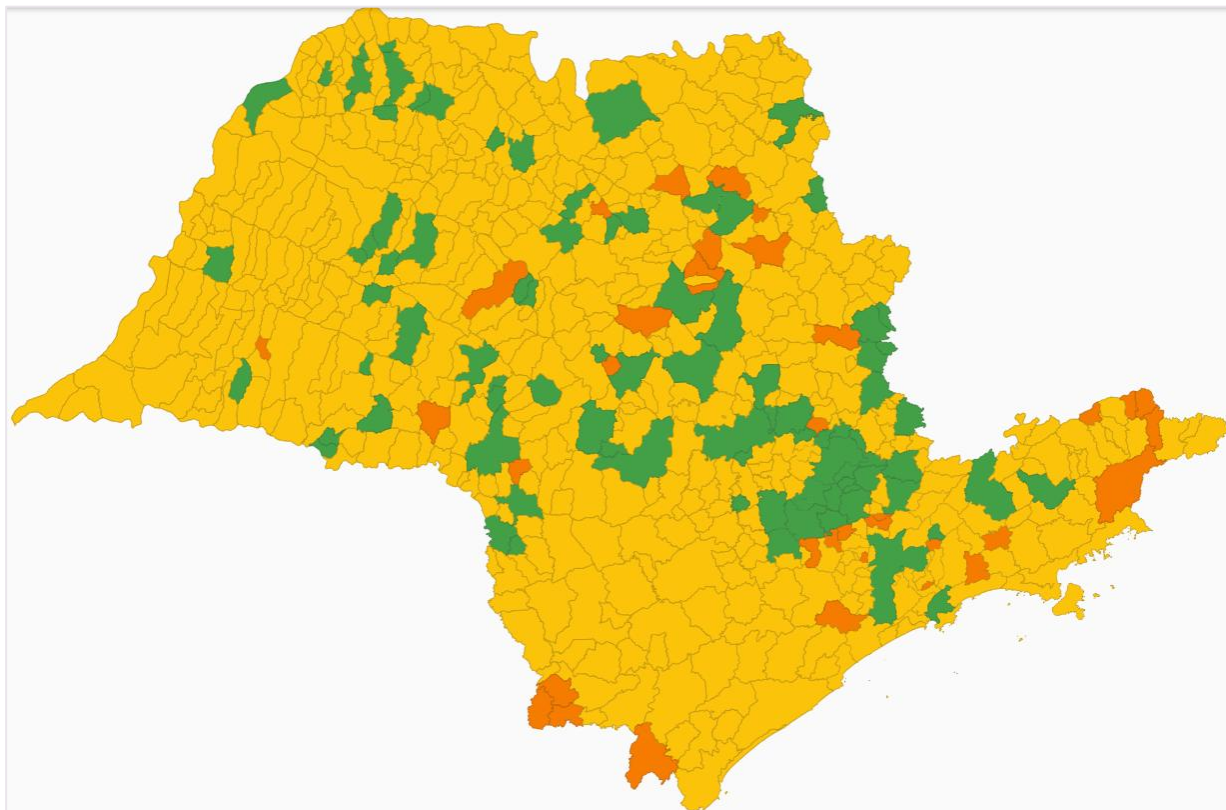
Solid Waste: the volume of solid waste in landfills in the state of São Paulo has generally decreased. Consequently, landfills have been given a better evaluation. This movement is largely due to the increase in recycling campaigns and the professionalization of recyclable waste collector cooperatives throughout the state.



Source: CETESB (Environmental Company of the State of São Paulo)

Sustainable Development Goals

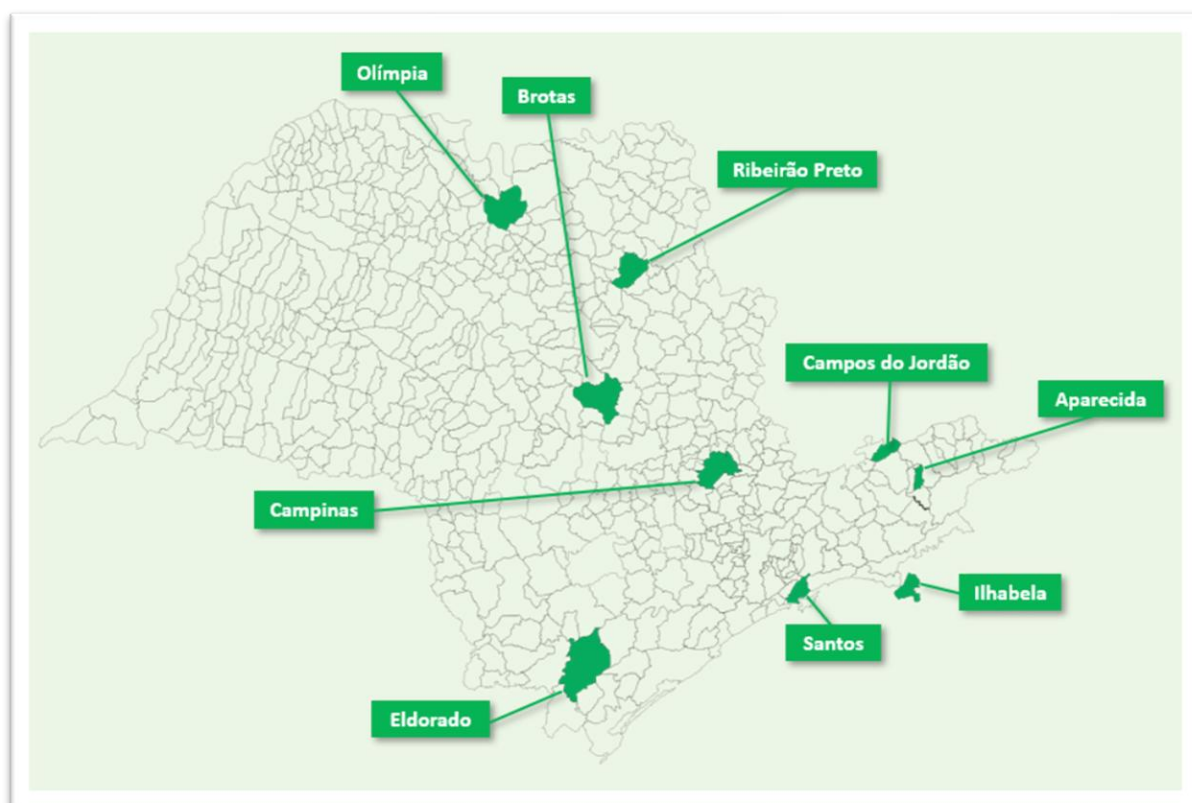
According to monitoring by the Sustainable Cities Institute (ICS in Portuguese), most cities in the state of São Paulo still have several challenges to overcome, ranking between 50 and 59.99 (cities in yellow) of the 100 points needed to achieve all sustainable development goals.



THE NINE CITIES IN THE STATE OF SÃO PAULO MONITORED BY CITE

The state of São Paulo has 214 official tourist municipalities, from a total of 645 cities, and other 152 cities located in tourist regions. Therefore, CITE has decided to monitor tourism through nine key cities that have a big representativity for the state. The cities are not concentrated in just one region of the state, which allows CITE to assess tourism in a broader manner that considers a variety of profiles.

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



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

- ✓ Tourist flow: considering the criteria of the World Tourism Organization, which defines the parameters for measuring tourist flows (IRTS – 2008), the cities chosen for permanent monitoring by CITE have proportionally the highest volumes of tourists throughout the year among all tourist destinations in São Paulo, excluding the city of São Paulo.
- ✓ Regional relevance: they are “Estâncias Turísticas (touristic cities title granted to 70 cities in São Paulo)” as in the case of Aparecida, Brotas, Campos do Jordão, Eldorado, Ilhabela and Olímpia. Also, the cities of Campinas and Ribeirão Preto, regardless of recognition for this title, are major economic and tourist centers in their respective regions, with high flows of visitors throughout the year.

- ✓ Availability of structured data and information with a historical series, both for the tourism sector and other relevant indicators. In particular, data on energy consumption, water, sewage treatment, waste recycling and climate action.

It is important to emphasize that CITE, as a project of the São Paulo State Travel and Tourism Secretariat, aims to support all 214 tourist cities in monitoring indicators. However, within the scope of CITE, the nine selected cities hold significant importance as they represent, from the point of view of both demand and supply, large monitoring networks and support for obtaining data to expand knowledge of all activity in the state.

TOURISM SUSTAINABILITY INDICATORS MONITORED BY CITE FOR THE NINE CITIES AND THEIR DATA SOURCES

Economic Indicators:

- ✓ New direct formal jobs and job stock in tourism in the state of São Paulo - Source: General Registry of Employed and Unemployed Persons of the Ministry of Labor and Employment.
- ✓ Number of tourism sector enterprises formally registered with the Ministry of Tourism - Source: National Registration System for Individuals and Legal Entities in the Tourism Sector.
- ✓ Volume of visitor arrivals in occasional and tourist charter vehicles in cities in the state of São Paulo - Source: National Land Transport Agency.
- ✓ Average occupancy and RevPAR of accommodation facilities in the cities or their tourist regions of the state of São Paulo - Source: Brazilian Hotel Industry Association in São Paulo

Environmental Indicators:

- ✓ Electricity consumption - Sources: Energy Concessionaire CPFL (for the cities of Brotas, Campinas, Olímpia, Ribeirão Preto and Santos), Energy Concessionaire Neoenergia (for the cities of Campos do Jordão, Eldorado and Ilhabela) and Energy Concessionaire EDP (for the city of Aparecida)
- ✓ Water consumption and sewage treatment – Sources: Water Concessionaire DAEMO (for the city of Olímpia), Water Concessionaire SAAE (for the cities of Aparecida and Brotas), State Company SABESP (for the cities of Campos do Jordão, Eldorado, Ilhabela and Santos), Municipal Water Agency SAERP (for the city of Ribeirão Preto), Water Concessionaire SANASA (for the city of Campinas).
- ✓ Volume of waste produced and quality of solid waste landfills in the state of São Paulo - Source: CETESB - Environmental Company of the State of São Paulo.
- ✓ Coastal water and beach quality index - Source: CETESB - Environmental Company of the State of São Paulo.
- ✓ Sustainable development goals in the state of São Paulo - Source: Sustainable Cities Institute.

Sociocultural Indicators:

- ✓ Accessibility inventory of tourist attractions and facilities in the state of São Paulo - Source: Tourism Ranking Platform of the São Paulo State Travel and Tourism Secretariat.
- ✓ Annual survey of tourism perception among residents of municipalities in the state of São Paulo - Source: CITE.
- ✓ Quarterly survey of tourism perception among the specialized market and municipal secretariats of the state of São Paulo - Source: CITE.

GOVERNANCE – WORKING WITH LOCAL GOVERNMENT, LOCAL TOURISM OBSERVATORIES, TOURISM TRADE, EDUCATIONAL INSTITUTIONS, CIVIL SOCIETY REPRESENTATIVES AND PROFESSIONAL ASSOCIATIONS

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

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

During 2024, CITE was in constant contact not only with municipal government teams, but also with representatives of the local specialized market, entities and educational institutions, in order to promote the dissemination of knowledge, emphasize the importance of monitoring tourism sustainability indicators, support the development of local observatories and disseminate results.

During the year, online training was offered to all cities in the state of São Paulo on the following topics:

- ✓ Methodology for collecting employment data through the Ministry of Labor and Employment system;
- ✓ Training interviewers to conduct field research;
- ✓ How to set up a tourism observatory and which sustainability indicators to monitor;
- ✓ How to obtain the best results in tourism demand surveys and event surveys.



REPORT ON THE NINE CITIES IN 2024

APARECIDA – RELIGIOUS TOURISM

Located in the interior of São Paulo, it is an important religious tourism destination in Brazil, attracting millions of visitors annually due to its connection with Our Lady of Aparecida, the country's patron saint. The city is known for the National Sanctuary, the largest Marian basilica in the world, and the Passarela da Fé (Passage of Faith), which connects the lower and upper parts of the city.

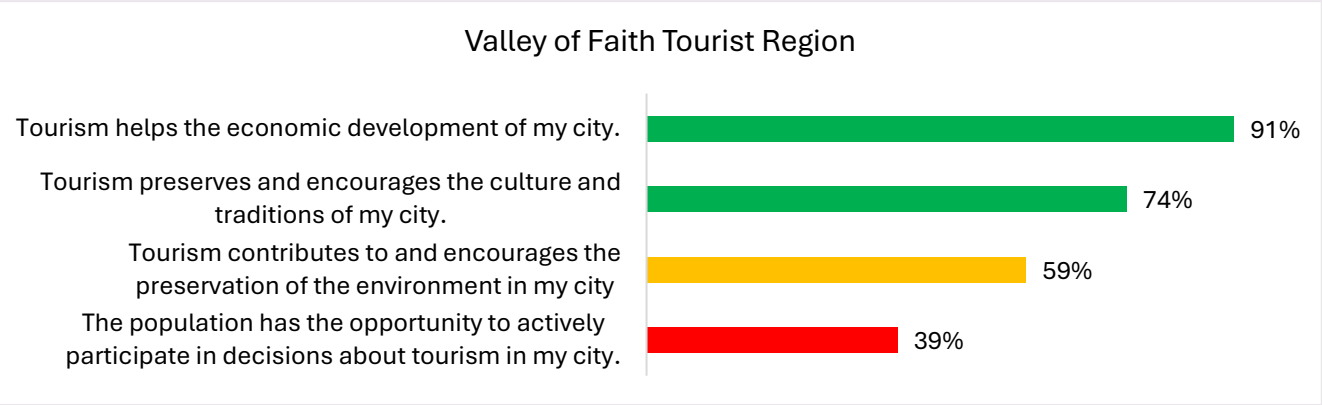
Aparecida has a population of approximately 32,569 inhabitants, according to the 2022 IBGE (Brazilian Institute of Geography and Statistics). The city is located in the interior of São Paulo, 169 km from the capital, and is crossed by Via Dutra, a major highway connecting São Paulo and Rio de Janeiro. Religious tourism is the city's main economic activity, driven by the presence of the National Sanctuary.



Basilica of Our Lady of Aparecida. Photo by Priscila Rodrigues

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Aparecida was unable to obtain a minimum sample for the 2024 perception survey, but the 11 cities in the Valley of Faith Tourist Region managed a sample of 722 responses and CITE chose to consider the regional result, as follows.



Considering the proportion of residents who agreed with the statements presented in the survey, we can see that there is a positive view of the economic and sociocultural impacts of tourism. However, when it comes to environmental impacts, the percentage of the population that considers them positive is very close to 50%, which is a reason for concern. The issue of governance and population participation in decision-making demands immediate attention, given that only 39% of the region's population agrees that there is civil society participation.

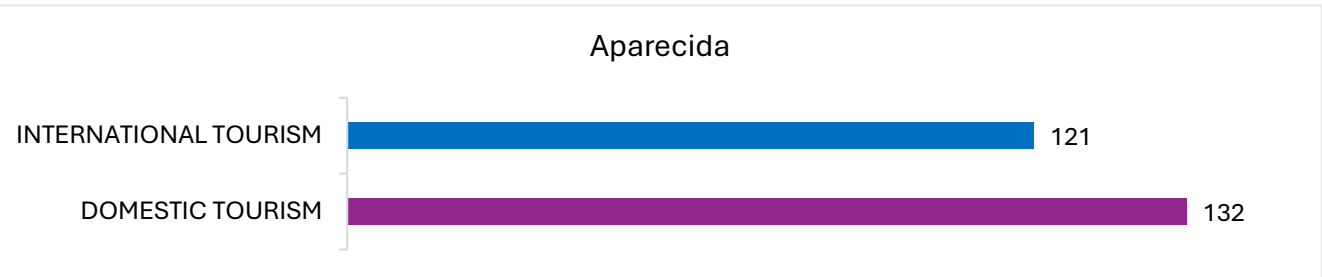
Source: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Aparecida has a positive assessment for 2024 and good expectations for 2025.

The fact that the assessment for international tourism is lower than that for domestic tourism is due to the characteristics of visitors to the region, which are mostly residents of the state of São Paulo itself and neighboring states.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat's Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The city of Aparecida did not declare its accessibility inventory, making it impossible for CITE to monitor this aspect through this source.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS

2020



2023



According to the Sustainable Development Index of the State of São Paulo the city of Aparecida has improved in 12 out of the 17 sustainable development goals when comparing the year 2020 with the most recent numbers from 2023. Three goals remained unchanged and there was a worsening in the status of two other, which led to a slight drop in the general punctuation from 55.3% to **54.5%**, keeping the city in an **average level of sustainable development**. We must highlight the affordable and clean energy goals as well as climate action goals which stand above 80%.

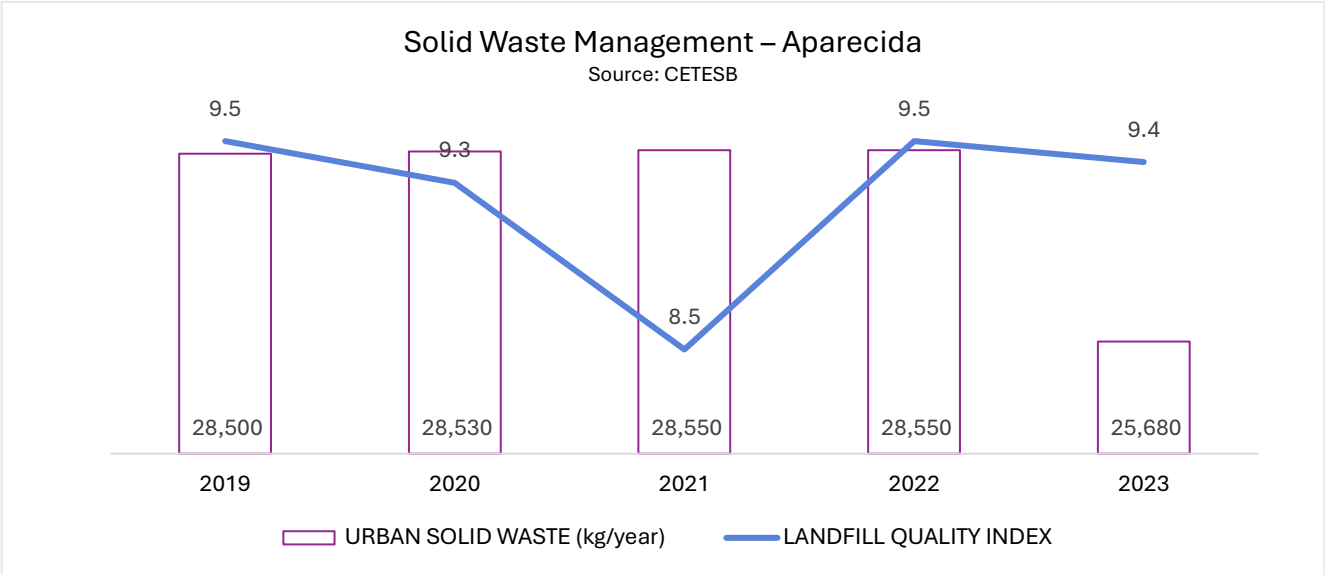
Source: <https://idsc.cidadessustentaveis.org.br/profiles/3502507/>

SOLID WASTE MANAGEMENT

Compared to previous years, when solid waste production in the city of Aparecida was around 28.5 thousand kilos per year, 2023 showed a slight drop of approximately 3 thousand kilos. This number is mainly the result of recycling campaigns in the state of São Paulo and policies to support waste collection cooperatives. However, the drop in the volume of solid waste did not reflect an improvement in the quality of the landfill, with the city's Waste Quality Index being 0.1 points lower than the previous year.

Between 2019 and 2022, Aparecida’s annual urban solid-waste generation remained essentially flat at roughly 28,500–28,550 kg. In 2023, however, that volume fell to 25,680 kg—a decline of nearly 10% from prior years—reflecting the success of local recycling campaigns and the strengthening of waste-picker cooperatives.

Over the same period, the city’s Landfill Quality Index dipped from 9.5 in 2019 to 8.5 in 2021, rebounded to 9.5 in 2022, and then edged down slightly to 9.4 in 2023. That sustained high rating indicates that, even as less material reaches the landfill, operational standards remain robust. To build on these gains, Aparecida could expand source-separation programs, deploy small-scale organic composting facilities, and implement digital tracking for recyclable streams—measures that would further relieve landfill pressure while enhancing transparency and overall efficiency in the city’s waste management system.



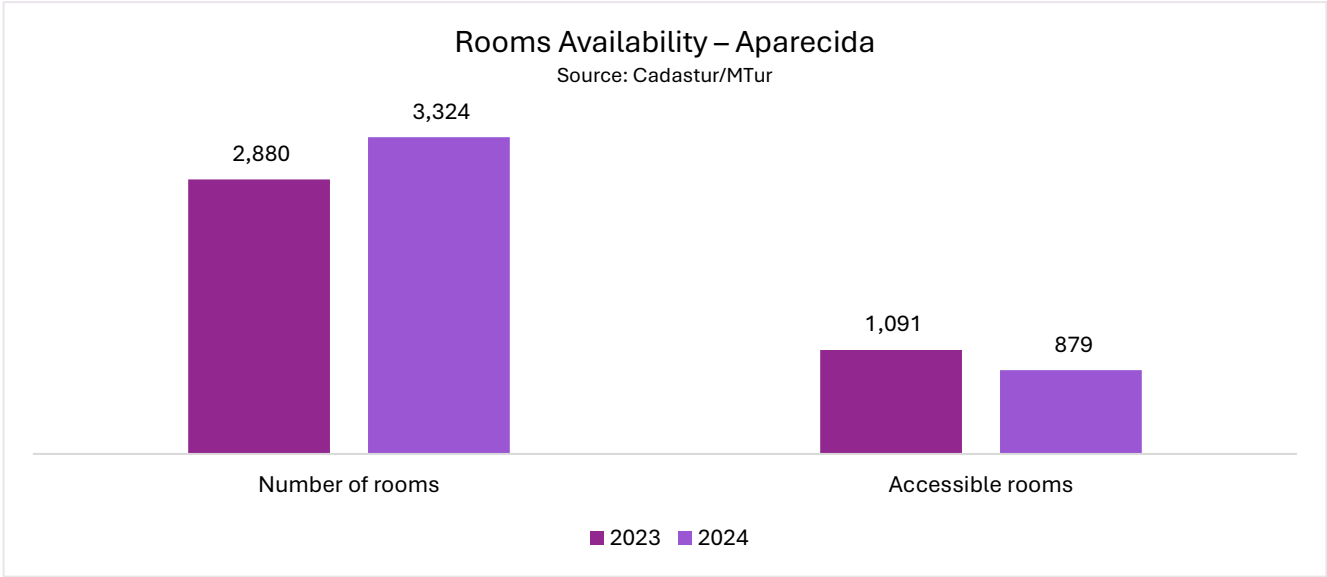
ACCOMMODATION FACILITIES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Aparecida had 3,324 rooms registered in the system in 2024, of which 879 were adapted for accessibility.

When compared to 2023, there was an increase in the number of rooms made available, but a decrease in the proportion of accessible rooms.

Regarding hotel occupancy in Aparecida, neither the city nor the tourist region participated in the monthly surveys coordinated by ABIH-SP for the year 2024, making it impossible to collect data.

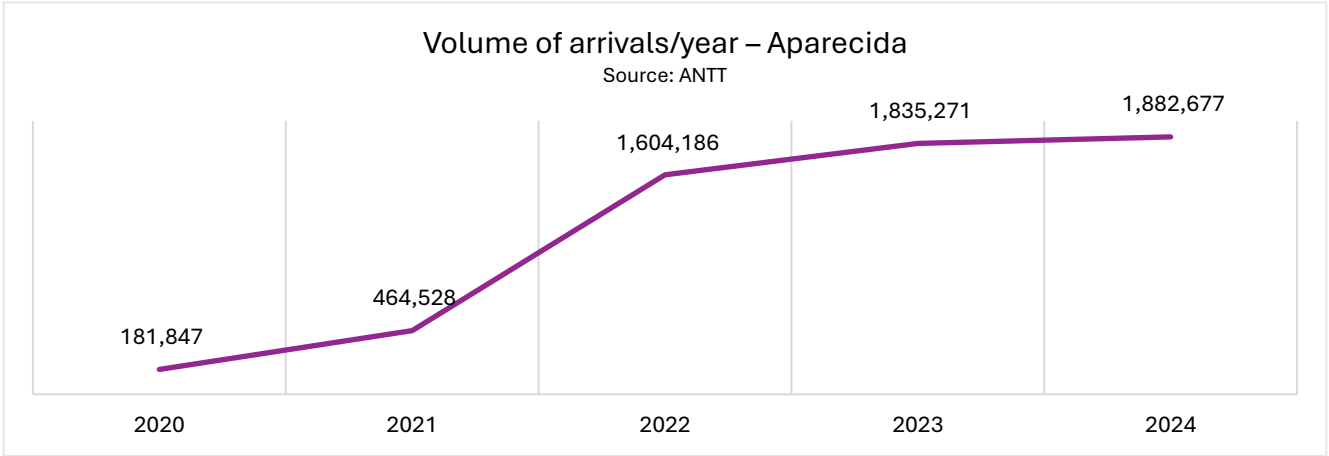
In 2024, Aparecida’s total room inventory grew by roughly 15%—climbing from 2,880 to 3,324 units—but accessible rooms actually declined by about 19%, from 1,091 to 879. As a result, the share of accessible accommodations plunged from nearly 38% of the total stock in 2023 to just 26% in 2024. This divergence implies that recent capacity expansion has not incorporated universal-design principles, potentially excluding travelers with reduced mobility at a time when inclusive tourism is on the rise. Compounding this challenge, the absence of hotel-occupancy data for 2024 hampers precise demand forecasting and market segmentation. To address both gaps, local authorities and industry stakeholders should tie permitting incentives and financing programs to accessibility targets—ensuring new developments include a minimum percentage of adapted units—and supplement ABIH-SP surveys with municipal or digital-platform occupancy monitoring. Such measures will help Aparecida balance growth with inclusivity, ensuring that all visitors can access its hospitality offerings.



VISITOR ARRIVALS

Most arrivals to destinations in the state of São Paulo are by land. By monitoring passenger arrivals in occasional and tourist charter vehicles, it can be seen that the city of Aparecida, after recovering from the drop in volume in 2020 and 2021, reached an annual volume of around 1.8 million visitors for both 2023 and 2024.

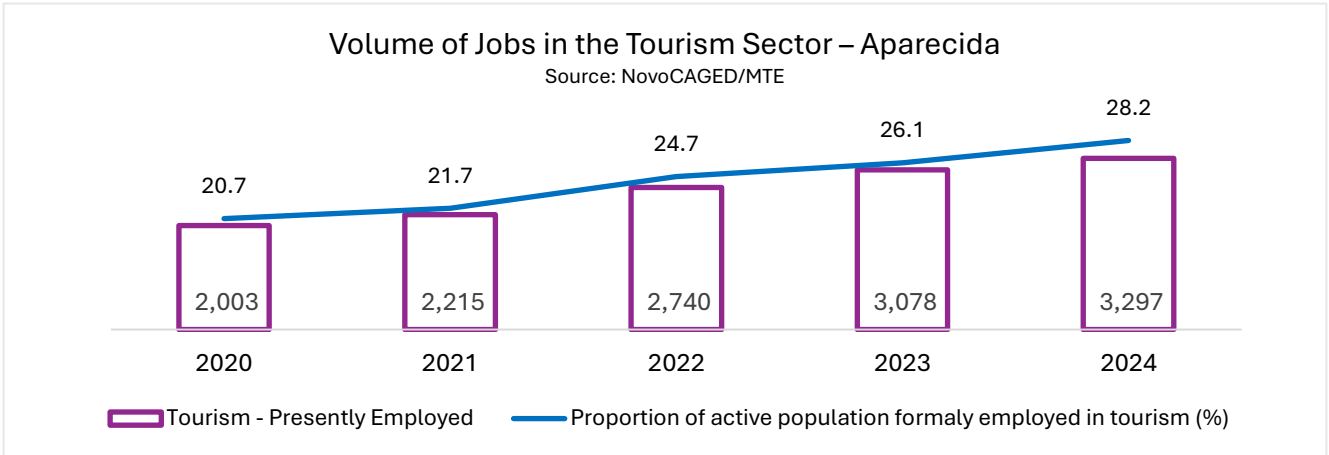
The flow of visitors to the city is most intense in September and October, when the feast of Brazil's patron saint, Our Lady of Aparecida, is celebrated, and the city receives more than 300,000 visitors during this period.



DIRECT FORMAL JOBS IN THE TOURISM SECTOR

The volume of direct formal jobs in tourism-related activities has been growing steadily in the city of Aparecida, with 3,297 people directly employed by the end of 2024. Last year alone, 219 new direct formal jobs were created for tourism in the city.

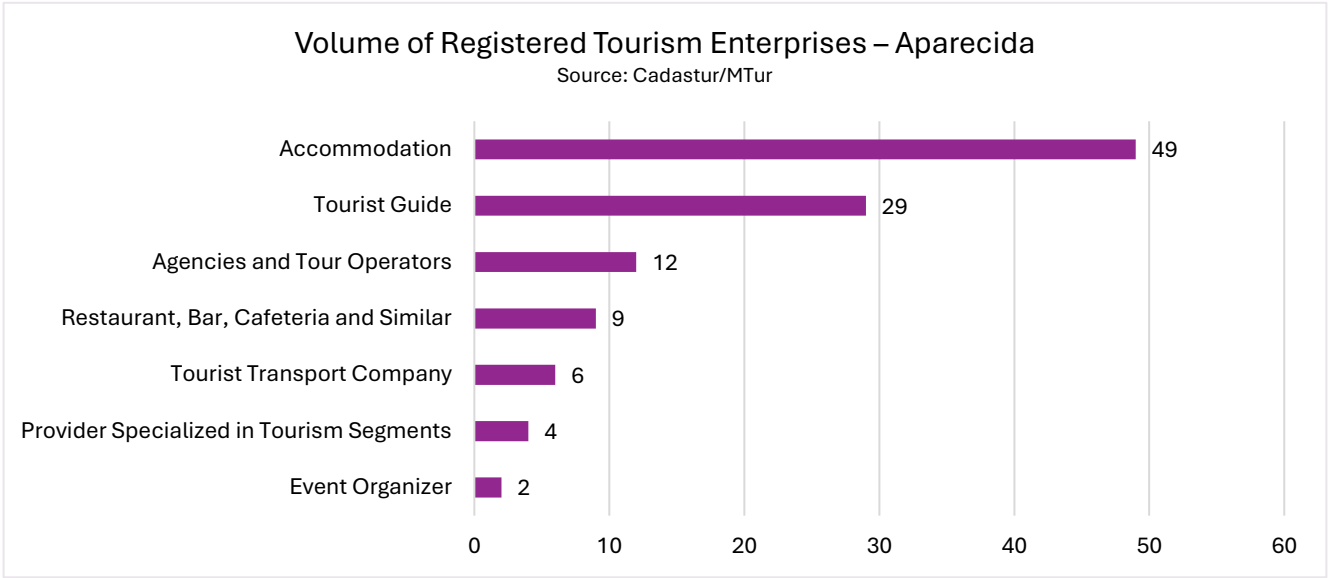
The proportion of people employed in tourism compared to the total number of activities has also increased. Currently, tourism activities represent 28.2% of the city's workforce.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Aparecida had 111 enterprises registered in the system in 2024.

The largest volume of registrations is for accommodation (49 registrations), with tourist guides in second place (29 registrations), followed by agencies/tour operators (12).



BROTAS – NATURE AND ADVENTURE

Brotas, located in central São Paulo state, is known as the "Adventure Capital" due to its vast offering of ecotourism and adventure tourism. The city, which received the title of Tourist Resort in 2014 and has a population of approximately 23,000, attracts visitors with its waterfalls, rapids of the Jacaré-Pepira River, and natural landscapes ideal for sports such as rafting, tubing, tree climbing, and ziplining. Beyond adventure, Brotas offers leisure options for all ages, with culinary itineraries and cultural attractions.

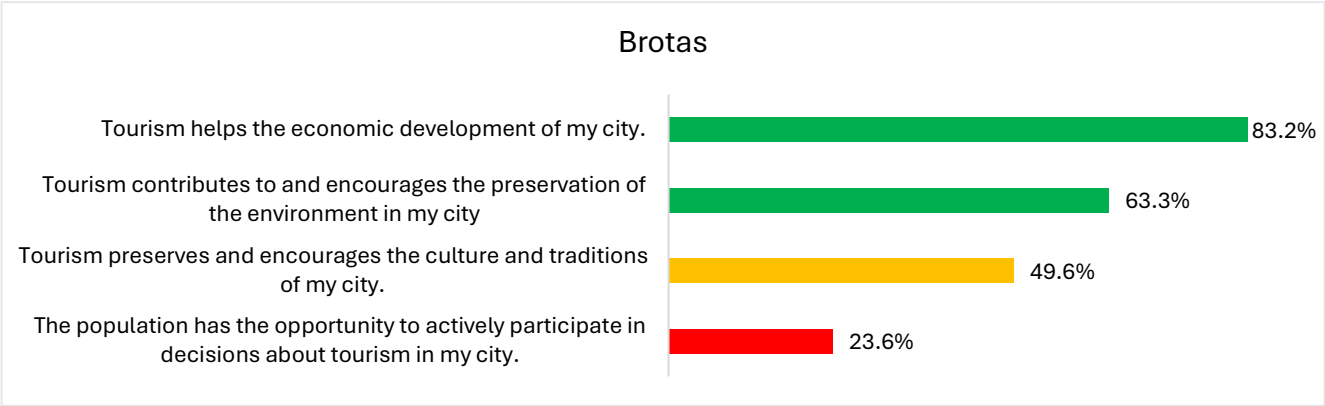
The city emerged from the construction of the Santa Cruz Chapel in 1839, with its initial development linked to coffee production and, more recently, to ecotourism. Brotas offers a variety of leisure and entertainment options for different types of tourists, including ecotourism and adventure tourism, rural tourism, cultural activities, and gastronomy.



Saltos Park. Photo by Douglas Piton

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Brotas had a total of 246 answers to the survey. Together with five other cities in the Serra do Itaqueri tourist region, which is a region permeated by nature, culture and history, and of which Brotas is the main destination, there were 961 responses to the survey in total.



Considering the proportion of residents who agreed with the statements presented in the survey, we can see that there is a positive view of the economic and environmental impacts of tourism. However, when it comes to sociocultural issues, the percentage of the population that considers the impact positive is a little below 50%, which is a reason for concern. The issue of governance and population participation in decision-making demands immediate attention, given that only 23.6% of the region's population agrees that there is civil society participation.

Source: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Aparecida has a positive assessment for 2024 and good expectations for 2025.

The fact that the assessment for international tourism is slightly higher than that for domestic tourism is due to recent participations of Brotas in international adventure tourism trade fairs and investment in international marketing, leading to an increase in the volume of international tourists arriving in the region.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat's Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The municipality of Brotas has 147 declared establishments, whether they are tourist facilities or attractions. Of these, 32% have some type of accessibility.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS



According to the Sustainable Development Index of the State of São Paulo the city of Brotas has improved in 12 out of the 17 sustainable development goals when comparing the years 2023 and 2020. Two goals remained unchanged and there was a worsening in the status of three goals, which led to a drop in the general punctuation from 60.2% to **57.7%**, keeping the city in an **average level of sustainable development**. Highlights to clean water and sanitation goals, affordable and clean energy goals and life below water goals which stand above 80%.

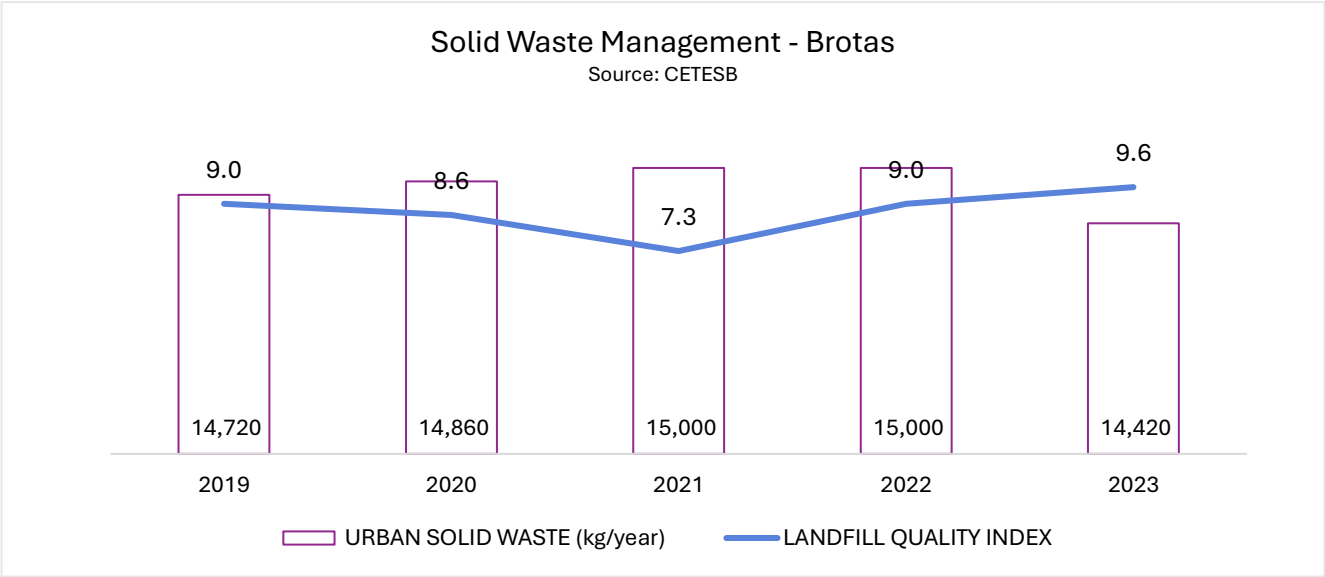
Source: <https://idsc.cidadessustentaveis.org.br/profiles/3507902/>

SOLID WASTE MANAGEMENT

Compared to previous years, when solid waste production in the city of Brotas was around 15 thousand kilos per year, 2023 showed a slight drop of approximately 1 thousand kilo. This number is mainly the result of local recycling campaigns. The drop in the volume of solid waste also caused an improvement in the quality of the landfill, with the city's Waste Quality Index being 0.6 points higher than the previous year.

Between 2019 and 2021, Brotas saw urban solid-waste volumes sent to landfills inch up from 14,720 kg to 15,000 kg, even as its Landfill Quality Index slipped from 9.0 to 7.3—signaling early teething problems in waste processing. From 2022 onward, disposal volumes stabilized and then fell to 14,420 kg in 2023 (a 4 % reduction), while the Quality Index rebounded sharply to 9.0 and then to 9.6. This simultaneous drop in tonnage and rise in performance reflects the success of local recycling campaigns and the professionalization of waste-picker cooperatives.

To build on these gains, Brotas could expand door-to-door source separation, install small-scale composting facilities for organic waste, deploy digital tracking (QR or RFID) for recyclable streams, and pilot energy-recovery technologies for residuals—measures that would deepen its circular-economy model and further relieve pressure on landfill capacity.

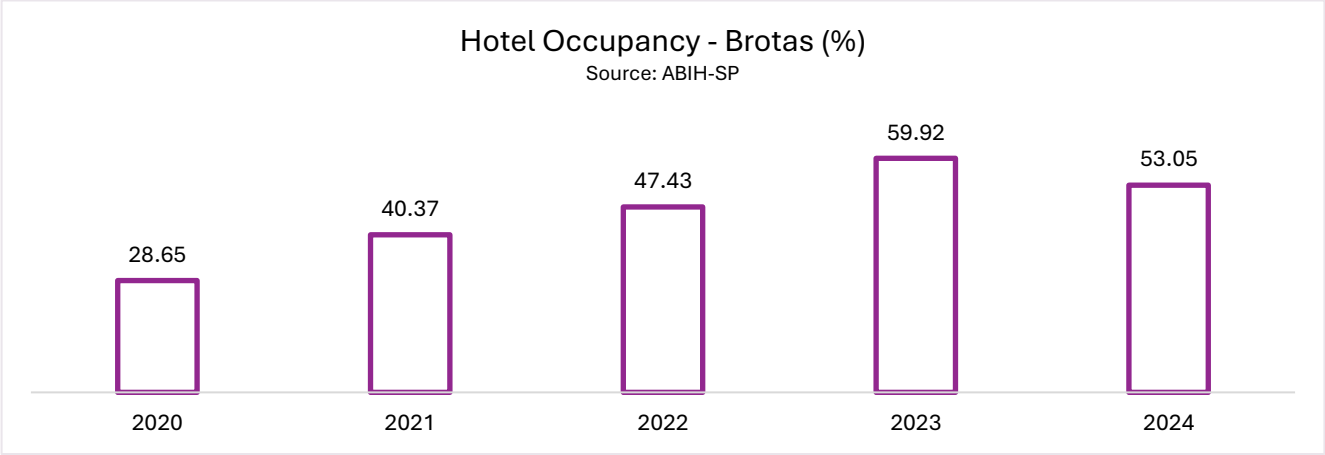


ACCOMMODATION FACILITIES

In 2024, Brotas’s accommodation universe comprised 488 rooms registered in Cadastur—the Ministry of Tourism’s National Registration System for Individuals and Legal Entities in the Tourism Sector—of which just 43 units (approximately 8.8%) were adapted to meet accessibility standards. This relatively small share of universally accessible rooms underscores an important challenge for the city: as Brotas seeks to welcome a broader spectrum of travelers, its hospitality stock must evolve to include guests with reduced mobility or special needs.

According to the Brazilian Hotel Industry Association, the city recorded an average annual occupancy rate of 53.05% in 2024, a figure that falls squarely within its historical range of 52 to 63%. After staging an impressive recovery—rising from a pandemic-era low of 28.6% occupancy in 2020 to a high of 59.9% in 2023—the market stabilized at 53.1% last year. This plateau suggests that much of the pent-up demand generated by the easing of travel restrictions has been absorbed, and without fresh stimuli, occupancy levels are unlikely to climb further on their own.

To reinvigorate growth and address the inclusivity gap, local operators and policymakers should consider a multi-pronged strategy. First, implementing dynamic, data-driven pricing during off-peak periods can attract budget-conscious travelers and smooth demand fluctuations. Second, targeted digital marketing campaigns—focusing on emerging niches such as eco-tourism, wellness retreats and accessible travel—will help Brotas stand out in a crowded online marketplace. Third, incentivizing the retrofitting of additional rooms for universal design, through grants or expedited permitting, will expand the city’s appeal to families, seniors and visitors with disabilities. Finally, investing in staff training on inclusive service practices and forging partnerships with tour operators that specialize in accessible travel experiences will ensure that Brotas’s accommodations not only fill more beds but also deliver comfort and dignity to every guest.

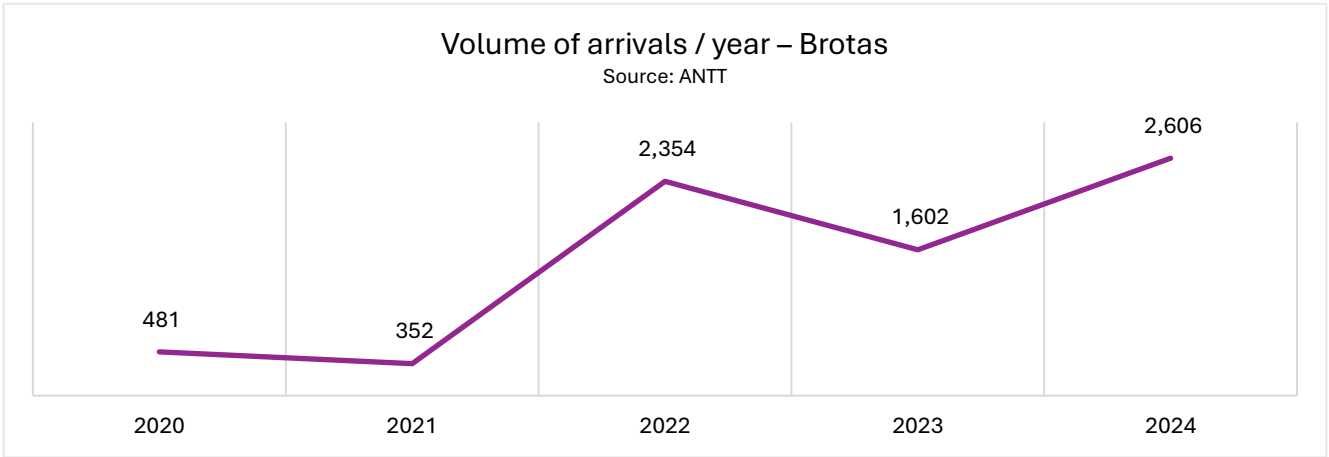


VISITOR ARRIVALS

Most arrivals to destinations in the state of São Paulo are by land. By monitoring passenger arrivals in occasional and tourist charter vehicles, it can be seen that the city of Brotas, after recovering from the drop in volume in 2020 and 2021, reached a peak in volume of over 2,6 thousand visitors in 2024.

Due to the region's pleasant climate, Brotas receives tourists throughout the year, with the highest volume during the school holidays in December and January.

After plunging to just 481 charter-bus arrivals in 2020 and 352 in 2021 amid travel restrictions, Brotas experienced a dramatic rebound in 2022, when passenger numbers surged to 2,354—nearly a sevenfold increase year-on-year. In 2023, arrivals softened to 1,602, likely reflecting the stabilization of post-pandemic demand and the need to rebuild event calendars and group-tour packages. However, 2024 saw a fresh peak of 2,606 visitors, eclipsing even the initial recovery high and underscoring Brotas’s growing appeal as a land-based leisure destination. This trajectory highlights two key dynamics. First, the city’s pleasant climate and natural attractions continue to draw school groups and leisure travelers in December and January, driving strong seasonality that must be anticipated in capacity planning. Second, the volatility of the 2022–23 period suggests that reliance on a few peak-season events leaves the destination vulnerable during shoulder months. To smooth these swings and capitalize on the 2024 upswing, Brotas should invest in more granular, month-by-month monitoring of charter arrivals and link these data to local festivals, school calendars and weather patterns. On the operational side, expanding and digitizing parking and terminal facilities—complete with mobile booking, real-time occupancy dashboards and wayfinding apps—will help manage surges. Finally, integrating sustainable shuttle services and bikeshare options for last-mile connections will not only enhance visitor experience but also reduce traffic congestion and carbon emissions, ensuring that Brotas’s land-based tourism infrastructure can support both its current high-season peaks and its longer-term growth aspirations.



DIRECT FORMAL JOBS IN THE TOURISM SECTOR

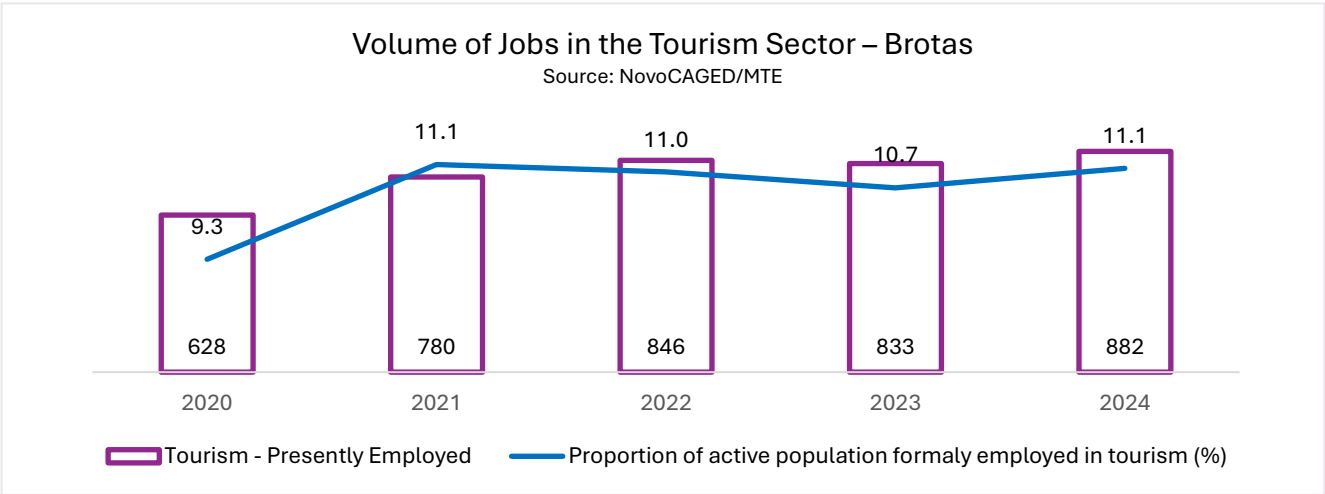
The volume of direct formal jobs in tourism-related activities has been performing well in the city of Brotas, with 882 people directly employed by the end of 2024. Last year alone, 49 new direct formal jobs were created for tourism in the city.

The proportion of people employed in tourism compared to the total number of activities is steady. Currently, tourism activities represent 11.1% of the city's workforce.

Between 2020 and 2024, Brotas’s formal tourism workforce expanded from 628 to 882 direct jobs—a growth of some 40%—and the sector’s share of the local labor force rose from 9.3% to 11.1%. After a strong rebound in 2021 (780 jobs; 11.1% share) and further gains in 2022 (846 jobs; 11.0%), the slight dip to 833 jobs in 2023 (10.7%) suggests that the initial post-pandemic hiring surge was followed by a brief plateau. The recovery resumed in 2024 with 882 positions, restoring the sector’s weight to its 2021 peak.

This sustained job creation underscores tourism’s growing role as an economic driver in Brotas, but the minor ebb in 2023 points to potential challenges in talent retention and skill alignment. To build a more resilient labor market, local stakeholders could develop tailored training programs in areas such as sustainable hospitality, digital marketing for small operators, and multilingual guiding services. Incentivizing apprenticeships or micro-grants for startups in niche segments—wellness retreats, adventure tours or accessible travel—would both deepen the skills base and diversify employment opportunities.

Moreover, embedding green practices into workforce development—by certifying eco-tourism professionals in low-impact operations, waste-reduction techniques and community-based conservation—can create higher-value roles while reinforcing Brotas’s environmental credentials. By combining targeted upskilling, inclusive hiring initiatives and alignment with sustainability standards, Brotas can ensure that its tourism sector not only continues to grow in headcount but also in quality, innovation and long-term resilience.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Brotas had 69 enterprises registered in the system in 2024.

The largest volume of registrations is for accommodation (26 registrations), with agencies / tour operators in second place (16), followed by tourist guides (7 registrations).



CAMPINAS – MICE AND QUALITY OF LIFE

Campinas, located 90 km from the state capital of São Paulo, is an important economic and tourist center in the state of São Paulo. The city stands out for its infrastructure, quality of life, and strong events and business sector, attracting both tourists and companies.

General Information:

Located in the Campinas metropolitan area, 90 km from São Paulo, the state capital. The city has over 1.1 million inhabitants and is the largest city in the state's interior.

The economy is strongly influenced by the services, commerce, technology, and industry sectors. It has an international airport, modern highways, a railway network, and a large bus terminal.

Campinas was recognized as a resilient city by the UN and stands out for its innovation and competitiveness. It stands out for its good quality of life, with extensive green spaces, leisure, and cultural venues.



Jockey Club Building. Photo by Paulo Li

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

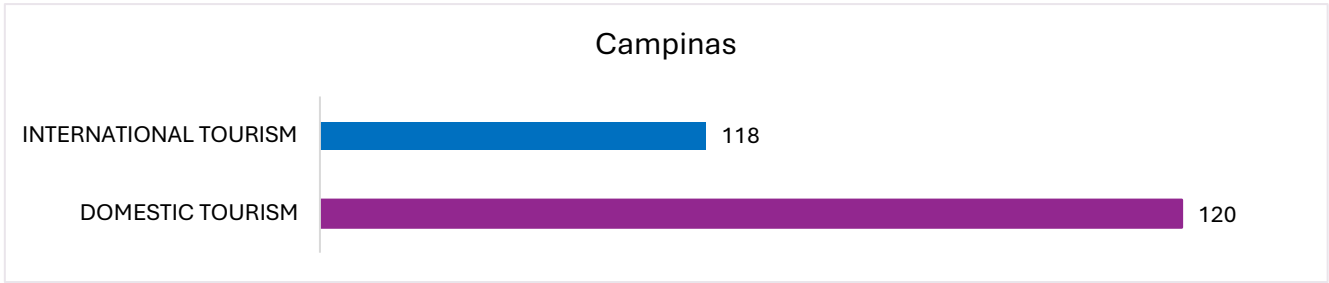
Neither the city of Campinas, nor the tourist region of which it is part participated in the 2024 edition of the Tourism Perception Survey among residents of the State of São Paulo.

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Campinas has a positive assessment for 2024 and good expectations for 2025.

The fact that the assessment for international tourism is lower than that for domestic tourism is due to the fact that the international tourist arriving at Campinas’s Airport does not usually stay in the city and heads to the Capital.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat’s Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The city of Campinas did not declare its accessibility inventory, making it impossible for CITE to monitor this aspect through this source.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS



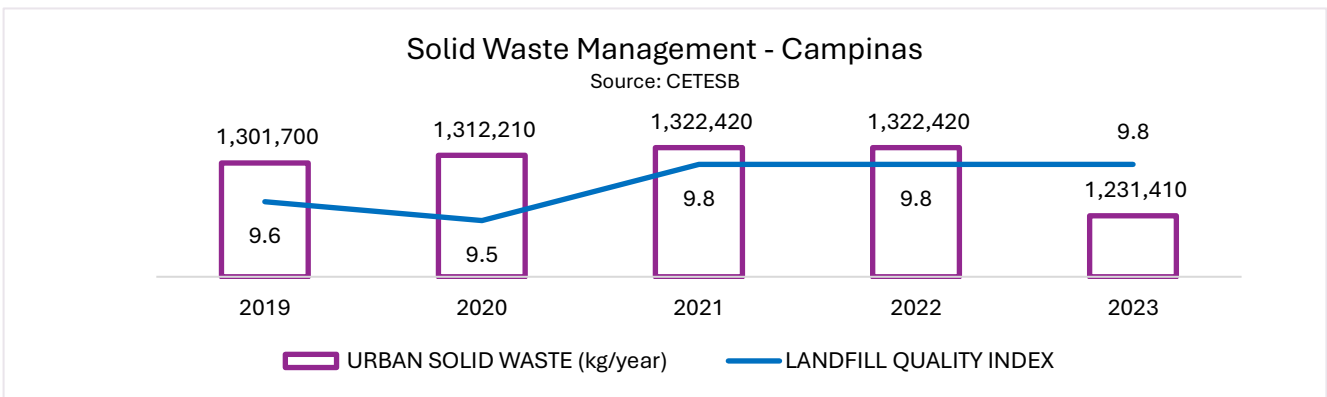
According to the Sustainable Development Index of the State of São Paulo the city of Campinas has improved in 11 out of the 17 sustainable development goals when comparing the years 2023 and 2020. Four goals remained unchanged and there was a worsening in the status of two goals, which led to a drop in the general punctuation from 60.9% to **56.3%**, keeping the city in an **average level of sustainable development**. Highlights to clean water and sanitation goals, affordable and clean energy goals and life below water goals which stand above 80%.

Source: <https://idsc.cidadessustentaveis.org.br/profiles/3509502/>

SOLID WASTE MANAGEMENT

Compared to previous years, when solid waste production in the city of Campinas was around 1,3 million kilos per year, 2023 showed a slight drop of approximately 1 million kilos. This number is mainly the result of local and state recycling campaigns. The drop in the volume of solid waste did not cause an improvement in the quality of the landfill, but the quality level was kept stable.

Also, the Landfill Quality Index held steady at a high 9.8, reflecting effective recycling campaigns and consistent operational standards.

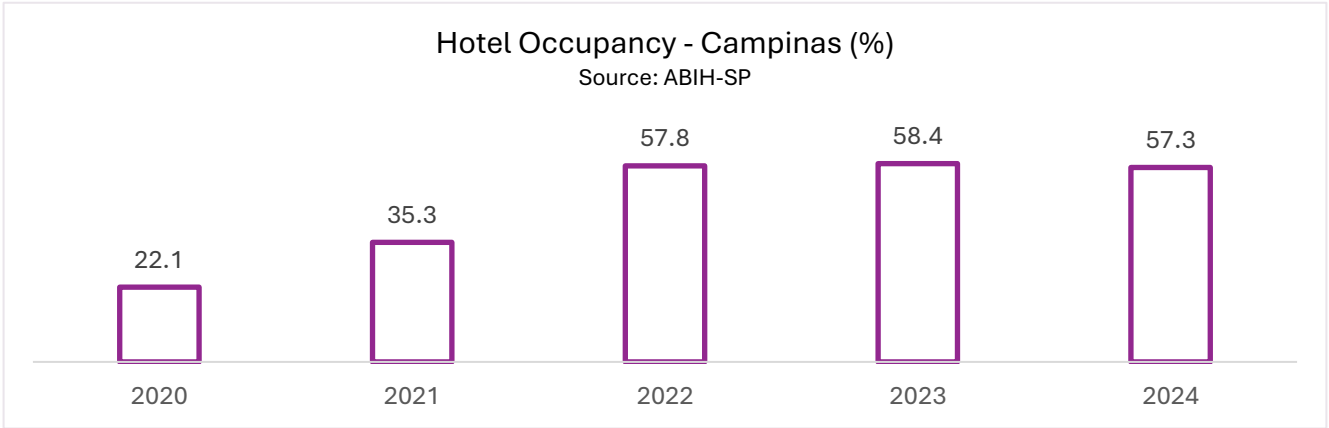


ACCOMMODATION FACILITIES

In 2024, Campinas’s accommodation network comprised 5,341 rooms—741 of which (about 14 %) were adapted for accessibility—while average occupancy held at 57.3 %, a slight dip from 58.4 % in 2023 but a dramatic recovery from the 22.1 % trough in 2020. This plateau suggests that the post-pandemic surge in demand has largely been absorbed, and without fresh incentives, room-night uptake may remain flat. At the same time, the limited supply of accessible units exposes a crucial inclusivity gap that risks sidelining families, seniors and travelers with reduced mobility—segments that offer significant growth potential in both domestic and international markets.

To transform this stabilization into sustainable growth, destination managers and hoteliers should pursue a two-pronged strategy. First, tie permitting incentives, tax breaks and green-financing lines to universal-design and eco-certification benchmarks, encouraging developers and existing operators alike to expand accessible and low-impact lodging options. Second, deploy smart-building technologies—such as IoT-enabled occupancy sensors, dynamic HVAC controls and real-time energy dashboards—to optimize utility consumption, reduce operating costs and demonstrate genuine sustainability credentials.

These measures should be complemented by data-driven revenue-management systems and targeted digital marketing campaigns aimed at niche segments—wellness retreats, corporate travel, cultural circuits—that can fill rooms in shoulder seasons and elevate RevPAR. By embedding inclusivity, innovation and resource efficiency into its accommodation ecosystem, Campinas can move beyond recovery, positioning itself as a truly intelligent and sustainable tourism destination.



VISITOR ARRIVALS

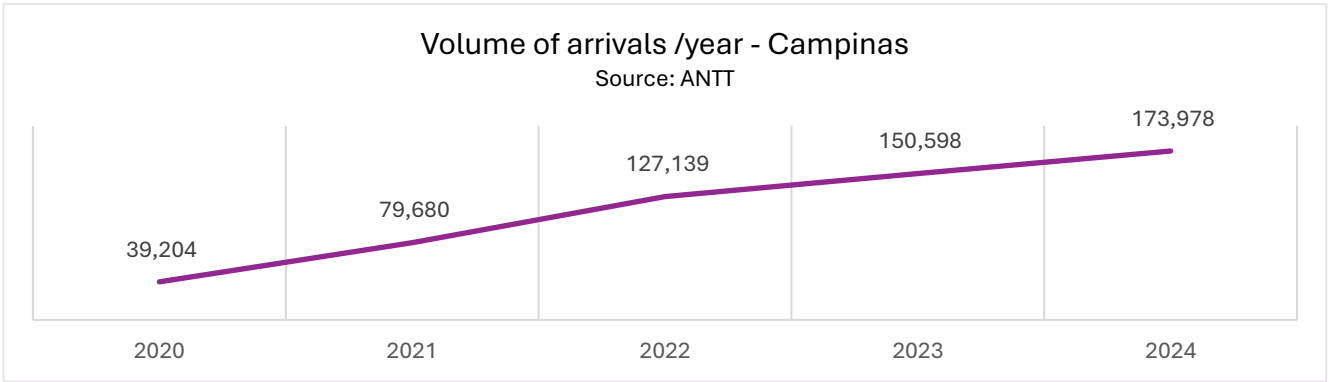
Most arrivals to destinations in the state of São Paulo are by land. By monitoring passenger arrivals in occasional and tourist charter vehicles, it can be seen that the city of Campinas has shown a constant growth in the volume of visitor arrivals, reaching almost 174 thousand arrivals in the city in the year 2024. The city has its peak of visitor arrivals in the month of September, due to the MICE activity in the city, and a certain increase in movement during Carnival.

Visitor arrivals to Campinas via charter vehicles have more than quadrupled since 2020, rising year-on-year from 39,204 to 173,978 in 2024. This uninterrupted growth highlights the city’s emerging role as a regional hub for group travel. However, such rapid expansion also exposes potential vulnerabilities in destination management: without careful coordination, the pressure of concentrated influxes can overwhelm transport networks, strain municipal services and elevate carbon emissions at precisely the times when sustainability goals demand restraint.

A smart-tourism approach would begin by integrating real-time arrival data with dynamic capacity dashboards across multiple systems—transport, accommodation, utilities and waste management—so that spikes in charter-bus influx trigger automated adjustments in road-traffic controls, shuttle frequency and staffing levels at visitor centers. Predictive analytics, informed by historical patterns and event calendars, could enable the city to smooth demand through targeted off-peak promotions or staggered scheduling of conference sessions, reducing the risk of bottlenecks and improving overall visitor experience.

On the sustainability front, Campinas should leverage its charter-bus dominance as an opportunity to decarbonize group mobility. Incentivizing low-emission or electric coach fleets—through expedited permitting, charging-station subsidies and preferential terminal access—would significantly cut tail-pipe pollution during peak months. Furthermore, by integrating charter services into a unified Mobility as a Service platform, visitors could seamlessly combine coach travel with last-mile e-shuttles, bike-share and mass transit, reducing reliance on private cars and enhancing accessibility across the city.

Ultimately, Campinas’s remarkable charter-bus growth offers a live testbed for an intelligent, sustainable tourism ecosystem. By fusing granular arrival analytics with demand-responsive operations, green-fleet incentives and multimodal connectivity, destination managers can transform episodic peaks into balanced, year-round flows—ensuring that the city’s economic gains from group travel are matched by social equity, environmental stewardship and operational resilience.



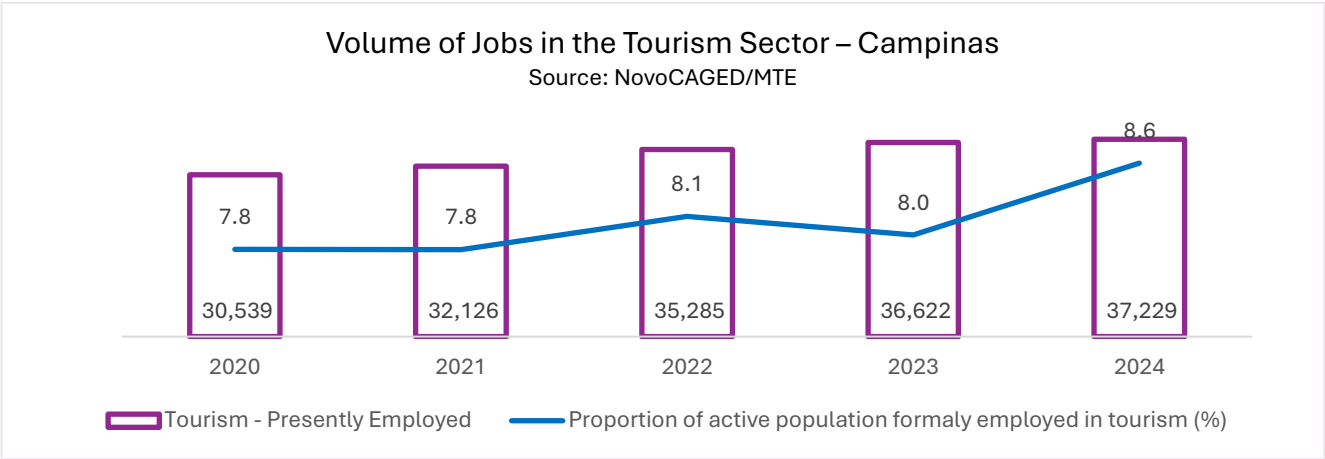
DIRECT FORMAL JOBS IN THE TOURISM SECTOR

The volume of direct formal jobs in tourism-related activities has been performing well in the city of Campinas, with 37 thousand people directly employed by the end of 2024. Last year alone, 607 new direct formal jobs were created for tourism in the city.

The proportion of people employed in tourism compared to the total number of activities recovered in 2024 after a slight drop in 2023, representing 8.6% of the city's total direct formal workforce.

Between 2020 and 2024, Campinas’s tourism sector expanded its formal workforce from 30,539 to 37,229 direct jobs, growing its share of the city’s total employed population from 7.8% to 8.6 %. After a robust surge in 2022—when 3,159 new positions were created—the rate of job growth dipped in 2023 before recovering with 607 additional roles in 2024, signaling both resilience and maturing dynamics. For destination managers aiming to harness this momentum sustainably, it will be crucial to invest in targeted upskilling—focusing on green hospitality practices, digital guest-experience platforms and multilingualism—while aligning training curricula with emerging market niches such as wellness retreats and cultural circuits.

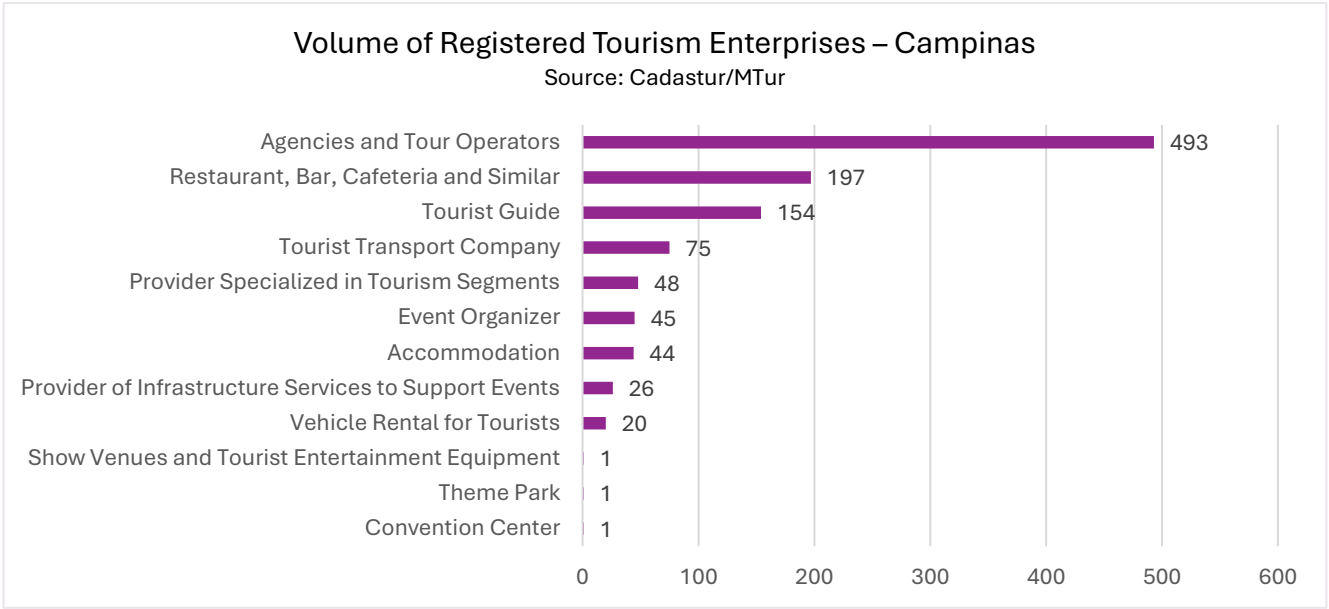
Establishing formal partnerships between local universities, vocational schools and tourism enterprises can ensure a steady pipeline of qualified, sustainability-minded professionals, strengthening Campinas’s capacity to deliver intelligent, high-value visitor experiences.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Campinas had 1,105 enterprises registered in the system in 2024.

The largest volume of registrations is for agencies / tour operators (493 registrations), with the food sector in second place (197), followed by tourist guides (154 registrations).



CAMPOS DO JORDÃO – MOUNTAIN CLIMATE AND CULTURE

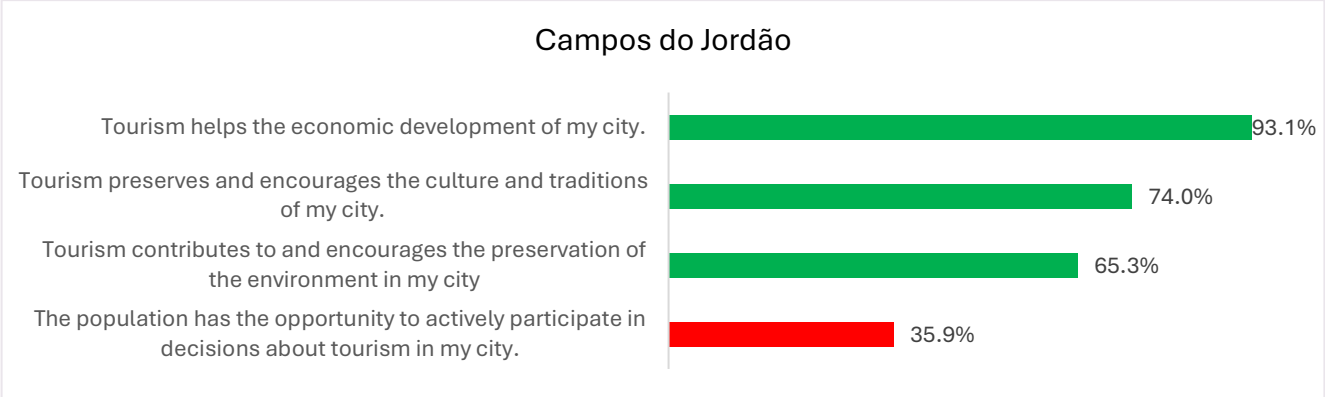
Campos do Jordão, known as the "Brazilian Switzerland," is a popular tourist destination in Brazil, especially during the winter, due to its cold climate and mountainous landscape. Located in the Mantiqueira Mountains, the city is the highest in Brazil, at an altitude of 1,628 meters. Its economy is heavily based on tourism, as well as the knitwear, chocolate, and mineral water industries. It has a population of 46,974 (IBGE - 2022) and a total area of 289,981 km².



Forest of Silence. Photo by Andre Rosa

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Campos do Jordão was unable to obtain a minimum sample for the 2024 perception survey, but the five cities in the Mantiqueira Mountain Range Tourist Region managed a sample of 685 responses and CITE chose to consider the regional result, as follows.



Considering the proportion of residents who agreed with the statements presented in the survey, we can see that there is a positive view of the economic, environmental and cultural impacts of tourism. However, the issue of governance and population participation in decision-making demands immediate attention, given that only 35,9% of the region's population agrees that there is civil society participation.

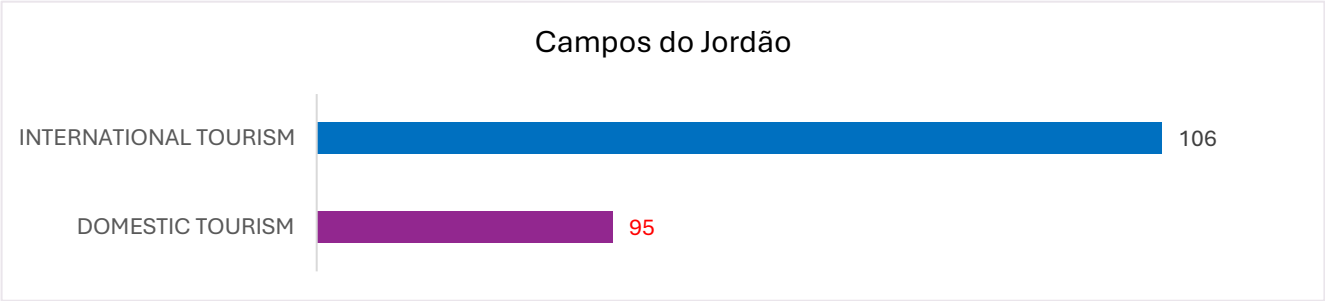
Source: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Aparecida has a positive assessment for 2024 and good expectations for 2025 concerning international tourism.

In terms of domestic tourism, the specialized market in Campos do Jordão did not evaluate 2024 positively, but even so, it has good expectations for 2025, leaving the final result very close to the average, but still low.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat's Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The municipality of Campos do Jordão has 1,428 declared establishments, whether they are tourist facilities or attractions. Of these, 22% have some type of accessibility.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS



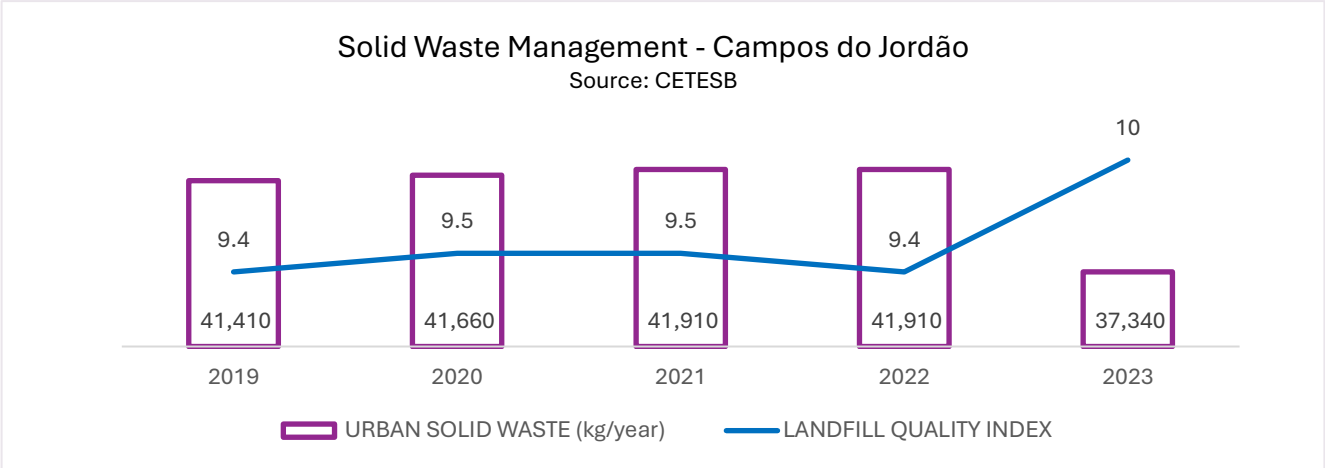
According to the Sustainable Development Index of the State of São Paulo the city of Campos do Jordão has improved in 13 out of the 17 sustainable development goals when comparing the years 2023 and 2020. Two goals remained unchanged and there was a worsening in the status of two other goals, which led to a drop in the general punctuation from 58.5% to **55.1%**, keeping the city in an **average level of sustainable development**. Highlights to clean water and sanitation goals and affordable and clean energy goals which stand above 80%.

Source: <https://idsc.cidadessustentaveis.org.br/profiles/3509700/>

SOLID WASTE MANAGEMENT

Between 2019 and 2022, Campos do Jordão’s annual urban solid waste generation remained remarkably stable at just over 41,000 kg per year. In 2019 the city produced 41,410 kg, rising slightly to 41,660 kg in 2020 and peaking at 41,910 kg in both 2021 and 2022. In 2023, however, the municipality achieved a significant reduction—dropping to 37,340 kg, a decrease of roughly 4,570 kg compared with the recent high—thanks largely to strengthened state recycling campaigns, expanded public-education efforts, and greater support for local cooperatives managing waste streams.

Meanwhile, the Landfill Quality Index—measured on a 0–10 scale—reflects both minor fluctuations and a strong rebound in disposal performance. After scoring 9.4 in 2019, the index climbed to 9.5 in 2020 and 2021, dipped back to 9.4 in 2022, and then surged to the maximum score of 10.0 in 2023. This upward trajectory underscores successful investments in landfill infrastructure, improved waste-sorting protocols, and enhanced environmental monitoring. Taken together, these trends demonstrate Campos do Jordão’s commitment to continuous improvement in sustainable waste management.



ACCOMMODATION FACILITIES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Campos do Jordão had 4,042 rooms registered in the system in 2024, of which 359 were adapted for accessibility.

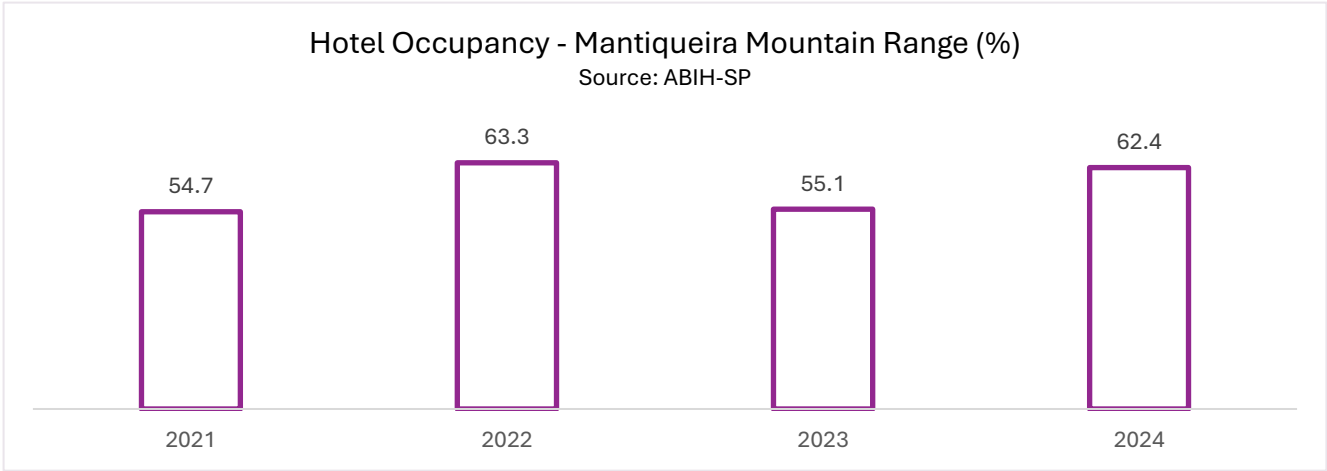
According to research by the Brazilian Hotel Industry Association, in relation to hotel occupancy in the Region of Mantiqueira Mountain Range, an annual average of 62.4% was recorded in 2024, representing a good recovery after the drop recorded in 2023.

After surging to 63.3% in 2022 amid post-pandemic demand, occupancy normalized last year, suggesting that market recovery is largely complete and future growth will hinge on fresh value propositions rather than lingering travel restrictions.

The modest share of accessible units points to an urgent inclusion challenge: as the region attracts families, seniors and visitors with mobility needs, its hospitality stock risks falling short of universal-design standards. To address both stabilization and inclusivity, destination managers should consider tying building permits and financial incentives to accessibility benchmarks and eco-certifications—encouraging operators to retrofit existing properties and exceed minimum requirements on new developments.

On the operational side, deploying IoT-enabled room-usage sensors and smart-thermostat systems can optimize energy and water consumption, especially during peak winter weekends when heating demand spikes. Meanwhile, dynamic pricing engines and targeted digital marketing campaigns—promoting off-season eco-experiences, wellness retreats and cultural festivals—will smooth occupancy across the calendar and deepen visitor engagement.

By weaving together universal design, resource-smart technologies and demand-shaping promotions, Campos do Jordão can transform its plateauing occupancy into a sustainable, year-round tourism model—one that welcomes all guests, conserves precious mountain resources and maintains its reputation as a premier destination in the Mantiqueira mountain range.



VISITOR ARRIVALS

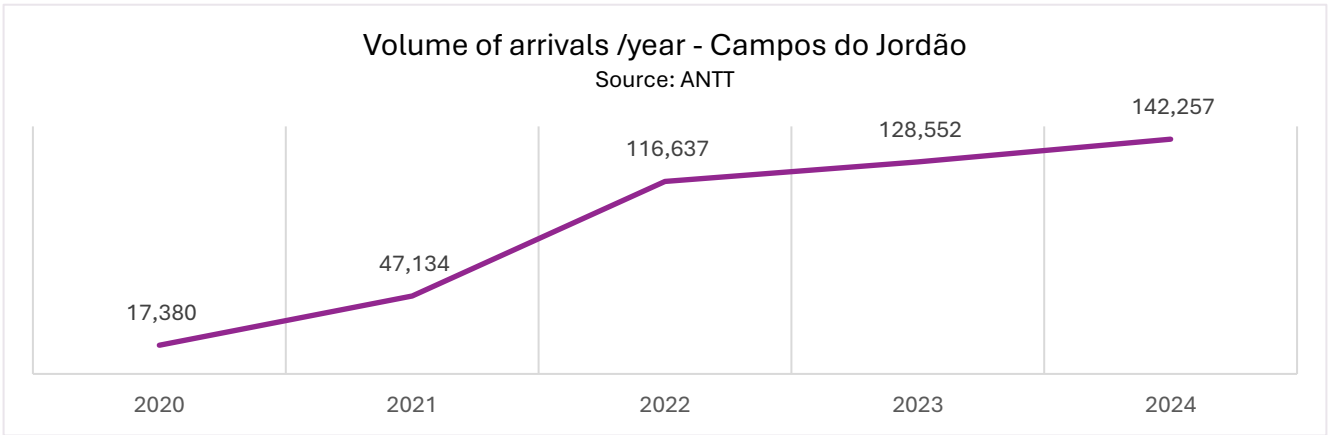
By monitoring passenger arrivals in occasional and tourist charter vehicles, it can be seen that the city of Campos do Jordão has attracted more and more visitors over the years, reaching the mark of 142 thousand arrivals in 2024.

Given that access to the city from the state capital and large cities in neighboring states is easy, most visitors arrive in Campos do Jordão using their own vehicles rather than chartered vehicles, which may find it difficult to get around the city given its topography.

Still, visitor arrivals to Campos do Jordão via charter buses have vaulted from just 17,380 in 2020 to 142,257 in 2024—a more than eightfold increase that underscores the city’s resurgence as a premier mountain retreat. Yet this surge represents only a slice of total visitor flows: given the area’s proximity to São Paulo and major highways, most guests still arrive in private vehicles, creating seasonal road congestion and parking challenges in the steep, narrow streets of the Mantiqueira range.

From a smart-destination perspective, Campos do Jordão must pivot from managing episodic coach spikes to orchestrating an integrated, low-carbon mobility ecosystem. First, deploying dynamic park-and-ride hubs on the city outskirts—linked to electric shuttle services operating on fixed routes and on-demand via a mobile app—would divert private cars from congested downtown areas while reducing tailpipe emissions. Second, real-time traffic-management platforms, powered by IoT sensors and predictive analytics, could adjust signal timings, recommend alternate corridors and trigger off-peak incentives (discounted shuttle fares, early-bird attraction tickets) to smooth arrivals across weekends and holidays.

Finally, embedding these mobility solutions within a broader digital framework—one that interconnects accommodation bookings, event calendars and resource-usage dashboards—will allow destination managers to monitor visitor pressure on utilities, optimize waste collection schedules and even forecast micro-climate impacts on energy and water demand. By marrying smart mobility, data-driven operations and sustainable transport incentives, Campos do Jordão can turn its steep growth in arrivals into a resilient, year-round tourism model that honors both visitor experience and mountain conservation.

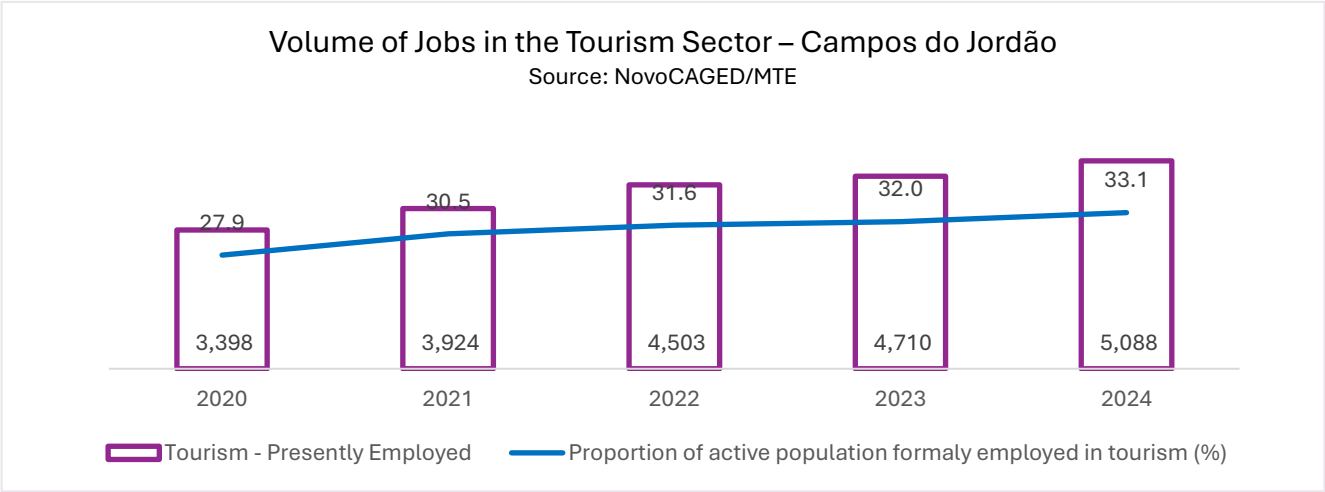


DIRECT FORMAL JOBS IN THE TOURISM SECTOR

The volume of direct formal jobs in tourism-related activities has been performing well in the city of Campos do Jordão, with 5,088 people directly employed by the end of 2024. Last year alone, 378 new direct formal jobs were created for tourism in the city.

The proportion of people employed in tourism compared to the total number of activities is steady. Currently, tourism activities represent one third of the city's workforce.

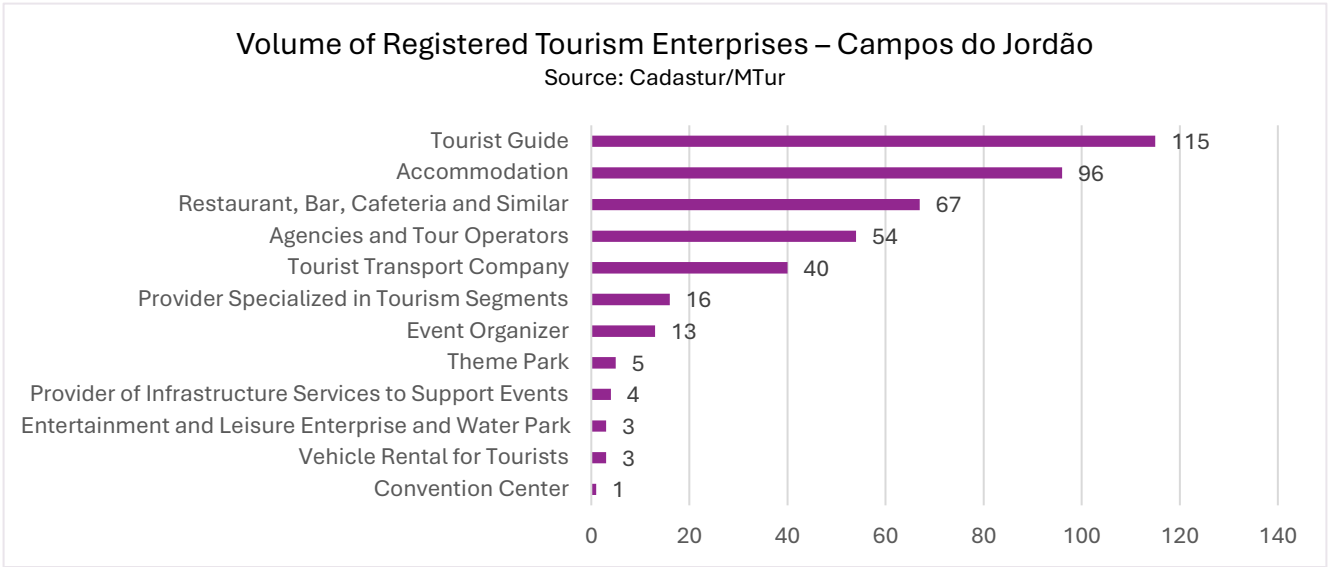
Between 2020 and 2024, Campos do Jordão’s tourism sector has added nearly 1,700 direct formal jobs—rising from 3,398 to 5,088 positions—while its share of the local workforce climbed steadily from 27.9% to 33.1%. This sustained expansion reflects the industry’s transition from post-pandemic recovery to a structurally stronger labor market, but it also creates new challenges in workforce quality, seasonality management and environmental footprint. To ensure these jobs deliver long-term value, destination managers should partner with vocational schools and hotels to develop curricula in sustainable hospitality practices (energy-efficient operations, waste reduction and community engagement) and digital guest-experience technologies (online booking, contactless services). Embedding continuous upskilling programs—such as micro-credentials in eco-tourism, language training for international visitors and data-analytics for demand forecasting—will not only boost service quality but also increase employee retention. Moreover, aligning hiring and training cycles with predictable seasonal peaks (winter weekends and summer festivals) can smooth staffing levels, preventing both understaffing during rush periods and costly layoffs in the low season. By coupling robust job creation with targeted capacity building and green credentials, Campos do Jordão can strengthen its tourism workforce as a pillar of intelligent, sustainable destination growth.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Campos do Jordão had 417 enterprises registered in the system in 2024.

The largest volume of registrations is for tourist guides (115 registrations), with accommodation in second place (96 registrations), followed by food sector (67 registrations).



ELDORADO – ECOTOURISM AND HISTORY

Eldorado is a tourist city located in the Ribeira Valley, in the state of São Paulo, known for its rich history, culture, and natural beauty. The city, also called Xiririca after its indigenous name, is known for its preserved Atlantic Forest, with much of its territory occupied by conservation units, such as the Jacupiranga State Park and the Intervales State Park.

The city has a population of 13,069 (IBGE - 2022) and an area of 1,654 km². Its terrain is mountainous, with deep valleys and crystal-clear rivers.

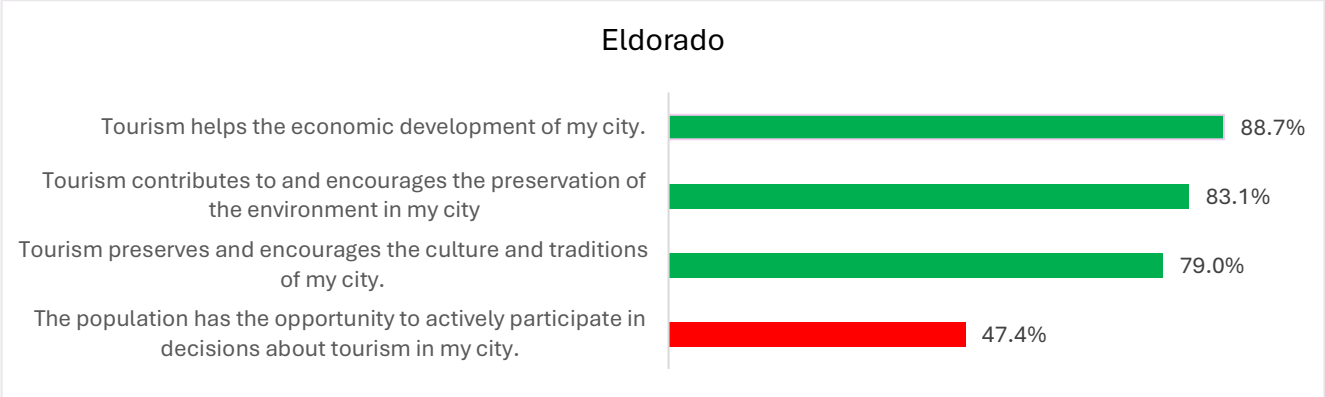
The city emerged during the gold rush, in the early 17th century, and the Ribeira Valley, where Eldorado is located, is recognized by UNESCO as a Natural World Heritage Site.



Devil's Cave. Photo by Ken Chu

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Eldorado was unable to obtain a minimum sample for the 2024 perception survey, but three cities in the Atlantic Forest Caves Tourist Region, including Eldorado, managed a sample of 441 responses and CITE chose to consider the regional result, as follows.



Considering the proportion of residents who agreed with the statements presented in the survey, we can see that there is a positive view of the economic, environmental and cultural impacts of tourism. However, the issue of governance and population participation in decision-making demands immediate attention, given that only 47.4% of the region's population agrees that there is civil society participation.

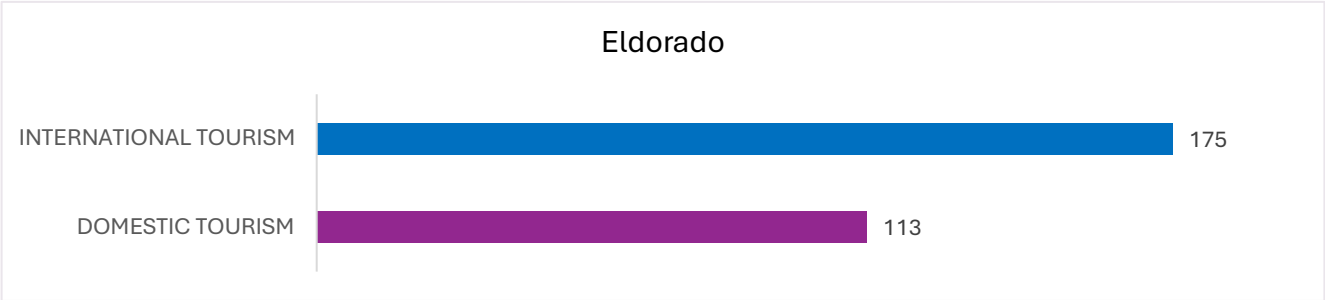
Source: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Eldorado has a positive assessment for 2024 and good expectations for 2025 concerning international and domestic tourism.

Proportionally, the city of Eldorado and the region receive a high number of international tourists, mainly due to its unique characteristics in ecotourism and historical tourism.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat's Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The municipality of Eldorado has 41 declared establishments, whether they are tourist facilities or attractions. Of these, 34% have some type of accessibility.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS



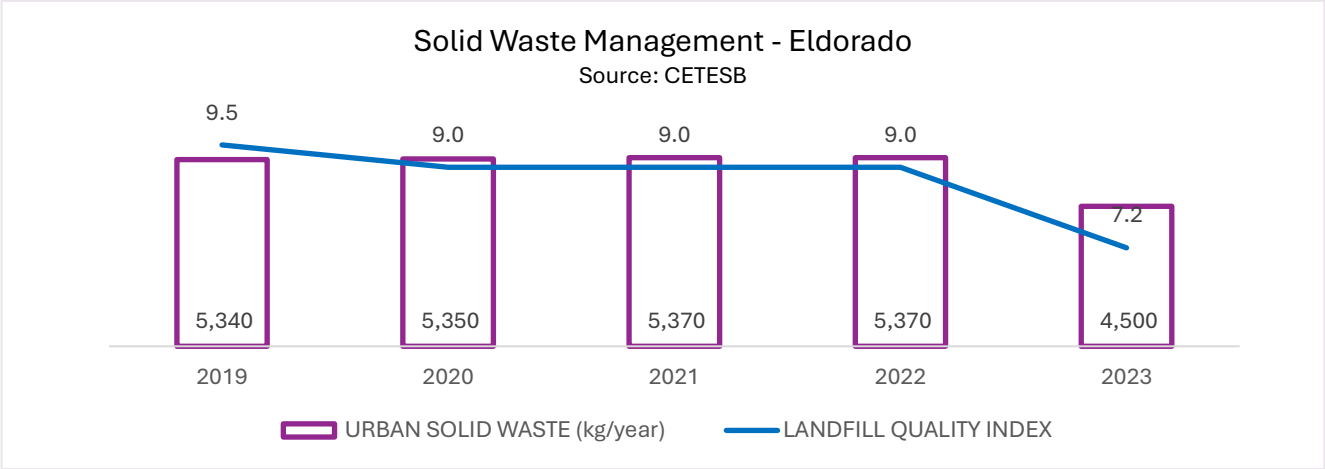
According to the Sustainable Development Index of the State of São Paulo the city of Eldorado has improved in 12 out of the 17 sustainable development goals when comparing the years 2023 and 2020. Two goals remained unchanged and there was a worsening in the status of three other goals, which led to an increase in the general punctuation from 57.6% to **59.4%**, keeping the city in an **average level of sustainable development**. Highlights to sustainable cities and communities goals and peace, justice and strong institutions goals which stand above 80%.

Eldorado: <https://idsc.cidadessustentaveis.org.br/profiles/3514809/>

SOLID WASTE MANAGEMENT

Between 2019 and 2022, Eldorado’s annual urban solid waste production held steady at roughly 5.3 tones per year, beginning at 5,340 kg in 2019, inching up to 5,350 kg in 2020, and reaching 5,370 kg in both 2021 and 2022. In 2023, however, the city achieved a notable reduction in waste volume—dropping to 4,500 kg, a decrease of nearly one thousand kilos compared with the recent peak. This decline likely reflects the impact of targeted recycling campaigns and heightened public engagement in waste-separation efforts, indicating that community initiatives can meaningfully curb overall waste generation even in smaller municipalities.

Despite this success on the waste-volume front, Eldorado’s Landfill Quality Index (on a 0–10 scale) tells a more concerning story. After a high of 9.5 in 2019, the index slipped to 9.0 from 2020 through 2022 and then plunged further to 7.2 in 2023—an almost two-point loss in the latest assessment. This downturn suggests that, although less material is reaching the landfill, deficiencies in landfill operations—such as compaction practices, leachate control, or environmental monitoring—have undermined disposal quality. To align waste reduction gains with true sustainability, Eldorado will need to pair community-driven source reduction with strategic investments in landfill infrastructure and management.



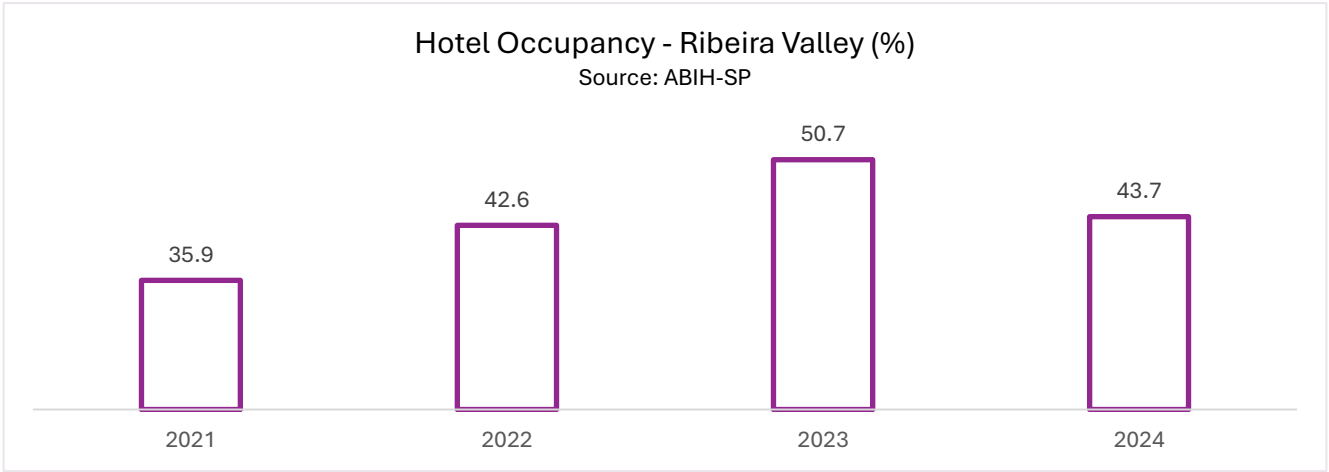
ACCOMMODATION FACILITIES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Eldorado had 27 rooms registered in the system in 2024, of which 3 were adapted for accessibility.

According to research by the Brazilian Hotel Industry Association, in relation to hotel occupancy in the geographic region of the Ribeira Valley, where Eldorado is located, an annual average of 43,7% was recorded in 2024. Occupancy levels in the region are normally low, due to the low supply of traditional accommodation and the visitor profile, which means that they choose to stay in campsites or glamping sites, which are not recorded in monthly surveys.

After rising from 35.9% in 2021 to a 50.7% peak in 2023, occupancy dipped back below 44% in 2024, underscoring the volatility caused by a shallow supply of traditional hotels. In practice, many visitors simply bypass the formal sector altogether, opting for campsites and glamping sites that fall outside official surveys, leaving destination managers with an incomplete picture of demand.

To build a smarter, more sustainable accommodation ecosystem, Eldorado should first integrate all lodging types—campgrounds, glamping and home-shares—into its digital registration and occupancy-tracking platforms, ensuring that data drives planning and promotion. Next, streamlining permits and offering technical support or tax incentives for small operators to retrofit or develop universally designed, eco-certified units would expand both capacity and inclusivity. Finally, deploying simple IoT sensors and real-time dashboards in key properties can optimize energy, water and waste flows during peak weekends, while targeted off-season marketing of nature-based retreats will help stabilize occupancy year-round. By weaving together comprehensive data collection, sustainable design standards and demand-shaping strategies, Eldorado can transform its under-sized hotel sector into a resilient, inclusive pillar of its green tourism brand.



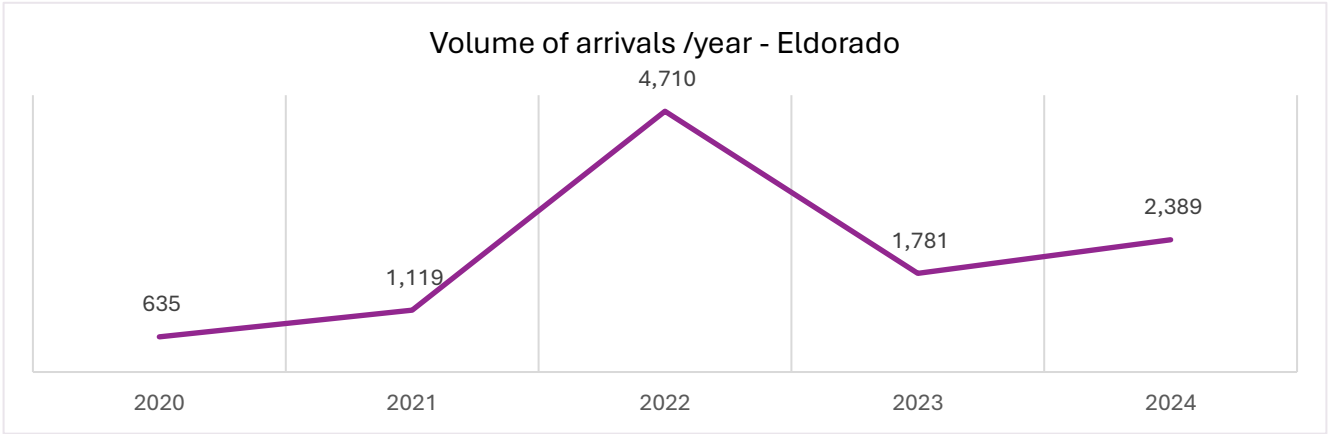
VISITOR ARRIVALS

Most arrivals to destinations in the state of São Paulo are by land. By monitoring passenger arrivals in occasional and tourist charter vehicles, it can be seen that the city of Eldorado had its peak of visitors in 2022, reaching the mark of 4,710 arrivals during the year.

This number is the result of an intense marketing campaign, started in mid-2021, in order to attract more tourists to the region, in addition to the Adventure Week in Ribeira Valley in October 2021. Unfortunately, marketing actions for the region were discontinued, which caused a drop in the volume of visitors from 2023 onwards.

To stabilize and grow visitor flows sustainably, Eldorado could deploy real-time arrival tracking—integrating ANTT data with local event calendars and weather forecasts—to identify demand gaps and trigger dynamic, micro-targeted promotions during off-peak months. Embedding a digital “destination hub” app would enable visitors to discover curated eco-tours, glamping experiences and community-led activities, smoothing highs and lows while dispersing tourists across the region.

Finally, anchoring marketing in a sustainable narrative—certifying local guides in low-impact practices, promoting carbon-neutral shuttle services and showcasing circular-economy initiatives at campsites—will not only broaden Eldorado’s appeal beyond thrill seekers but also reinforce its credentials as an intelligently managed, environmentally responsible destination.



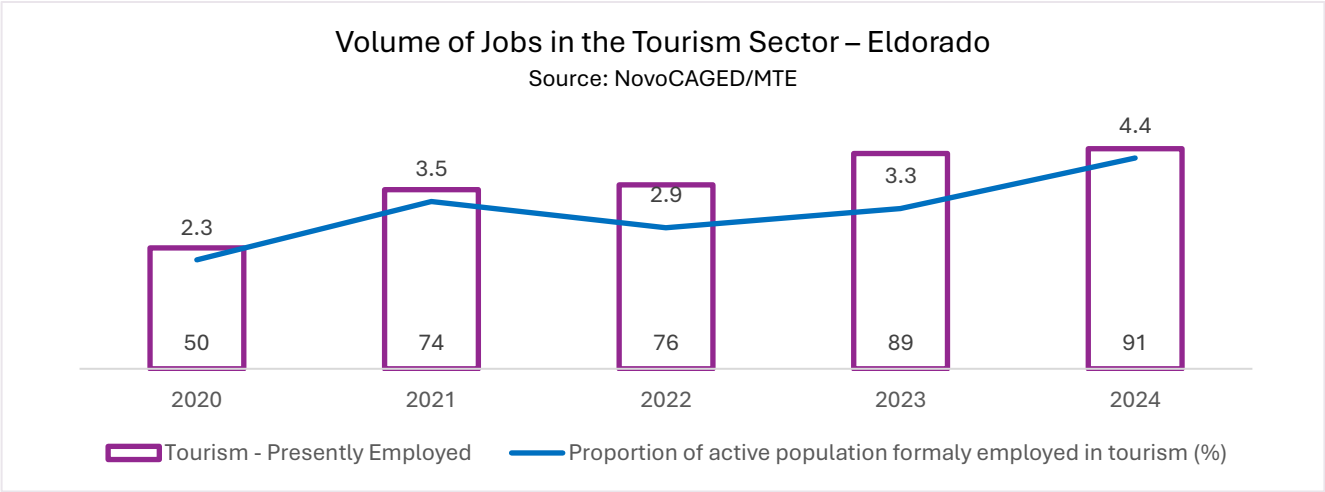
DIRECT FORMAL JOBS IN THE TOURISM SECTOR

The volume of direct formal jobs in tourism-related activities has not been performing as expected for a region with such tourism potential, with 91 people directly employed by the end of 2024. In 2024 only two new direct formal jobs were created for tourism in the city.

However, there is a slight increase in the proportion between the total number of people formally employed in the city and those working in tourism activities, giving us the impression that the issue of employment in the region is not restricted to the tourism sector.

Between 2020 and 2024, Eldorado’s formal tourism workforce grew modestly from 50 to 91 direct jobs—an increase of just 41 positions over five years—and its share of the local labor market climbed from 2.3% to 4.4%. After a peak addition of 24 jobs in 2021, growth plateaued, with only two w roles created in 2024, underscoring a disconnect between the region’s abundant natural and adventure-tourism assets and its ability to translate them into sustained employment.

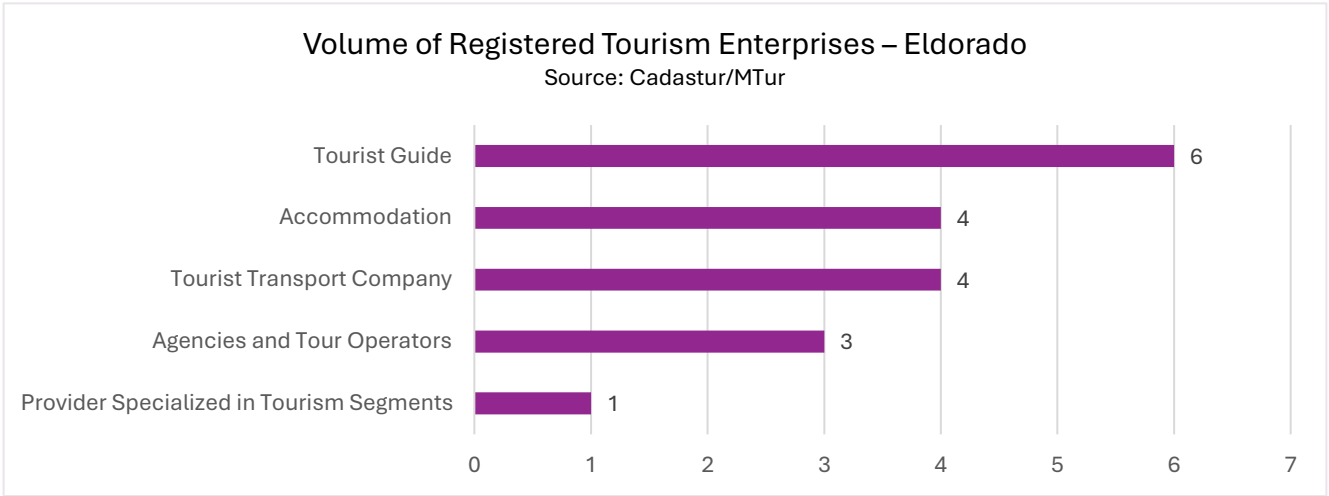
From a smart-destination perspective, this underperformance highlights the need for more integrated workforce and destination management. First, Eldorado should develop modular e-learning and micro-credential programs—partnering with vocational schools and online platforms—to quickly upskill residents in niche tourism services (e.g., eco-guiding, sustainable hospitality and digital marketing). Second, embedding tourism job data within a real-time “destination dashboard” can help local authorities monitor employment trends alongside visitor arrivals and utility usage, enabling targeted interventions—such as pop-up training booths at peak-season events—to fill critical skill gaps. Finally, aligning job creation with circular-economy initiatives—like community-run glamping collectives, agro-tourism cooperatives and micro-enterprise clusters for rental gear and e-mobility solutions—will diversify income streams, deepen local ownership and ensure that Eldorado’s workforce expansion is both economically inclusive and environmentally regenerative.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Eldorado had 18 enterprises registered in the system in 2024.

The largest volume of registrations is for tourist guides (6 registrations), with accommodation and tourist transport companies in second place (4 registrations), followed by agencies / tour operators (3 registrations).



ILHABELA – SUN, BEACH AND NATURE

Ilhabela, located on the northern coast of São Paulo, boasts a tropical climate and rich biodiversity, making it a popular destination. Tourism is the island's main economic activity, driven by its beaches, waterfalls, trails, and nautical events, such as the International Sailing Week.

Located on the northern coast of São Paulo, it is a marine archipelago composed primarily of São Sebastião Island. Ilhabela covers an area of 346,389 km² and has a population of approximately 36,329 (IBGE - 2022).

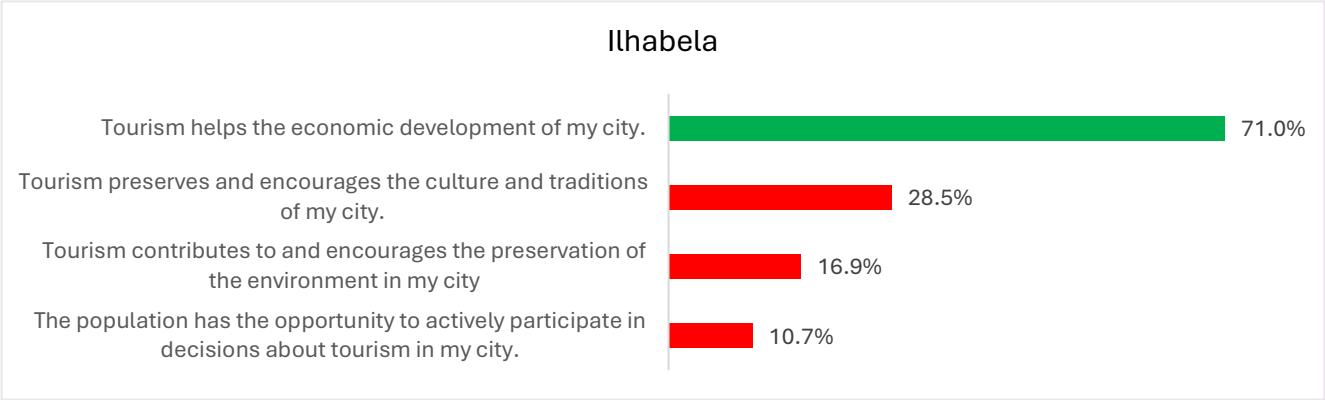
Ilhabela has more than 40 beaches, some deserted and others with good infrastructure, dozens of waterfalls and natural pools, and trails through the Atlantic Forest with views of beaches and waterfalls.



Engenho D'Água Farm. Photo by Priscila Rodrigues

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Ilhabela had a total of 208 answers to the survey. Together with three other cities of the North Coast tourist region, there were 1,294 responses to the survey in total.



Considering the proportion of residents who agreed with the statements presented in the survey, we can see that the population of Ilhabela believes that tourism brings economic benefits to the city, but nothing more. A study is needed to understand why the actions of the local government to protect the environment and promote local culture are not visible to the population. It is also necessary for the population of the municipality to be more involved in the local government's decision-making regarding tourism.

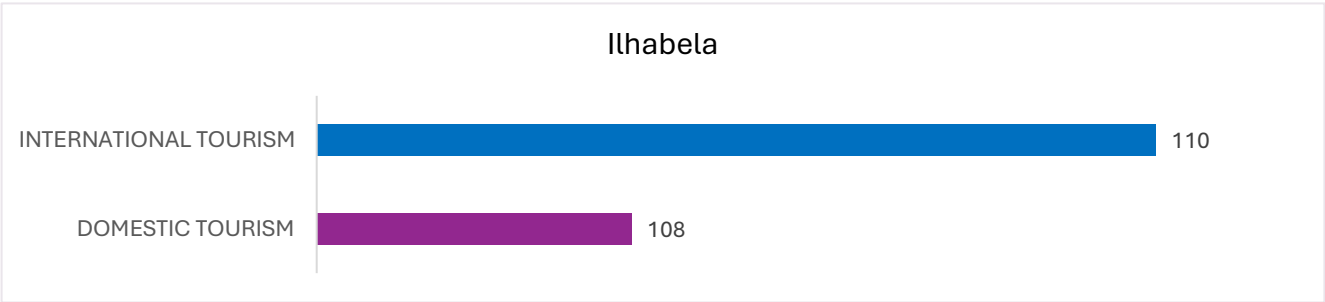
Source: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Ilhabela has a positive assessment for 2024 and good expectations for 2025.

The fact that the assessment for international tourism is slightly higher than that for domestic tourism is due to constant participations of Ilhabela in international tourism trade fairs and investment in international marketing, leading to an increase in the volume of international tourists arriving in the region.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat's Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The city of Ilhabela did not declare its accessibility inventory, making it impossible for CITE to monitor this aspect through this source.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS



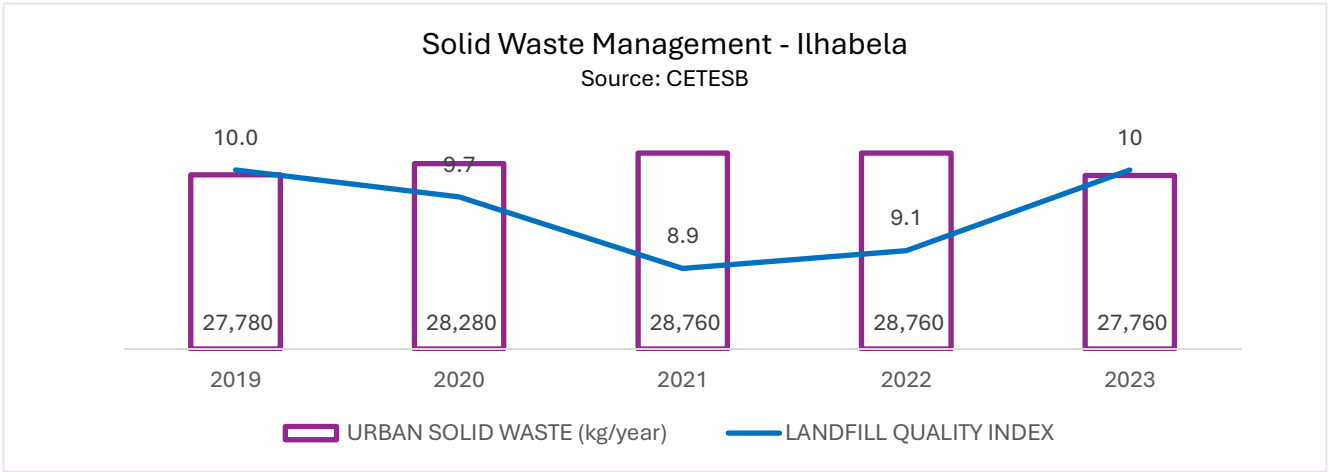
According to the Sustainable Development Index of the State of São Paulo the city of Ilhabela has improved in 11 out of the 17 sustainable development goals when comparing the years 2023 and 2020. Four goals remained unchanged and there was a worsening in the status of two other goals, which led to an increase in the general punctuation from 58.8% to **60.4%**, keeping the city in a **high level of sustainable development**. Highlights to affordable and clean energy goals and climate action goals which stand above 80%.

Source: <https://idsc.cidadessustentaveis.org.br/profiles/3520400/>

SOLID WASTE MANAGEMENT

Between 2019 and 2023, Ilhabela’s annual urban solid waste generation remained remarkably stable at roughly 28,000 kg per year, reflecting a well-entrenched waste management routine even as tourism and urban activity grew. In 2019, the city recorded 27,780 kg, which rose modestly to 28,280 kg in 2020 and peaked at 28,760 kg in both 2021 and 2022, before falling back to 27,760 kg in 2023—a reduction of about 1,000 kg compared to the recent high. This downward shift in 2023 is largely attributable to strengthened state and municipal recycling campaigns, enhanced public awareness programs, and closer coordination with local cooperatives, all of which have helped curb waste generation without compromising service levels.

Simultaneously, the Landfill Quality Index—which gauges the environmental performance of waste disposal sites on a 0–10 scale—mirrored these operational improvements. After maintaining a perfect 10.0 in 2019, the index dipped to 9.7 in 2020 and reached its lowest point of 8.9 in 2021, before climbing back to 9.1 in 2022 and reclaiming the maximum score of 10.0 in 2023. This full recovery underscores Ilhabela’s sustained investments in landfill upgrades, stricter waste-sorting protocols, and rigorous environmental oversight. Taken together, these trends attest to the municipality’s commitment to continuous enhancement of its waste management system and its broader sustainability objectives.



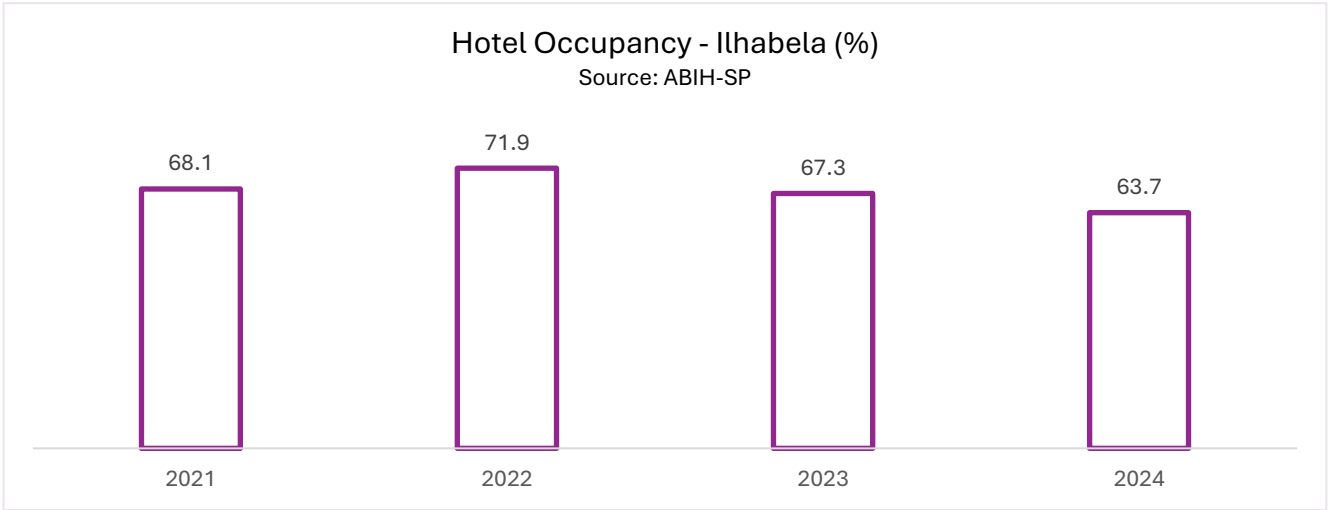
ACCOMMODATION FACILITIES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Ilhabela had 1,879 rooms registered in the system in 2024, of which 529 were adapted for accessibility.

According to research by the Brazilian Hotel Industry Association, in relation to hotel occupancy in the region, Ilhabela had an annual average of 63.7% was recorded in 2024.

Ilhabela’s hotel sector demonstrated strong post-pandemic performance—average occupancy climbed from 68.1% in 2021 to a peak of 71.9% in 2022—before easing to 67.3% in 2023 and 63.7 % in 2024. This gradual softening signals that while the island’s allure remains high, market saturation during peak seasons may be prompting greater price sensitivity or encouraging visitors to explore alternative stays such as pousadas, eco-lodges and short-term rentals. With 1,879 registered rooms—529 of which (28%) are accessible—Ilhabela enjoys a robust, inclusive bed base but must guard against over-reliance on high-occupancy bursts that strain local infrastructure and natural resources.

To manage occupancy more sustainably, destination planners should roll out dynamic demand-shaping tools—leveraging real-time booking data and weather forecasts to trigger off-peak promotions (e.g., wellness retreats during shoulder months) and modulate room rates according to projected loads. Embedding smart-building technologies in hotels—such as occupancy sensors, demand-controlled HVAC and water-recycling systems—can reduce per-guest resource consumption even when rooms are full. Finally, integrating occupancy dashboards with mobility and environmental monitoring will allow Ilhabela to anticipate visitor pressure on trails, beaches and waste-management facilities, enabling preemptive measures like staggered arrival slots or digital visitor caps. By combining intelligent demand management, resource-efficient operations and inclusive lodging options, Ilhabela can sustain healthy occupancy levels while preserving its unique coastal-forest ecosystem for future generations.

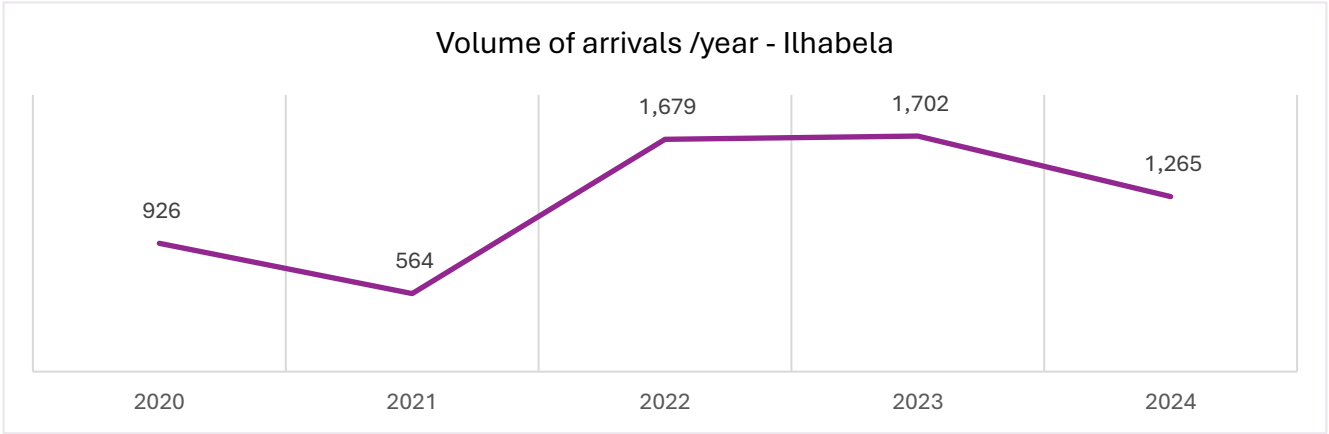


VISITOR ARRIVALS

Most arrivals to destinations in the state of São Paulo are by land. By monitoring passenger arrivals in occasional and tourist charter vehicles, it can be seen that the city of Ilhabela had its peak of visitors in 2023, reaching the mark of 1,702 arrivals during the year. 2024 showed a drop in the volume, reaching 1,265 visitors arriving by chartered vehicles.

It is interesting to consider that great part of the visitors who arrive in Ilhabela come by ferry or private boats. And the municipality is still studying a system to calculate an approximate volume of visitors using these two means of transportation.

Ilhabela’s charter-bus arrivals followed a familiar rebound pattern—falling from 926 in 2020 to 564 in 2021, surging to 1,679 in 2022 and a peak of 1,702 in 2023 before slipping back to 1,265 in 2024. This moderated decline highlights the island’s heavy reliance on one transport mode even as most visitors actually arrive by ferry or private boat. To capture a complete picture of demand, destination managers should integrate ANTT bus data with maritime passenger counts—using IoT sensors at docks and a unified digital dashboard—to inform resource allocation for peak weekends and festival periods. Moreover, embedding sustainable-mobility incentives—such as electric shuttle ferries, dockside solar charging and coordinated arrival windows—will not only reduce emissions but also smooth visitor flows across modes. By combining robust multimodal tracking, data-driven capacity planning and green transport solutions, Ilhabela can better manage its seasonal peaks and deliver a seamless, environmentally responsible experience for all travelers.

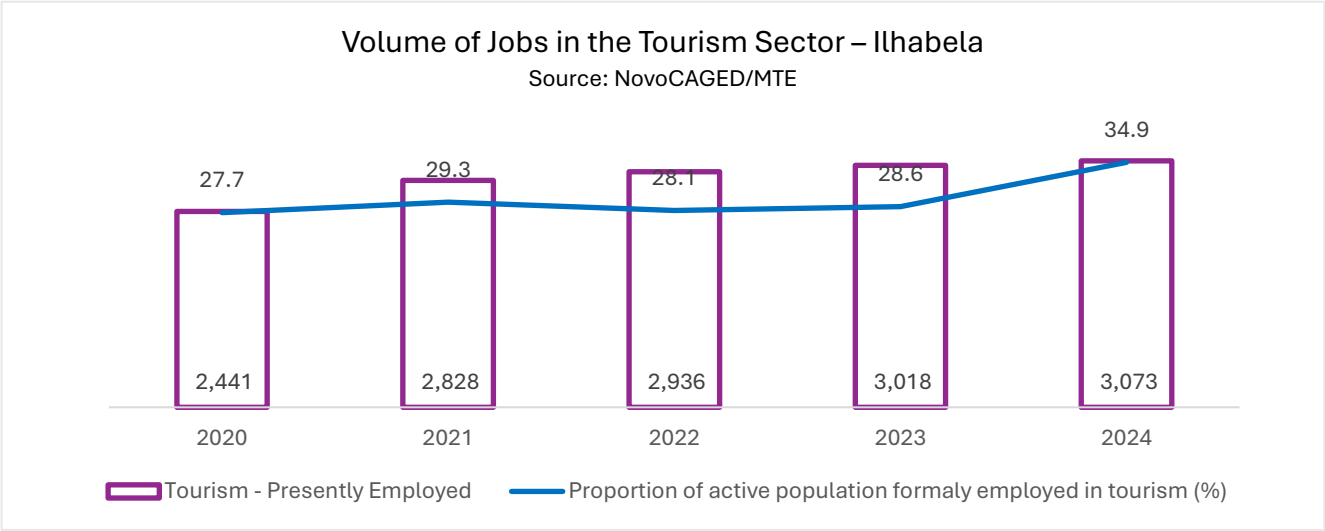


DIRECT FORMAL JOBS IN THE TOURISM SECTOR

The volume of direct formal jobs in tourism-related activities has been performing well in the city of Ilhabela, with 3,073 people directly employed by the end of 2024. Last year, 55 new direct formal jobs were created for tourism in the city.

The proportion of people employed in tourism represent 34.9% of the city's total direct formal workforce.

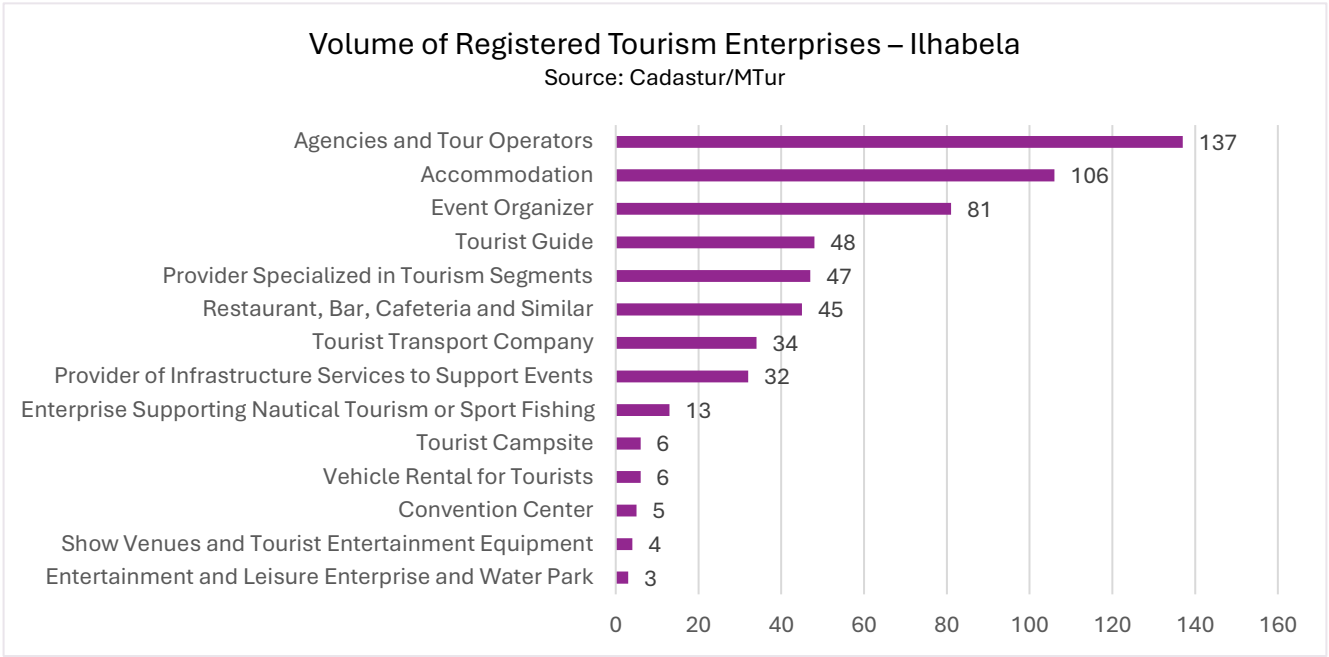
Between 2020 and 2024, Ilhabela’s tourism sector expanded its formal workforce from 2,441 to 3,073 jobs—a solid increase of 26%—while its share of the city’s total employed population jumped from 27.7% to 34.9%. Early gains were steady but modest, with employment and labor-share hovering around 28–29% through 2022 and 2023; it was only in 2024 that the sector achieved a pronounced surge, suggesting the fruition of recent investment and recovery efforts. However, this headline growth masks important management challenges. First, sustaining momentum will require more than simply adding headcount: Ilhabela must now ensure that its expanding workforce possesses the digital, green-hospitality and multilingual skills demanded by discerning visitors. Second, the pronounced jump in tourism’s labor share risks exacerbating seasonality pressure, as a disproportionate number of residents depend on tourism during narrow high-season windows. To address these issues, stakeholders should embed workforce-planning into an intelligent-destination framework—linking real-time job-market analytics with visitor-flow dashboards and training-program enrollment. By coupling targeted upskilling in sustainable practices, IoT-enabled service platforms and off-peak employment opportunities (such as community-led nature tours and digital-marketing initiatives), Ilhabela can transform its rising job numbers into a truly resilient, inclusive and environmentally responsible tourism labor market.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Ilhabela had 567 enterprises registered in the system in 2024.

The largest volume of registrations is for agencies / tour operators (137 registrations), with accommodation in second place (106 registrations), followed by event organizers (81 registrations).



OLÍMPIA – AMUSEMENT PARKS AND CULTURE

Olímpia, known as the "National Capital of Folklore" and the "Brazilian Orlando," is a major tourist destination in the interior of São Paulo, attracting millions of visitors annually. The city is notable for its water parks, such as Thermas dos Laranjais, the largest in Latin America, and Hot Beach Olímpia, as well as its rich cultural heritage and events such as the National Folklore Festival.

The city is located 430 km from the state capital, has an estimated population of 56,701 (IBGE-2022) and an area of 802,555 km².

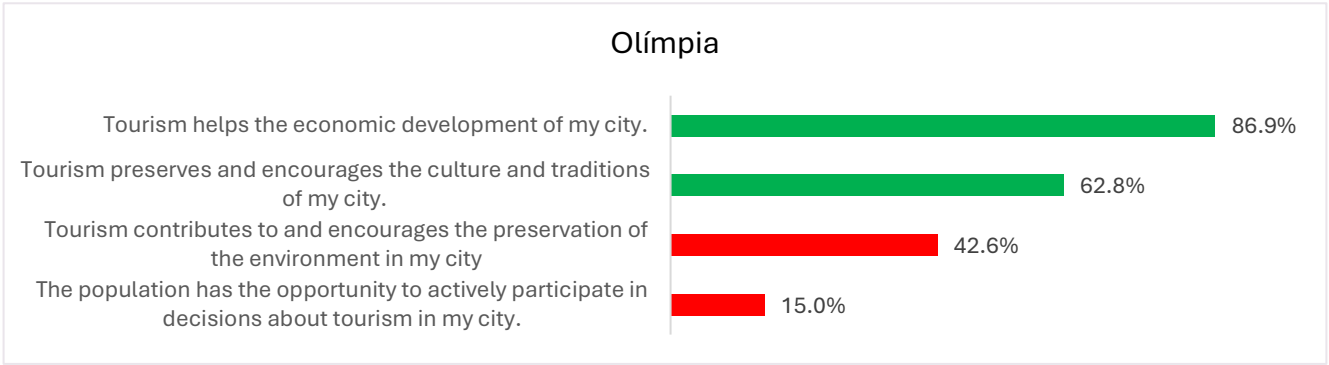
Its economy is based on a strong tourism sector, driven by water parks, as well as agribusiness and commerce.



Maria Olímpia History and Folklore Museum. Photo by Ken Chu

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Olímpia had a total of 360 answers to the survey. Together with other cities of the region, there were 381 responses to the survey in total.



Considering the proportion of residents who agreed with the statements presented in the survey, we can see that the population of Olímpia believes that tourism brings economic benefits to the city and helps preserve culture and traditions. However, the population sees environmental risks in tourism. This is possibly due to the constant growth of large resorts that accompany the creation of amusement parks in the outskirts of the city. Without the participation of the population in the actions of the local government (another point with a low rating), there is uncertainty regarding the environmental protection methods adopted in the process of the city's growth.

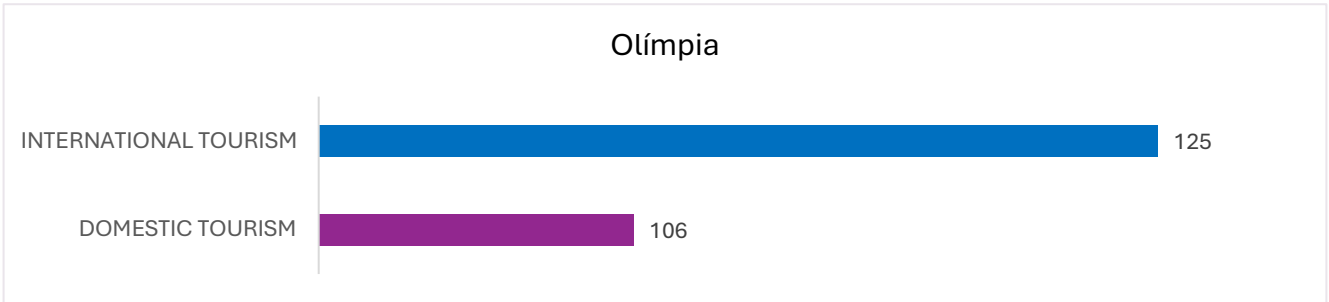
Source: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Olímpia has a positive assessment for 2024 and good expectations for 2025 both for domestic and international tourism.

The city has recently emerged as an attractive tourist destination for international travelers, with an expected increase in the number of foreign tourists. The city is investing in infrastructure, such as a future international airport, to facilitate access for visitors from various regions of Brazil and abroad.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat's Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The municipality of Olímpia has 289 declared establishments, whether they are tourist facilities or attractions. Of these, 59% have some type of accessibility.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS



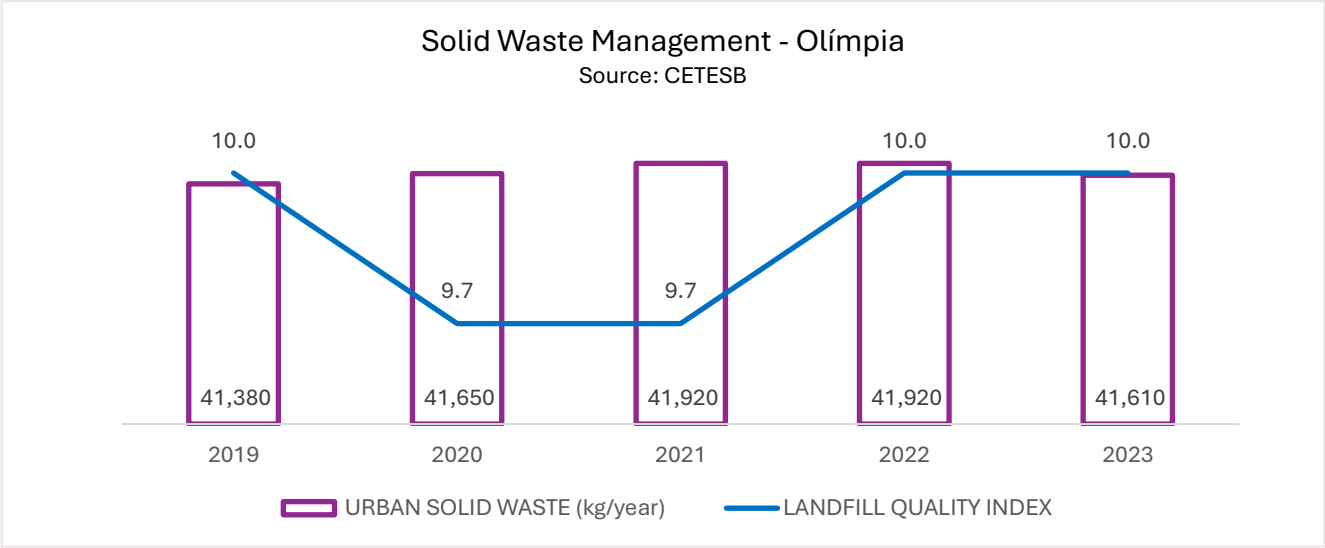
According to the Sustainable Development Index of the State of São Paulo the city of Olímpia has improved in 9 out of the 17 sustainable development goals when comparing the years 2023 and 2020. Six goals remained unchanged and there was a worsening in the status of two goals, which led to a drop in the general punctuation from 54.4% to 52%, keeping the city in an **average level of sustainable development**. Highlights to clean water and sanitation goals, affordable and clean energy goals and climate action goals which stand 80%.

Source: <https://idsc.cidadessustentaveis.org.br/profiles/3533908/>

SOLID WASTE MANAGEMENT

Between 2019 and 2023, the city of Olímpia managed to keep its annual urban solid waste generation remarkably steady at just over 41,000 kg per year, despite continued urban growth and a rising number of visitors. In 2019, the municipality recorded 41,380 kg of waste, which edged up slightly to 41,650 kg in 2020 and 41,920 kg in 2021 before settling at 41,920 kg in 2022 and then dipping marginally to 41,610 kg in 2023. This constancy in waste volume—hovering around 42,000 kg annually—reflects the positive impact of public awareness campaigns, expanded recycling initiatives, and close collaboration with local cooperatives.

At the same time, the Landfill Quality Index, scored on a 0–10 scale, illustrates a brief challenge followed by a swift rebound: it began at a perfect 10.0 in 2019, dipped to 9.7 in both 2020 and 2021, and then recovered to 10.0 in 2022 and 2023. This recovery underscores ongoing improvements in landfill management practices, waste sorting protocols, and environmental oversight. Taken together, these trends demonstrate Olímpia’s commitment to sustainable waste management, achieving both stability in waste production and excellence in disposal quality over time.

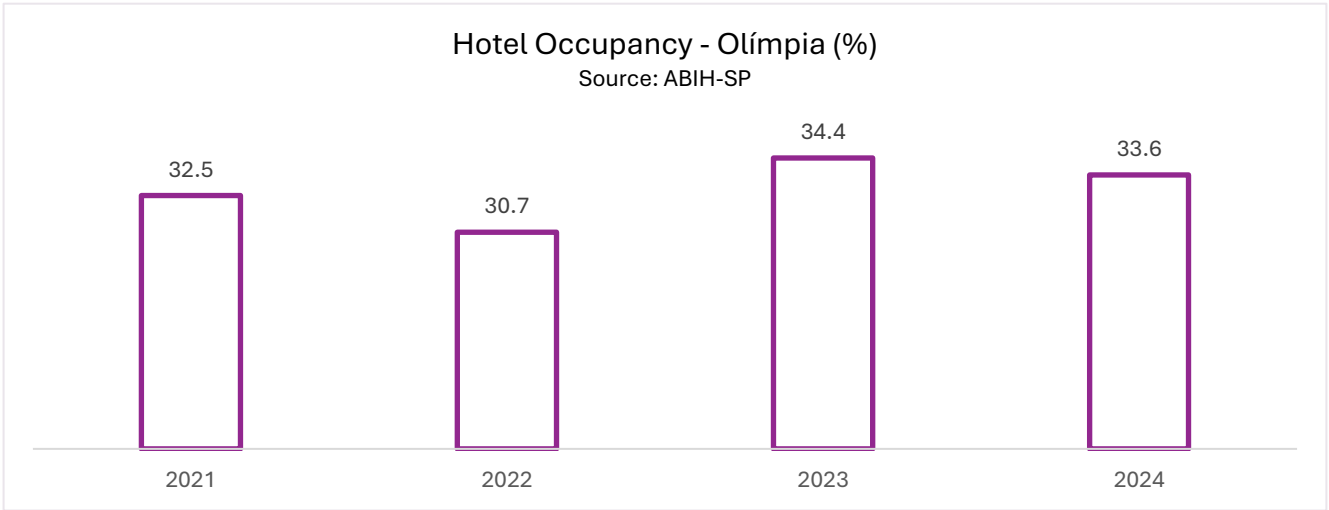


ACCOMMODATION FACILITIES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Olímpia had 5,825 rooms registered in the system in 2024, of which 1,270 were adapted for accessibility.

According to research by the Brazilian Hotel Industry Association, in relation to hotel occupancy in the region, Olímpia had an annual average of 33.6% recorded in 2024.

Olímpia’s hotel sector remains in a recovery phase but still operates well below the national average, with occupancy dipping from 32.5% in 2021 to 30.7% in 2022, rebounding to 34.4% in 2023 and settling at 33.6% in 2024. These modest figures—barely one room in three occupied on average—reflect both a reliance on peak-season traffic to diversified lodging options for off-peak visitors. To boost utilization year-round, destination managers should implement dynamic demand-shaping strategies, such as off-season package deals for wellness and cultural tours, and leverage real-time occupancy dashboards to trigger targeted promotions when room availability exceeds 40%. At the same time, incentivizing the retrofit of additional accessible and eco-friendly rooms—through fast-track permitting and green financing—will expand market reach to families, seniors and travelers with special needs, while smart-building technologies (occupancy sensors, water-recycling systems) can drive down operating costs and underpin a sustainable, resilient accommodation model for Olímpia’s next phase of growth.



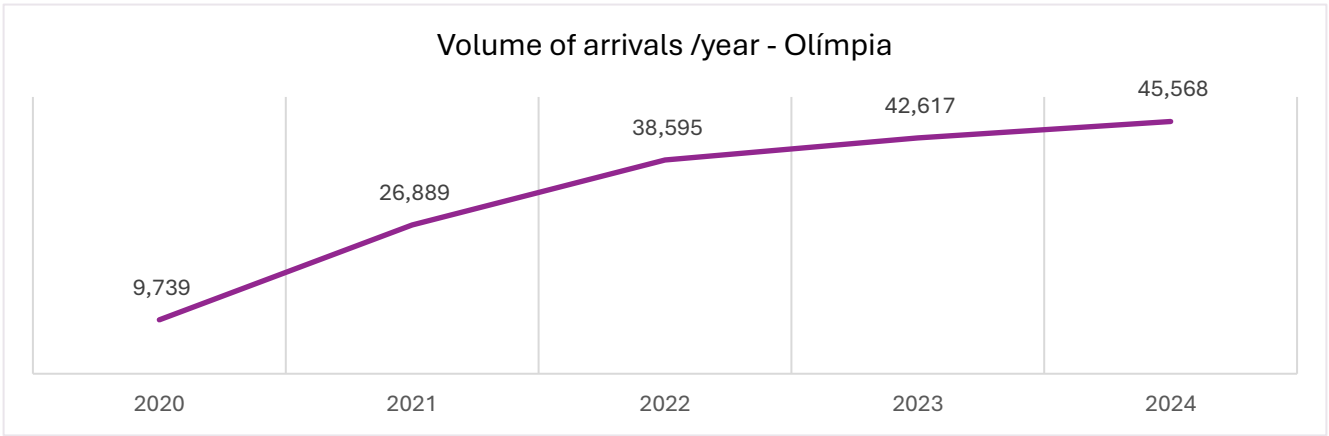
VISITOR ARRIVALS

Most arrivals to destinations in the state of São Paulo are by land. By monitoring passenger arrivals in occasional and tourist charter vehicles, it is possible to observe that the city of Olímpia has registered increasing numbers of arrivals of visitors in chartered vehicles, reaching the mark of 45,568 arrivals in the year 2024.

The peaks of visitors occur in the months of May and August, when we have the mid-season, with little rain and mild weather, which make it more favorable to visit the city's water parks. The Annual Folklore Festival also takes place in August.

Charter-bus arrivals in Olímpia have surged more than four-and-a-half-fold since 2020—rising from just 9,739 to 45,568 in 2024—with particularly steep growth in 2021–22 as travel restrictions eased. Growth has since begun to moderate (+10.4 % in 2023 and +7.0 % in 2024), suggesting that the destination is transitioning from a rapid recovery phase into a more mature, steady-state expansion. These annual totals mask pronounced seasonality peaks in May and August—driven by mild mid-season weather and events like the Folklore Festival.

To transform this momentum into sustainable, year-round performance, Olímpia should integrate real-time charter-bus arrival data with event calendars and local traffic sensors to forecast and manage peak influxes. Dynamic demand-shaping tools—such as targeted off-peak promotions and tiered pricing for water-park entry—can help smooth visitor volumes across the shoulder seasons. On the mobility front, incentivizing low-emission coach fleets, deploying fast-charging infrastructure at key terminals and embedding charter-bus services into a Mobility-as-a-Service platform will reduce carbon footprints and enhance convenience. Finally, linking these arrival analytics to utility-usage dashboards and smart resource controls (e.g., flow-metered lanes, adaptive staffing levels) will ensure that Olímpia’s infrastructure scales efficiently, balancing visitor comfort with environmental stewardship and cementing its reputation as a smart, sustainable tourism destination.



DIRECT FORMAL JOBS IN THE TOURISM SECTOR

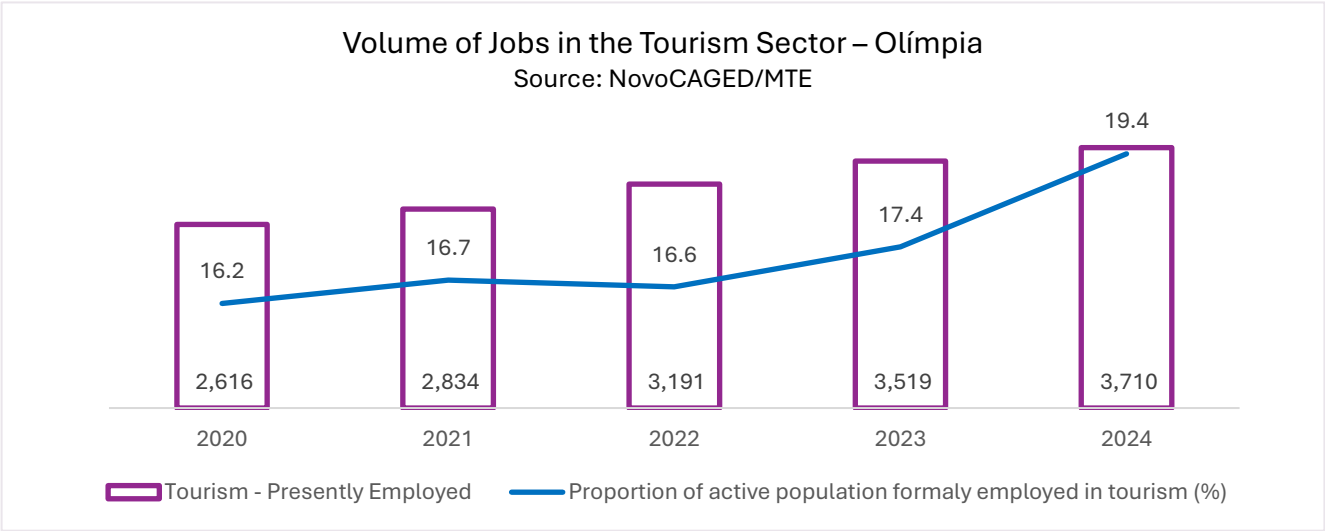
The volume of direct formal jobs in tourism-related activities has been performing well in the city of Olímpia, with 3,710 people directly employed by the end of 2024. Last year, 191 new direct formal jobs were created for tourism in the city.

The proportion of people employed in tourism represents 19.4% of the city's total direct formal workforce.

Between 2020 and 2024, Olímpia’s formal tourism workforce expanded steadily—from 2,616 direct jobs (16.2% of the local labor force) to 3,710 positions (19.4%)—with a notable acceleration in 2024 after more modest gains in prior years. This rising labor share underscores tourism’s growing economic weight but also highlights two pressing challenges: ensuring that new roles translate into high-quality, year-round employment rather than intensifying seasonal spikes, and equipping workers with the skills required for a modern, sustainable destination.

To address these needs, Olímpia should integrate real-time employment data into its destination management platform—aligning hiring trends with visitor-flow analytics to smooth staffing across off-peak and peak periods—and forge partnerships between vocational schools, hotels and adventure-tour operators to deliver micro-credential training in eco-hospitality, digital guest-experience tools and multilingual guiding.

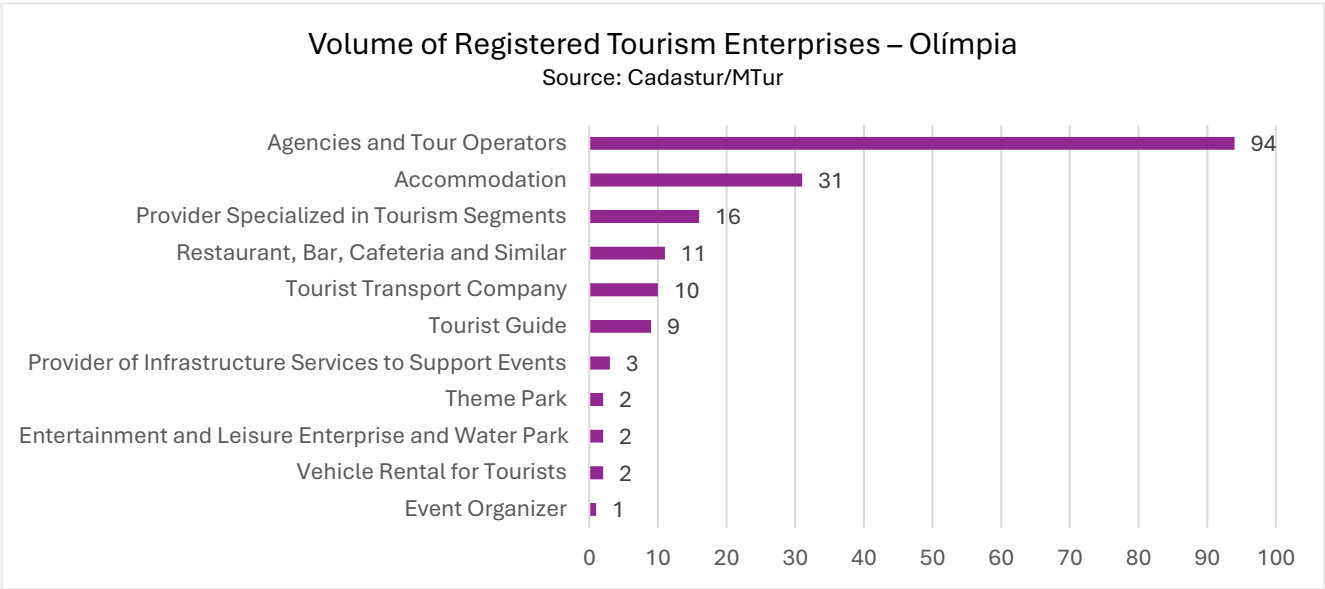
By embedding workforce planning in a smart-destination framework—linking job-market dashboards to resource-usage and arrival forecasts—Olímpia can transform headcount growth into a resilient, inclusive and environmentally responsible tourism sector.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Olímpia had 181 enterprises registered in the system in 2024.

The largest volume of registrations is for agencies / tour operators (94 registrations), with accommodation in second place (31 registrations), followed by providers specialized in tourism segments (16 registrations).



RIBEIRÃO PRETO – AGRIBUSINESS, CULTURE AND HISTORY

The city, approximately 315 km from the Capital, occupies an area of 650.916 km², of which 226.35 km² are within the urban perimeter. With 698,642 inhabitants, it is the eighth most populous city in the state, including the capital, according to the IBGE 2022 Census. Several highways connect Ribeirão Preto to several cities in São Paulo, with railways and a regional airport also available.

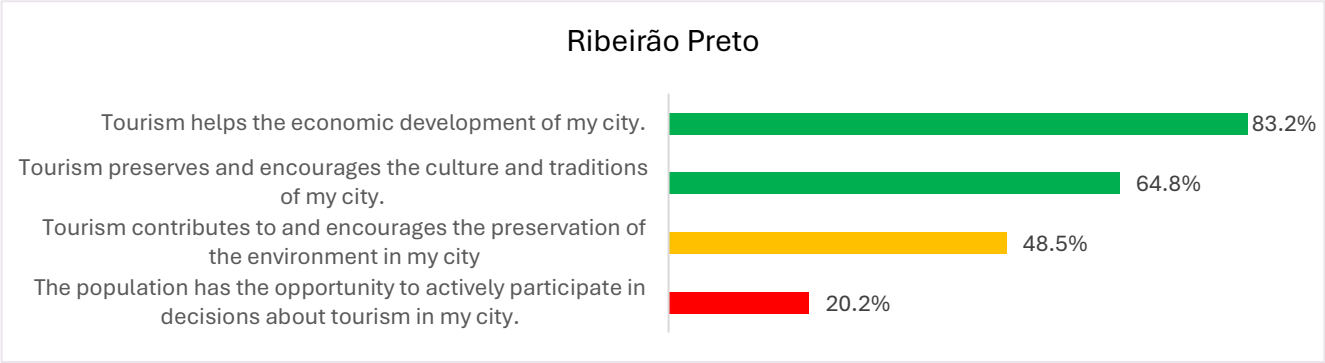
Ribeirão Preto offers several tourist options, including cultural centers, parks and leisure spaces. The city is known for its historic architecture, well-kept parks and lively nightlife, in addition to being an important hub for cultural events and festivals. The city also hosts the Agrishow, an annual five-day agribusiness fair considered the largest in Latin America, attracting around 300,000 people, including residents and visitors.



Quarteirão Paulista. Photo by unknown

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Ribeirão Preto had a total of 275 answers to the survey. Together with other cities of the region, there were 1,432 responses to the survey in total.



Considering the proportion of residents who agreed with the statements presented in the survey, we can see that the population of Ribeirão Preto believes that tourism brings economic benefits to the city and helps preserve culture and traditions. However, when it comes to preservation of the environment, the percentage of the population that considers the impact positive is a little below 50%, which is a reason for concern. The issue of governance and population participation in decision-making demands immediate attention, given that only 20.2% of the population agrees that there is civil society participation.

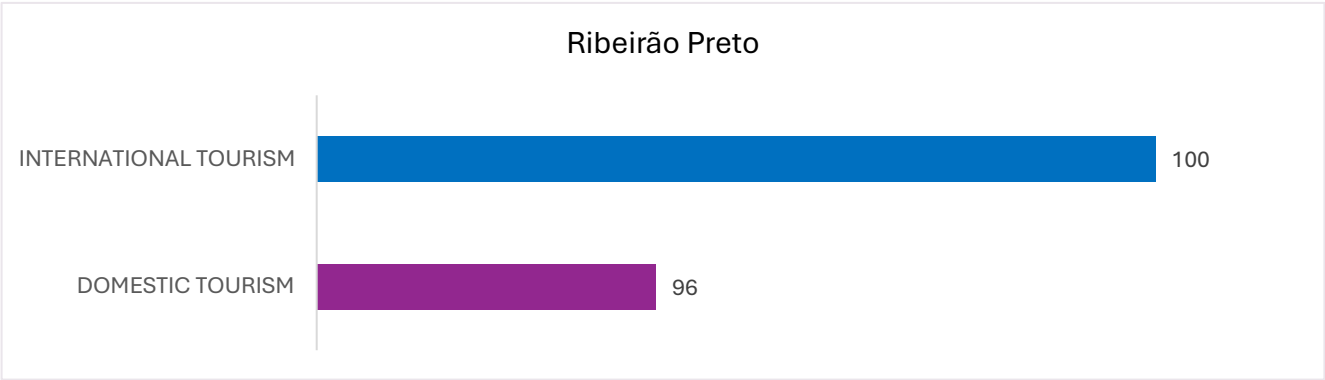
Source: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Ribeirão Preto has a positive assessment for 2024 and good expectations for 2025 when it concerns international tourism.

When it comes to past and future domestic tourism, in a general view, there is a slight pessimism on the part of the specialized market, especially in relation to the results over the course of 2024.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat's Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The municipality of Ribeirão Preto declared only 8 establishments, whether being tourist facilities or attractions. Of these, 88% have some type of accessibility.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS

2020



2023



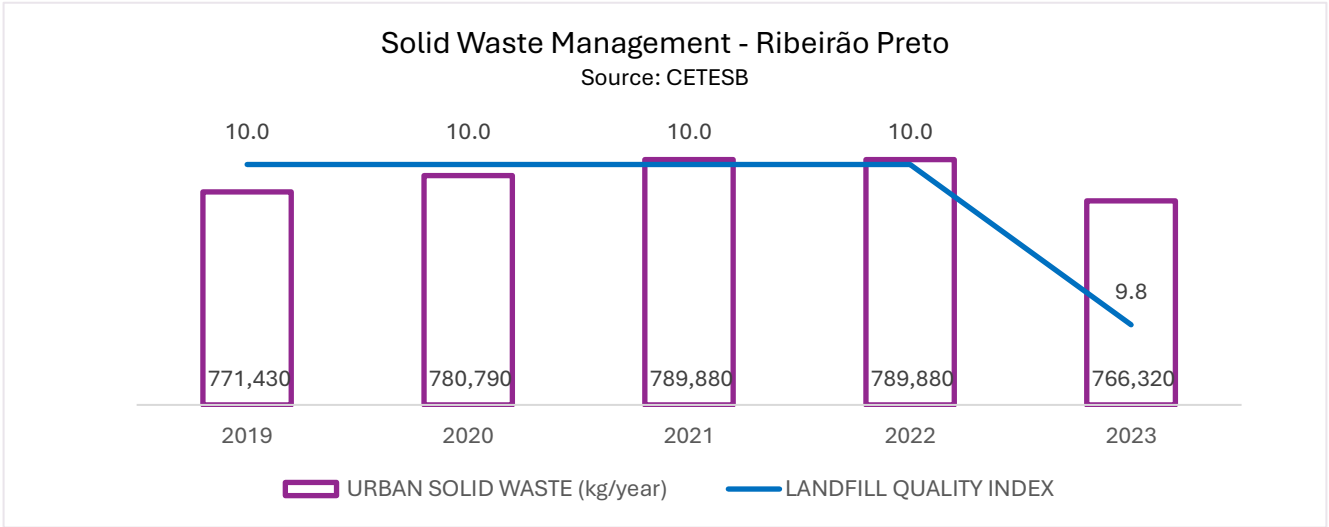
According to the Sustainable Development Index of the State of São Paulo the city of Ribeirão Preto has improved in 14 out of the 17 sustainable development goals when comparing the years 2023 and 2020. One goal remained unchanged and there was a worsening in the status of two goals, which led to a drop in the general punctuation from 60.3% to **57.8%**, keeping the city in an **average level of sustainable development**. Highlights to clean water and sanitation goals, affordable and clean energy goals, climate action goals and life below water goals which stand above 80%.

Source: <https://idsc.cidadessustentaveis.org.br/profiles/3543402/>

SOLID WASTE MANAGEMENT

Between 2019 and 2022, Ribeirão Preto consistently sent just under 790 000 kg of urban solid waste to landfills each year—rising from 771,430 kg in 2019 to 789,880 kg in both 2021 and 2022—while maintaining a perfect 10.0 Landfill Quality Index. In 2023, total waste volumes dipped by roughly 23,560 kg to 766,320 kg, signaling early successes in source-separation and recycling programs; however, the Quality Index slipped slightly to 9.8, suggesting that even as tonnage falls, operational pressures or changing waste streams may be challenging the landfill’s performance.

To cement these gains and bolster long-term sustainability, Ribeirão Preto should accelerate the transition from linear disposal to a circular-economy model. Expanding curbside composting of organic waste—either through city-run drop-off hubs or public-private partnerships—can divert significant tonnages from the landfill and produce valuable soil amendments for parks and green spaces. Simultaneously, deploying digital waste-tracking systems (using QR codes or RFID tags on commercial bins) will enhance accountability, enabling the city to pinpoint and address inefficiencies in collection and sorting. Finally, piloting small-scale waste-to-energy units for residual streams—such as anaerobic digesters or gasification modules—can recover energy on-site, reduce reliance on fossil fuels and provide a distributed power source for remote or underserved neighborhoods. By weaving together these composting, tracking and energy-recovery strategies, Ribeirão Preto can drive further waste reductions, safeguard landfill integrity and position itself as a model of sustainable resource management in a major tourism and industrial hub.



ACCOMMODATION FACILITIES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Ribeirão Preto had 4,337 rooms registered in the system in 2024, of which 363 were adapted for accessibility.

According to research by the Brazilian Hotel Industry Association, in relation to hotel occupancy in the region, Ribeirão Preto had an annual average of 50.7% recorded in 2024.

Ribeirão Preto’s accommodation sector has rebounded sharply from the pandemic trough—average hotel occupancy climbed from just 43.2% in 2021 to peaks of 57.4% in 2022 and 58.4% in 2023—before easing back to 50.7% in 2024. With 4,337 rooms on the books and only 363 (roughly 8.4%) adapted for accessibility, the city faces both a mid-market plateau in demand and a critical inclusivity gap.

The dip last year suggests that, having absorbed much of the pent-up travel rebound, Ribeirão Preto now needs to cultivate new drivers of occupancy. Deploying dynamic pricing and targeted digital campaigns—promoting off-peak corporate conferences, agritourism experiences and health-and-wellness breaks—can smooth seasonal swings and fill rooms during slower months.

Finally, integrating IoT-enabled energy and water management in hotels can lower operating costs and demonstrate sustainability credentials, ensuring Ribeirão Preto’s accommodation stock remains competitive, inclusive and resilient as visitor patterns evolve.



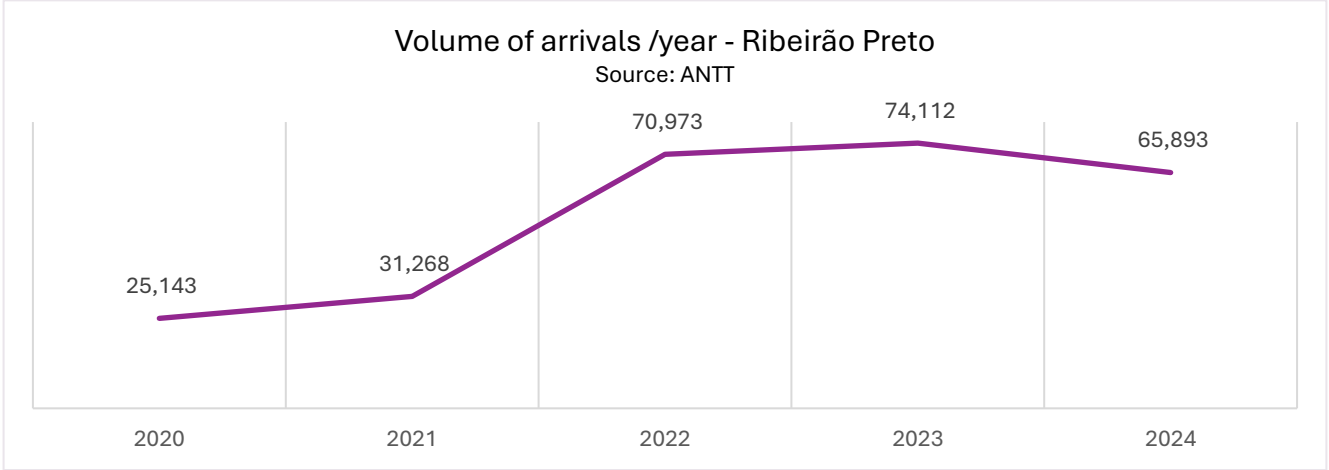
VISITOR ARRIVALS

Most arrivals to destinations in the state of São Paulo are by land. By monitoring passenger arrivals in occasional and tourist charter vehicles, it is possible to observe that the city of Ribeirão Preto has shown a good recovery after the pandemic, but a reduction of more than 8 thousand visitors arriving in chartered vehicles in 2024.

It is possible to observe that throughout the year the main peak of arrivals is in the month of June, when most of the city's cultural festivals are concentrated.

Ribeirão Preto’s charter-bus arrivals rebounded impressively from 25,143 in 2020 to a peak of 74,112 in 2023—driven largely by June’s cluster of cultural festivals—before easing back to 65,893 in 2024 (a drop of over 8,000). This pattern underscores both the city’s strong post-pandemic recovery and its dependence on a narrow high-season window.

To better balance demand, destination managers should fuse real-time arrival data with festival and event schedules, enabling dynamic off-peak incentives (such as discounted group-tour packages in spring and autumn) and staggered conference programming to spread visits more evenly through the year. Integrating coach-arrival dashboards with smart-traffic controls and low-emission vehicle incentives will smooth peak-season congestion and cut carbon emissions. By embedding these analytics into a unified, sustainable mobility framework—complete with electric shuttle linkages to rail and bike-share—Ribeirão Preto can transform episodic spikes into a more resilient, year-round tourism flow that enhances visitor experience and safeguards urban quality of life.



DIRECT FORMAL JOBS IN THE TOURISM SECTOR

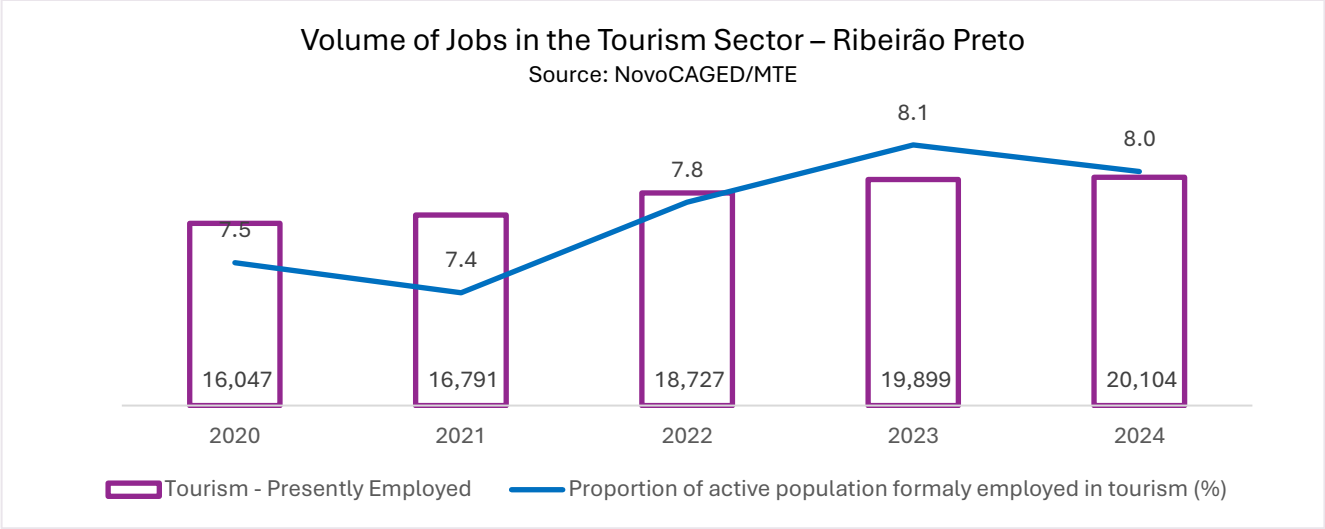
The volume of direct formal jobs in tourism-related activities has been performing relatively well in the city of Ribeirão Preto, with 20,104 people directly employed by the end of 2024. Last year, 205 new direct formal jobs were created for tourism in the city.

The proportion of people employed in tourism still represents only 8% of the city's total direct formal workforce.

Between 2020 and 2024, Ribeirão Preto’s tourism sector added roughly 4,000 direct formal positions—growing from 16,047 jobs (7.5% of the local workforce) to 20,104 jobs (8.0%)—with the labor share peaking at 8.1% in 2023 before a slight retrenchment. While this steady headcount increase reflects the city’s successful post-pandemic rebound, tourism remains a relatively small slice of the overall employment pie, underscoring untapped potential.

To translate these gains into a more resilient, high-value labor market, destination managers should integrate real-time employment metrics into their destination-management dashboards—aligning staffing levels with visitor-flow analytics to smooth seasonality—and collaborate with vocational institutions to deliver micro-credentials in sustainable hospitality, digital-guest-experience platforms and multilingual guiding.

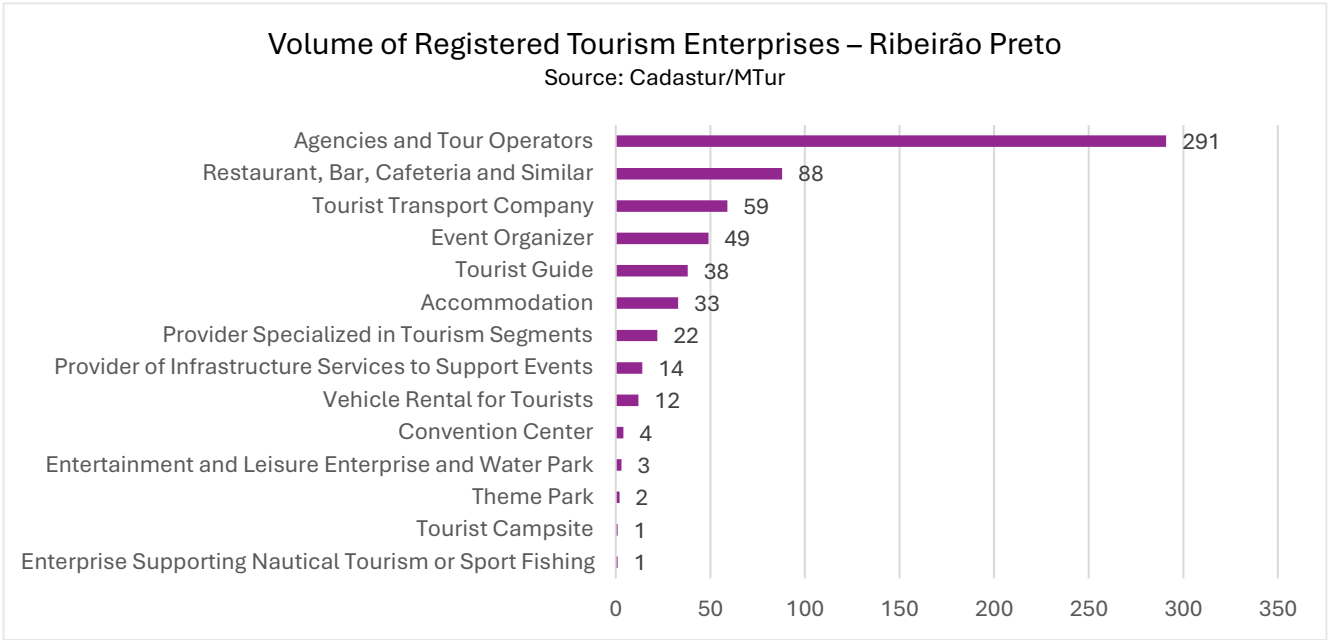
Incentivizing year-round training programs and off-season internships in emerging niches like agritourism and wellness retreats will bolster workforce quality, increase retention and ensure that Ribeirão Preto’s tourism jobs become a durable engine of inclusive economic growth.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Ribeirão Preto had 617 enterprises registered in the system in 2024.

The largest volume of registrations is for agencies / tour operators (291 registrations), with food services in second place (88 registrations), followed by tourist transport companies (59 registrations).



SANTOS – PORT, BEACH AND CULTURE

Santos is a tourist city on the coast of São Paulo, known for its port, beaches, and cultural attractions. The city has stood out in the Brazilian tourism scene, with record visitor numbers and economic growth. Besides tourism, Santos' main economic activities are the port, commerce, and fishing.

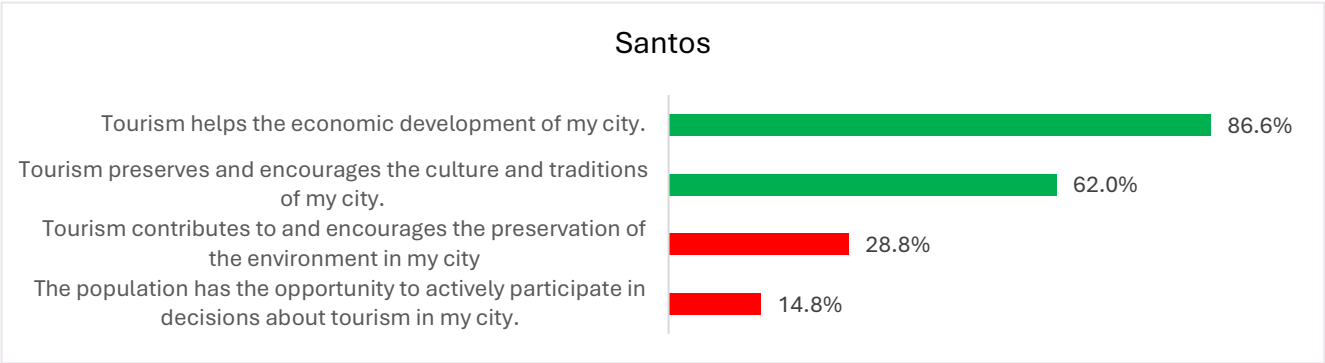
Its population is approximately 418,608 (IBGE - 2022) in an area of 280,674 km². Its seaport is the largest in Latin America, crucial to the city and state's economy.



Tourist Tram. Photo by Ken Chu

LOCAL SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Santos had a total of 441 answers to the survey. Together with other cities of the region, there were 1,408 responses to the survey in total.



Considering the proportion of residents who agreed with the statements presented in the survey, we can see that the population of Santos believes that tourism brings economic benefits to the city and helps preserve culture and traditions. However, when it comes to preservation of the environment, the percentage of the population that considers the impact positive is only 28.8%, which is a major reason of concern. The issue of governance and population participation in decision-making demands immediate attention, given that only 14.8% of the population agrees that there is civil society participation.

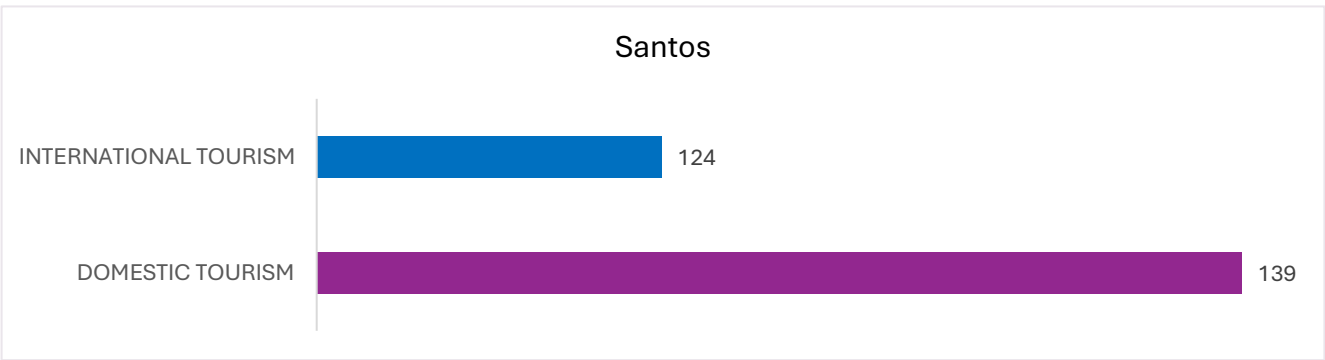
Source: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2024-2025>

MARKET SATISFACTION WITH TOURISM – PERCEPTION SURVEY

Considering that the market assessment for domestic and international tourism, both in terms of actual results and future expectations, is positive in the case of an average score above 100 points, we note that the specialized market in the city of Santos has a positive assessment for 2024 and good expectations for 2025 when it concerns domestic international tourism.

Since Santos is a city very close to the state capital (less than 1 hour by car) and has easy access to several nearby cities, it is natural that domestic tourism in Santos is more representative. International tourism in the city is stronger during the cruise season when the city receives around one million foreign visitors.

Source: CITE/SETUR-SP



ACCESSIBILITY

In order for CITE to know the level of accessibility in the monitored cities, we use the data declared by the cities on the São Paulo State Travel and Tourism Secretariat's Tourism Ranking Platform. The information is the responsibility of the cities, which must update their tourism inventories every two years.

The municipality of Santos declared only 35 establishments, whether being tourist facilities or attractions. Of these, 94% have some type of accessibility.

Source: SETUR-SP

SUSTAINABLE DEVELOPMENT GOALS



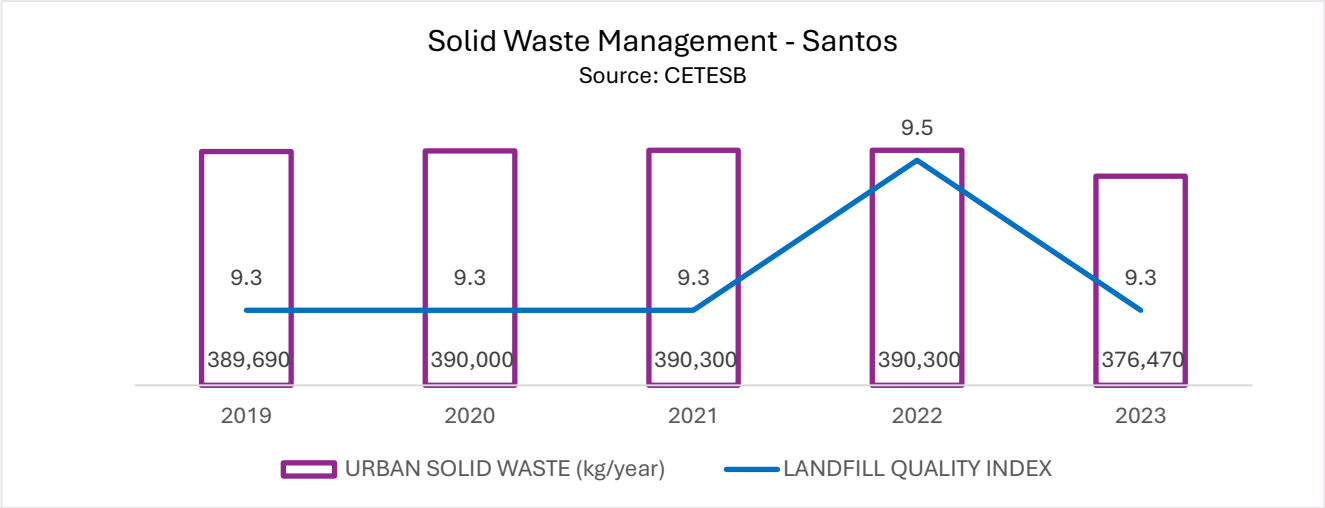
According to the Sustainable Development Index of the State of São Paulo the city of Santos has improved in 11 out of the 17 sustainable development goals when comparing the years 2023 and 2020. Five goals remained unchanged and there was a worsening in the status of one goal, which led to a drop in the general punctuation from 63.1% to **57.4%**, keeping the city in an **average level of sustainable development**. Highlights to clean water and sanitation goals, affordable and clean energy goals, climate action goals and life below water goals which stand above 80%.

Source: <https://idsc.cidadessustentaveis.org.br/profiles/3548500/>

SOLID WASTE MANAGEMENT

Between 2019 and 2022, Santos sent almost exactly 390,000 kg of urban solid waste to landfills each year, with the Landfill Quality Index holding steady at 9.3 before briefly peaking at 9.5 in 2022. In 2023, total waste volumes fell by roughly 14,000 kg to 376,470 kg—a sign that recycling campaigns and source-separation efforts are beginning to bite—but the Quality Index slipped back to 9.3, suggesting that the reduced tonnage may be masking operational stresses or shifts in waste composition.

To sustain both lower volumes and high landfill performance, Santos should deepen its embrace of circular-economy practices: expand curbside source separation of organics and recyclables, deploy decentralized composting hubs to divert bio-waste, and pilot waste-to-energy micro-grids for residual streams. Layering in digital tracking—using QR codes or RFID on commercial bins—would enhance transparency and accountability, ensuring that landfill operators maintain best practices even as total inflows decline. By knitting these measures together, Santos can drive further waste reduction, safeguard its landfill’s long-term integrity and fortify the environmental foundation of its tourism economy.



ACCOMMODATION FACILITIES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Santos had 2,216 rooms registered in the system in 2024, of which 122 were adapted for accessibility.

According to research by the Brazilian Hotel Industry Association, in relation to hotel occupancy in the region, Santos had an annual average of 57.8% recorded in 2024.

Santos’s lodging market has rebounded strongly since the height of the pandemic, climbing from an average occupancy of just 37.2% in 2021 to 55.6% in 2022 and peaking at 58.4% in 2023 before settling at 57.8% in 2024. This recovery reflects the city’s broad appeal—beach tourism, cruise connections and growing MICE activity—but the plateau in recent years suggests that further gains will depend on strategic interventions. With 2,216 rooms registered in Cadastur in 2024 and only 122 of those (5.5%) adapted for accessibility, Santos faces both a mid-market stabilization and an urgent inclusivity gap.

To push occupancy beyond current levels and tap under-served segments, stakeholders should deploy dynamic, data-driven pricing during shoulder seasons, develop targeted digital campaigns for families and travelers with reduced mobility, and tie permitting incentives to universal-design renovations. Embedding smart-building technologies—such as IoT-enabled occupancy sensors, demand-controlled HVAC and responsive lighting—can also lower operating costs and bolster sustainability credentials. By combining these demand-shaping measures with accelerated accessibility upgrades, Santos can transform its solid recovery into sustained, inclusive growth across all market segments.



VISITOR ARRIVALS

Most arrivals to destinations in the state of São Paulo are by land. By monitoring passenger arrivals in occasional and tourist charter vehicles, it is possible to observe that the city of Santos has maintained a constant volume of visitor arrivals over the last two years.

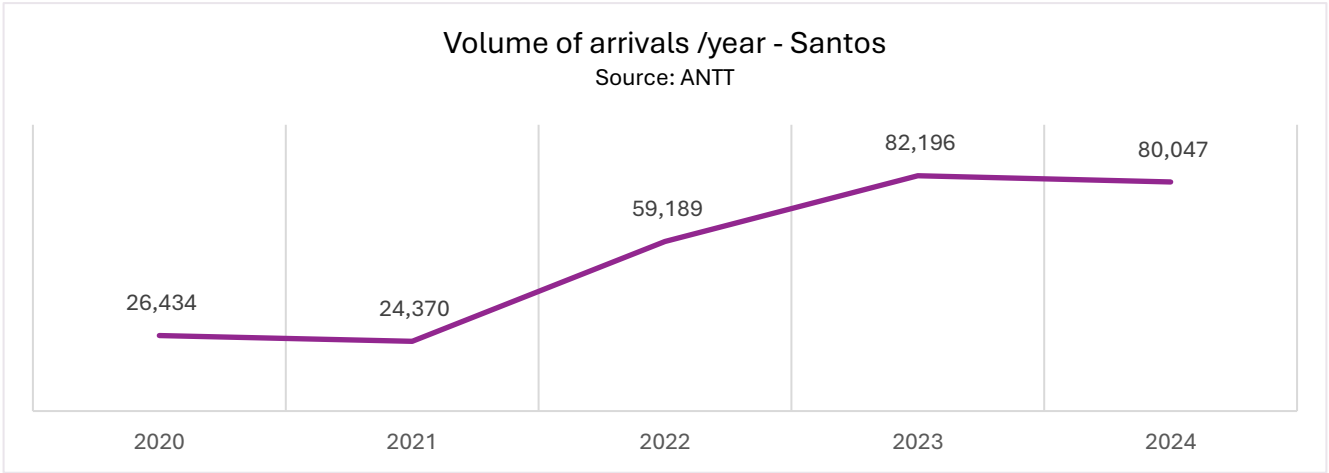
The period from January to March - summer in the southern hemisphere - is when the largest volume of arrivals in the city is concentrated. Santos is also very popular for the New Year's Eve party that takes place on the city's beaches.

After rebounding sharply from 24,370 charter-bus arrivals in 2021 to 82,196 in 2023, Santos's annual coach passenger volumes have plateaued around 80,000—registering 80,047 arrivals in 2024. This stabilization masks pronounced seasonality: fully one-quarter of annual arrivals occur between January and March, driven by summer beach tourism and New Year's Eve celebrations along the waterfront.

From a smart-destination standpoint, Santos must evolve from reactive accommodations of these influxes to proactive demand management. By integrating real-time coach-arrival feeds with weather forecasts and event calendars in a unified dashboard, destination managers can forecast peak windows and deploy targeted off-peak incentives—such as discounted group-tours to the historic port or bundled cultural-festival packages in autumn—to smooth demand across the year.

On the mobility side, incentivizing low-emission coach fleets through preferential terminal access and charging-infrastructure subsidies will cut carbon emissions during high-traffic months. Additionally, embedding coach services into a Mobility-as-a-Service platform—allowing visitors to plan end-to-end journeys from bus terminal to beach, bike-share or metro in a single app—will reduce private-vehicle congestion and enhance visitor satisfaction.

Finally, linking arrival data to resource-usage systems (energy, water, waste) and dynamic staffing tools will ensure that municipal services scale responsively with visitor numbers, preserving both operational efficiency and Santos's environmental assets. By marrying granular arrival analytics, green-fleet incentives and seamless multimodal integration, Santos can turn its current plateau into a foundation for resilient, year-round tourism growth.



DIRECT FORMAL JOBS IN THE TOURISM SECTOR

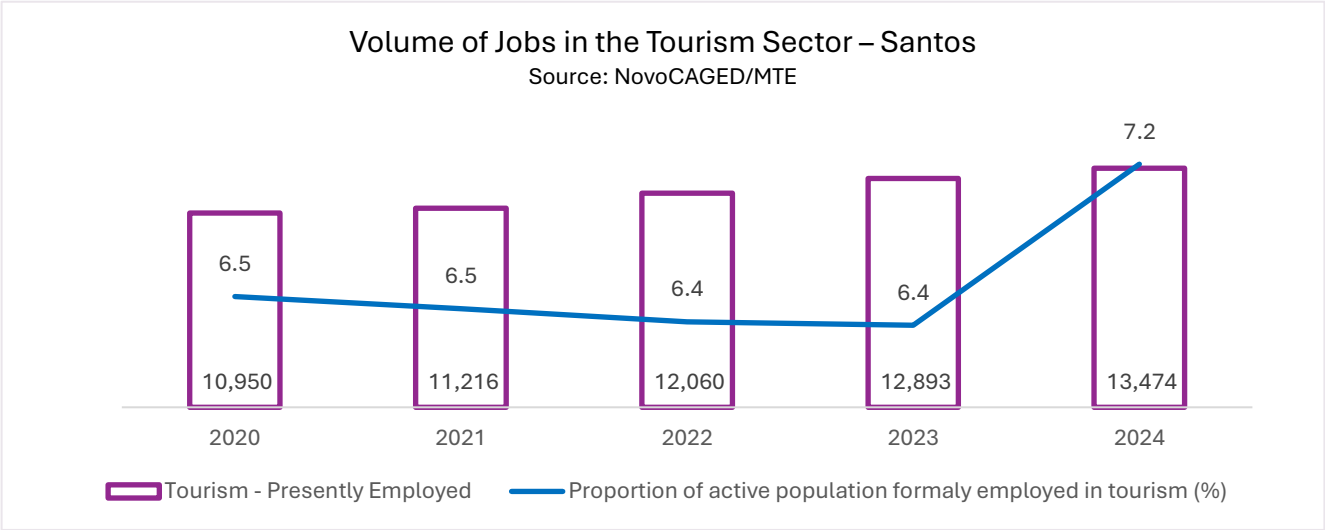
The volume of direct formal jobs in tourism-related activities has been performing relatively well in the city of Santos, with 13,474 people directly employed by the end of 2024. Last year, 581 new direct formal jobs were created for tourism in the city.

The proportion of people employed in tourism still represents only 7.2% of the city's total direct formal workforce.

Between 2020 and 2024, Santos’s tourism sector added over 2,500 direct formal jobs—rising from 10,950 to 13,474 positions—while its share of the city’s employed population climbed from 6.5% to 7.2%. After relatively modest increases and a stable labor share through 2022–23, 2024 saw a notable uptick in tourism’s workforce weight, reflecting renewed hiring in hospitality, events and support services. Yet with tourism still accounting for less than one in ten jobs, the sector remains under-leveraged as an engine of inclusive growth.

To transform headcount growth into lasting value, destination managers should embed workforce analytics into a smart-destination platform—aligning real-time employment figures with visitor arrivals, seasonal peaks and utility-usage dashboards. Partnering with local training institutions to roll out micro-credentials in sustainable hospitality, digital guest-experience tools and multilingual guiding will sharpen workforce skills and boost retention. Moreover, linking recruitment cycles to off-peak event programming—such as corporate retreats and cultural festivals—can smooth staffing levels year-round and reduce the disruptive hiring spikes of high season.

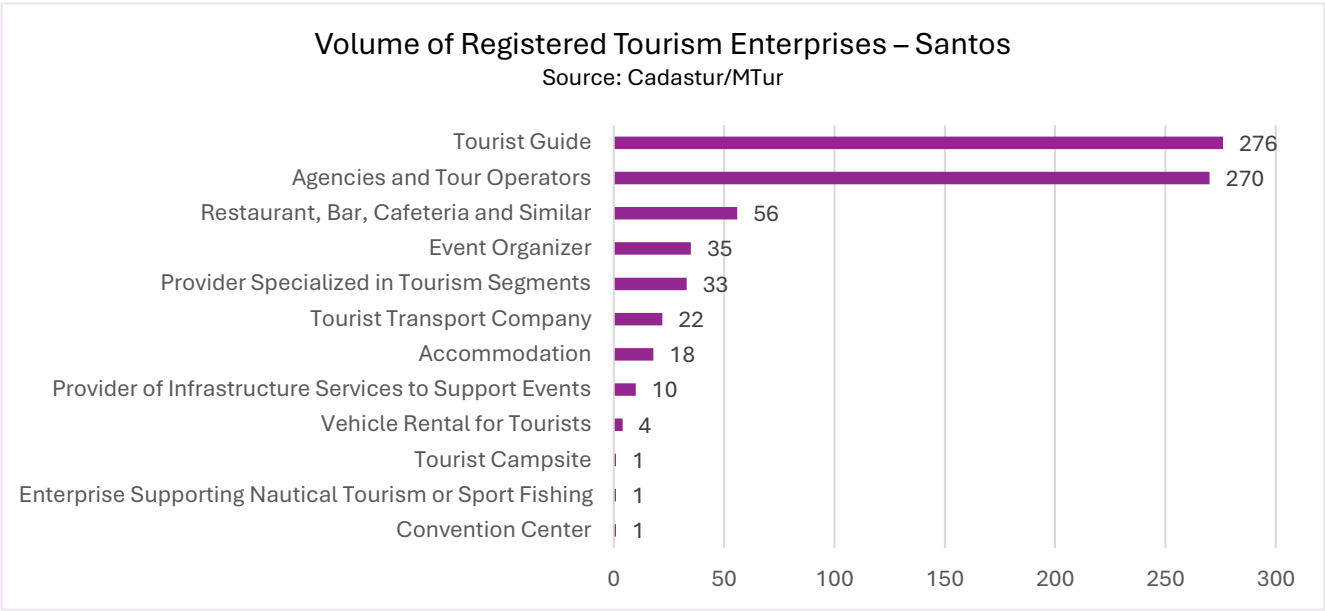
Finally, incentivizing eco-certification training and green-operations credentials will not only prepare workers for evolving sustainability standards but also elevate Santos’s reputation as a forward-thinking, resilient tourism hub.



TOURISM ENTERPRISES

According to the National Registration System for Individuals and Legal Entities in the Tourism Sector of the Ministry of Tourism, the city of Santos had 727 enterprises registered in the system in 2024.

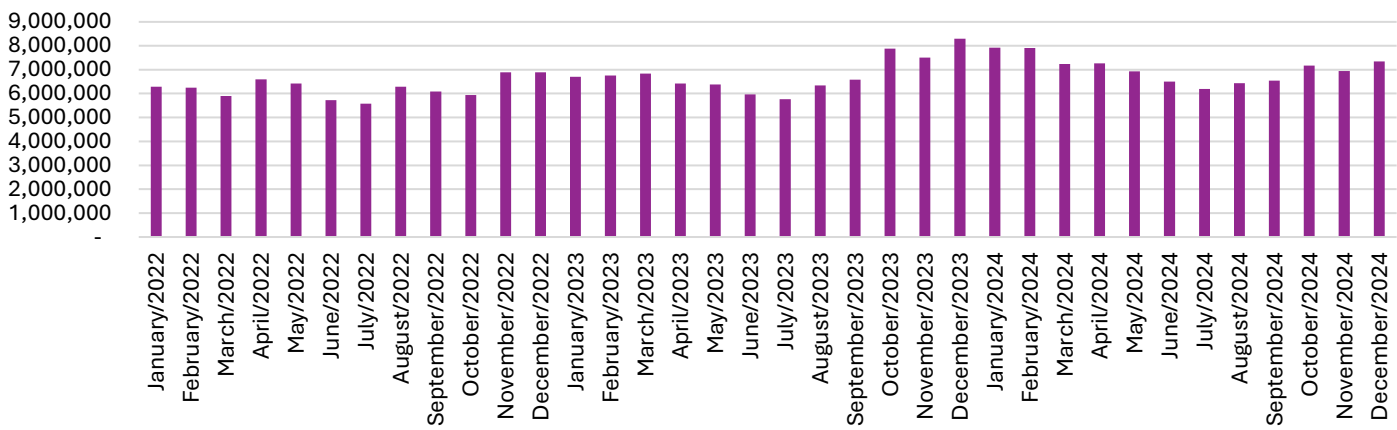
The largest volume of registrations is for tourist guides (276 registrations), with agencies / tour operator in second place (270 registrations), followed by food services (56 registrations).



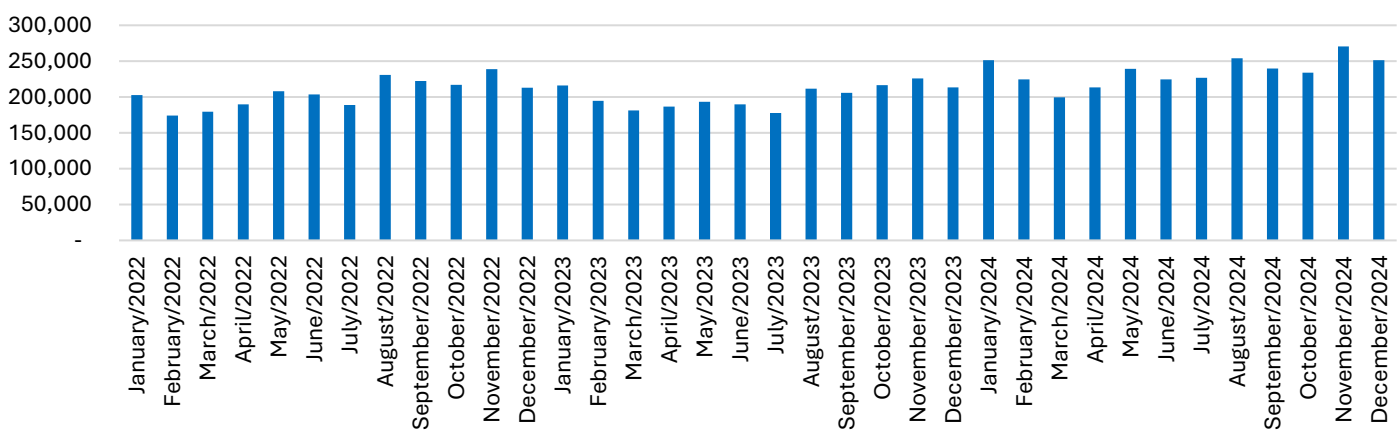
WATER AND ENERGY CONSUMPTION AND VISITOR FLOW

APARECIDA

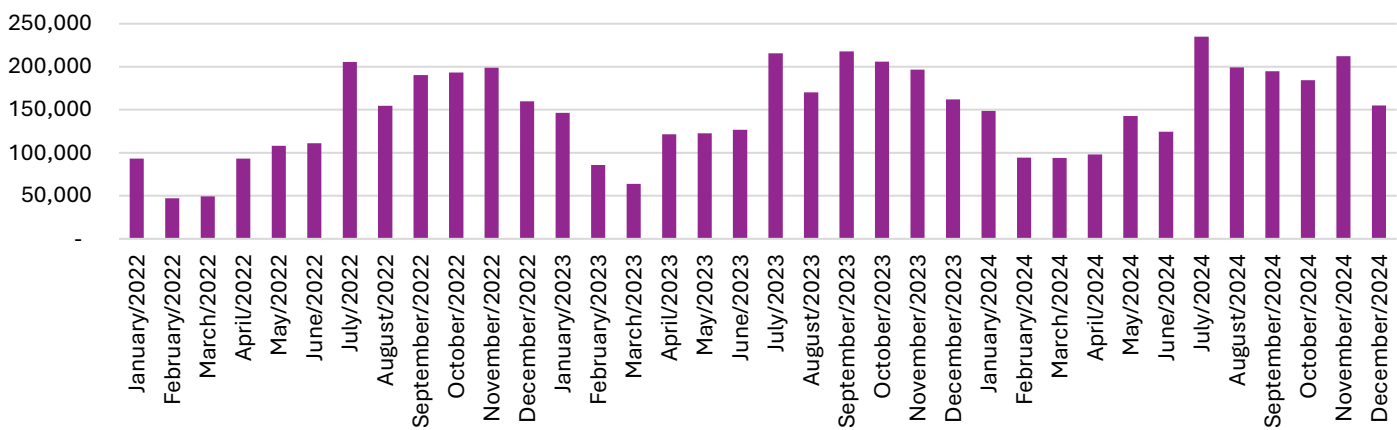
ENERGY CONSUMPTION IN APARECIDA (KWH)



WATER CONSUMPTION IN APARECIDA (M³)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT APARECIDA





In general, the monthly average consumption of electricity in Aparecida is between 5 and 7 million kWh, with moderate seasonal variations. Water consumption, on the other hand, ranges between 200 and 280 thousand m³/month, with clear peaks in the months of September, October and December of each year.

There is a slight correlation between the increase in water consumption and the high religious tourist season, notably in September and October (National Pilgrimage) and December (Christmas and religious events) and to a lesser extent in July (school holidays).

Water consumption is more sensitive to the flow of tourists than energy consumption, which may be associated with direct use in accommodations, public restrooms and restaurants.

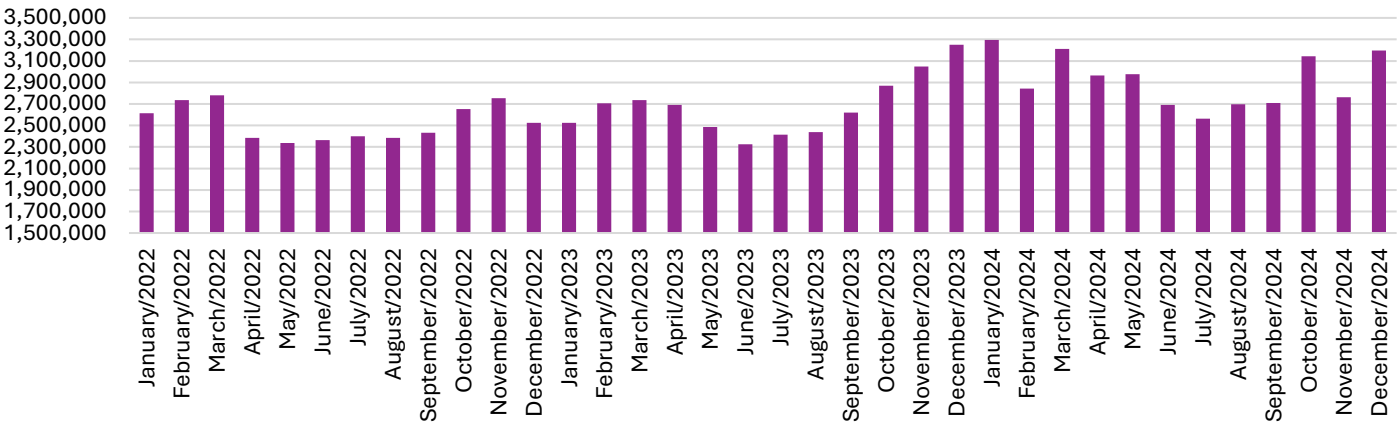
The data show significant fluctuations in the number of tourist buses, with peaks of over 200 thousand people per month. The highest volumes of arrivals are concentrated between the months of April and October, with peaks in May, August, September and December.

Thus, periods of sharp decline are noted in the months of January, February and June, possibly reflecting low season or the absence of major events.

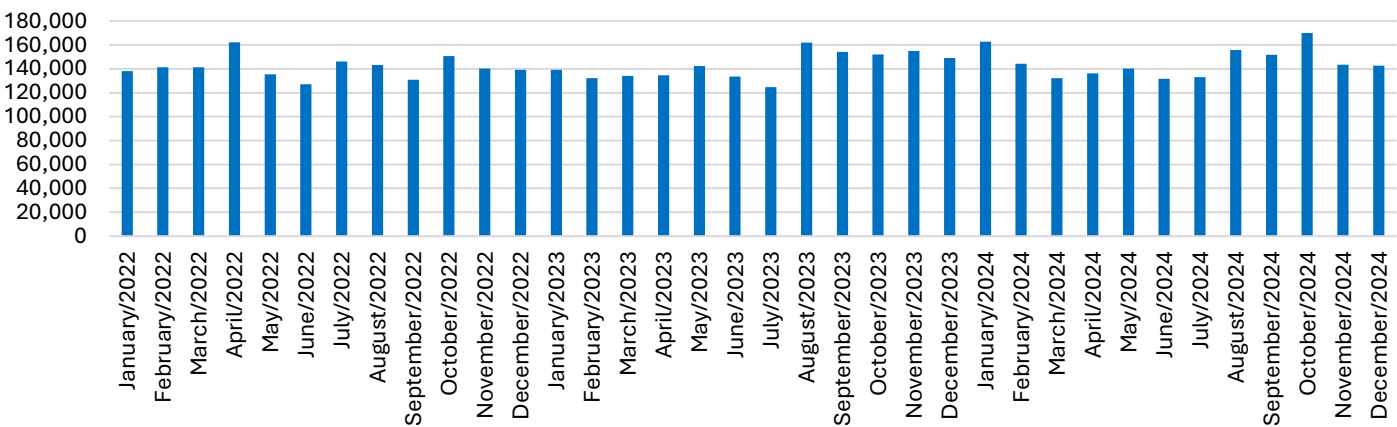
In several months of high tourist visitation, the increase in water demand is visible, signaling direct pressure from tourist activity on urban services. For example, in September and December 2022, August and December 2023, September and December 2024.

Although energy consumption also increases in some of these periods, it is more stable and less sensitive to occasional flow, possibly due to a structural consumption base (residents, public lighting and permanent religious buildings). This difference suggests that public policies aimed at water efficiency during peak periods should be points of attention for the city of Aparecida.

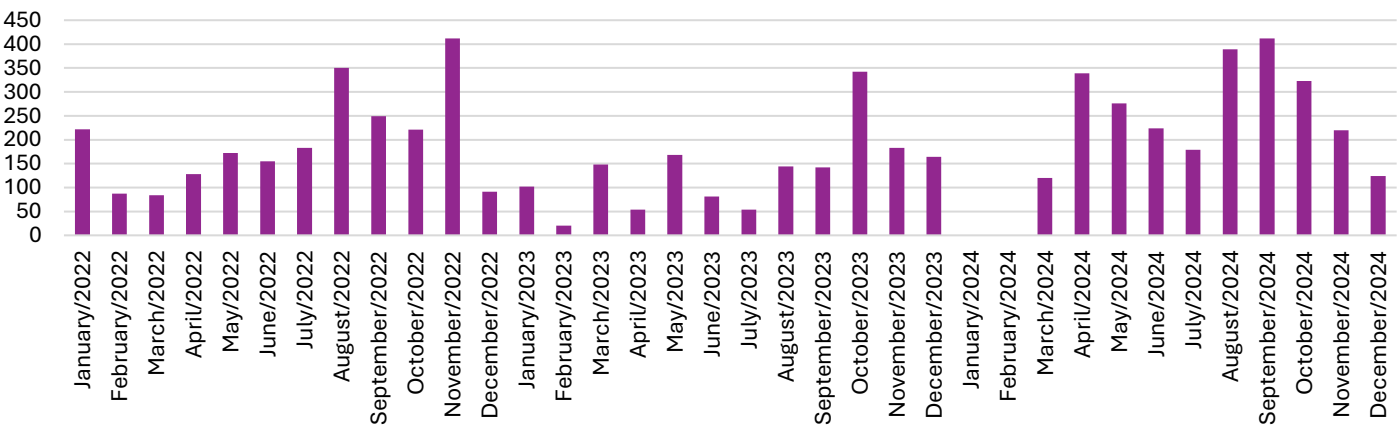
ENERGY CONSUMPTION IN BROTAS (KWH)



WATER CONSUMPTION IN BROTAS (M³)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT BROTAS





The analysis of data from Brotas from 2022 to 2024 reveals distinct patterns between resource consumption (water and energy) and the arrival of tourist charter vehicles, allowing for some relevant interpretations for municipal management and local observatories.

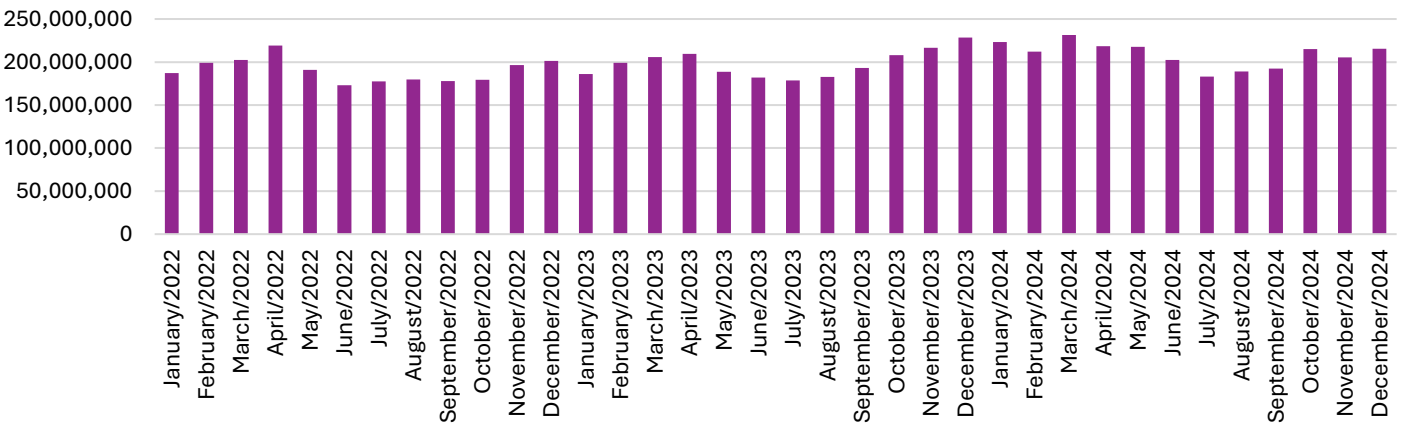
The consumption of electricity in the municipality has been relatively stable over the three years analyzed, generally fluctuating between 2 and 3 million kWh per month. In some periods, such as the beginning and end of 2023 and again at the end of 2024, there is a slight increase in consumption, but without major structural variations. Water consumption, on the other hand, fluctuates between 120 and 180 thousand m³ per month, with some notable peaks, especially in months such as March, September and December 2022 and again in September 2024. In general, both energy and water maintain moderate seasonal behavior, which may reflect a consumption base associated with residents and permanent activities at the destination, although occasionally impacted by tourist seasonality. When observing the arrival of tourist charter buses, the dynamics are quite different. The volume of visitors fluctuates sharply, with several months registering less than 100, especially in the first half of 2023, and specific peaks that stand out in the second half of 2022, early 2023, and especially in mid and late 2024 — when the volume exceeds 500 visitors in certain months. These peaks coincide, in part, with long holidays, school vacations and possibly with the holding of sporting and nature events, considering Brotas' profile as an ecotourism and adventure destination.

Although the pattern of tourist charters does not show an immediate correlation with peaks in water or energy consumption, it is possible to assume that the impact of tourist visits in Brotas is more associated with short-term or regional-based tourism, which may use its own means of transport or not be fully captured in the charter data. Another possibility is that the one-off increase in tourists is not high enough to significantly change the municipal average resource consumption pattern, especially in a municipality where tourism supply is more spread across rural properties and attractions, with a more balanced use of infrastructure.

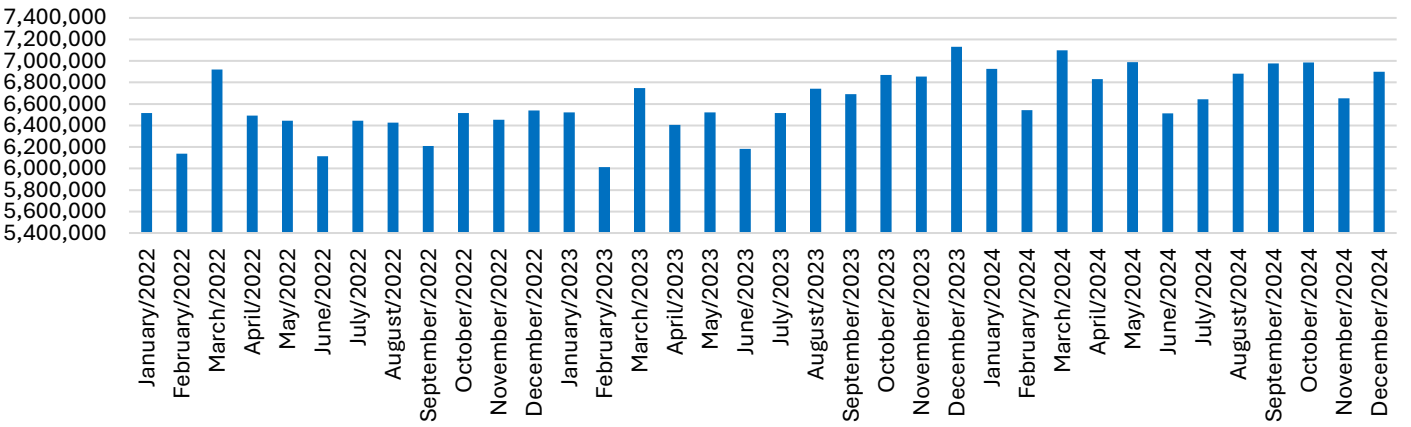
Despite this, the coincidence between the increase in bus arrivals and the peaks in water consumption in September and December of 2022 and 2024 suggests that there may indeed be a greater demand on the water supply system during periods of high tourist demand. This data is relevant, above all, for public policies to monitor the municipality's water carrying capacity, considering the use of rivers, waterfalls and water activities as a central part of the tourist experience in Brotas.

CAMPINAS

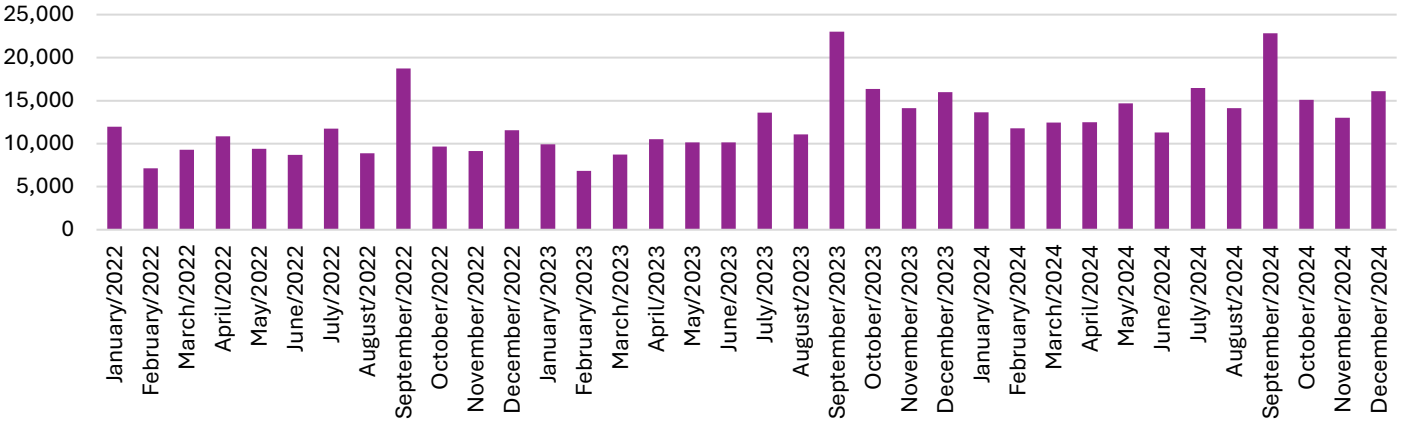
ENERGY CONSUMPTION IN CAMPINAS (KWH)



WATER CONSUMPTION IN CAMPINAS (M³)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT CAMPINAS





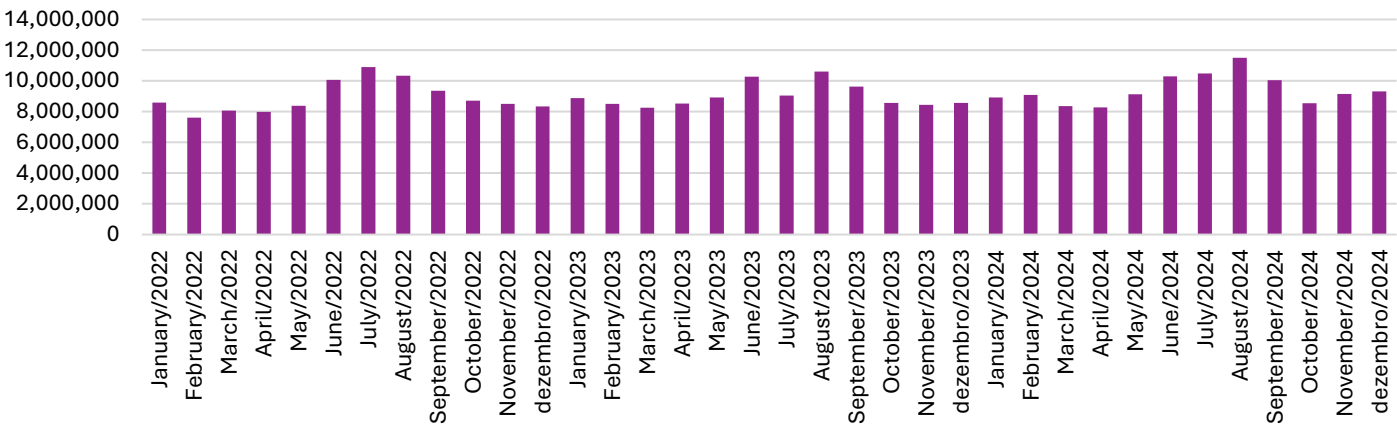
The analysis of data for the municipality of Campinas between 2022 and 2024 shows the behavior of a large urban center with a mixed tourism profile, combining business tourism, events and family visits, in addition to being a regional service hub. Between January 2022 and November 2024, Campinas presented seasonal patterns in electricity and water consumption, although at milder amplitudes than in smaller tourist destinations. Energy demand fluctuates between approximately 18,000,000 kWh in the milder months (June–August) and peaks reaching 25,000,000 kWh in January and February, when intense heat increases the use of air conditioning and commercial and industrial refrigeration. The water supply varies from approximately 6,400,000 m³ in fall/winter to 7,500,000 m³ in summer, reflecting both residential use and irrigation of public and private green areas.

In relation to tourism, measured here by the arrival of visitors on chartered buses, peaks are observed in characteristic periods — Carnival (February), July holidays and the high season at the end of the year — with up to 28,000 visitors in a single month, compared to levels of 8,000 to 10,000 tourists in low season months. However, the visual correlation between these peaks in visitors and utility consumption is weak: the energy and water spikes occur almost independently, since the Campinas network is subordinated mainly to industrial and commercial use and to the profile of a large regional metropolis, so that tourism has a marginal impact on total demand.

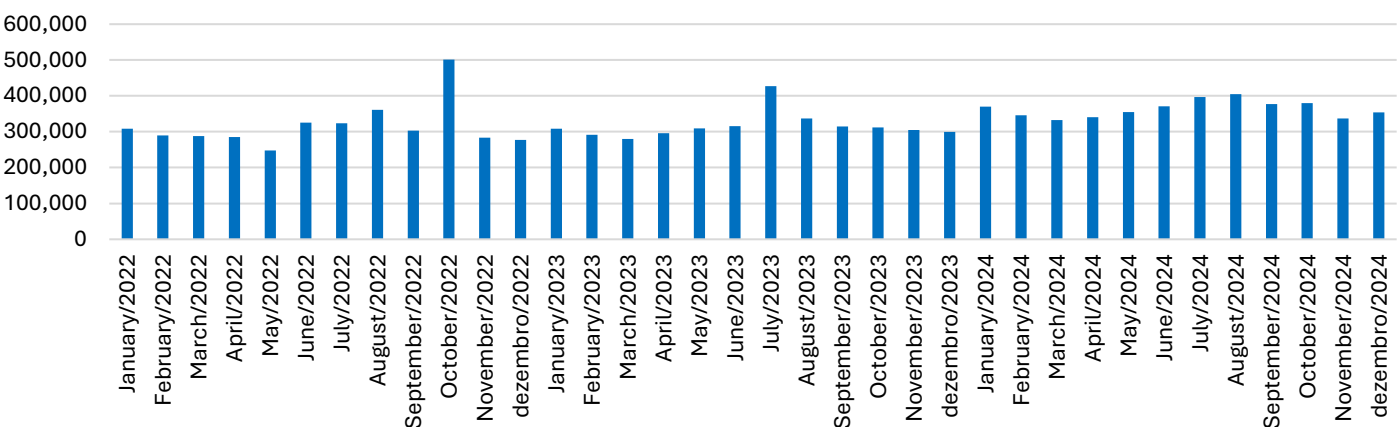
In summary, Campinas demonstrates a consolidated urban structure, with predominantly stable resource consumption, and a tourism profile less dependent on large volumes of group visitors. Local tourism management can evolve with the use of integrated data to better understand the effect of corporate and regional tourism on the services, transportation and hospitality sectors, to improve data governance, above all.

CAMPOS DO JORDÃO

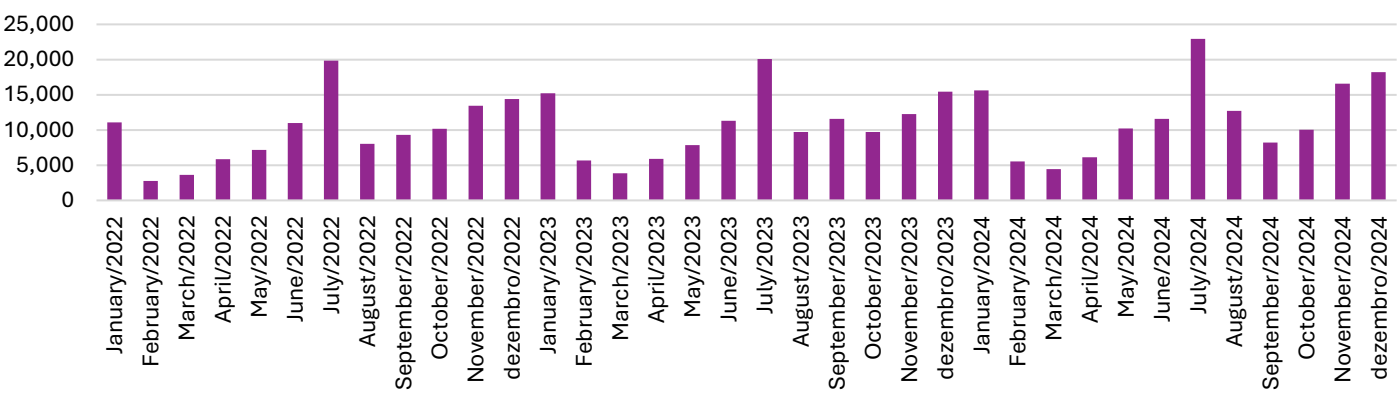
ENERGY CONSUMPTION IN CAMPOS DO JORDÃO (KWH)



WATER CONSUMPTION IN CAMPOS DO JORDÃO (M³)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT CAMPOS DO JORDÃO





The analysis of monthly data on electricity consumption (kWh), water supply (m³) and occasional charter bus arrivals in Campos do Jordão, from January 2022 to November 2024, reveals some clear patterns of seasonality, growth trends and points of attention that deserve consideration for infrastructure planning and resource management policies.

In terms of seasonality, both energy and water show recurring peaks in the high winter season, especially in July, when lower temperatures and intense tourist movement increase the use of heating, lighting and other services associated with hospitality. The energy graph shows that average values jump from around 8–9 million kWh in the low season months (March/April) to more than 10–12 million kWh in July/September. Water consumption follows a similar pattern, reaching maximums close to 500–550 thousand m³ in the same period. The visual correlation between the flow of tourists (arrivals by charter) and these consumption peaks is clear: in the months when arrivals exceed 20,000 vehicles (July each year), the highest levels of demand for energy and water are recorded, while in periods of lower influx (March, April and October) consumption declines consistently.

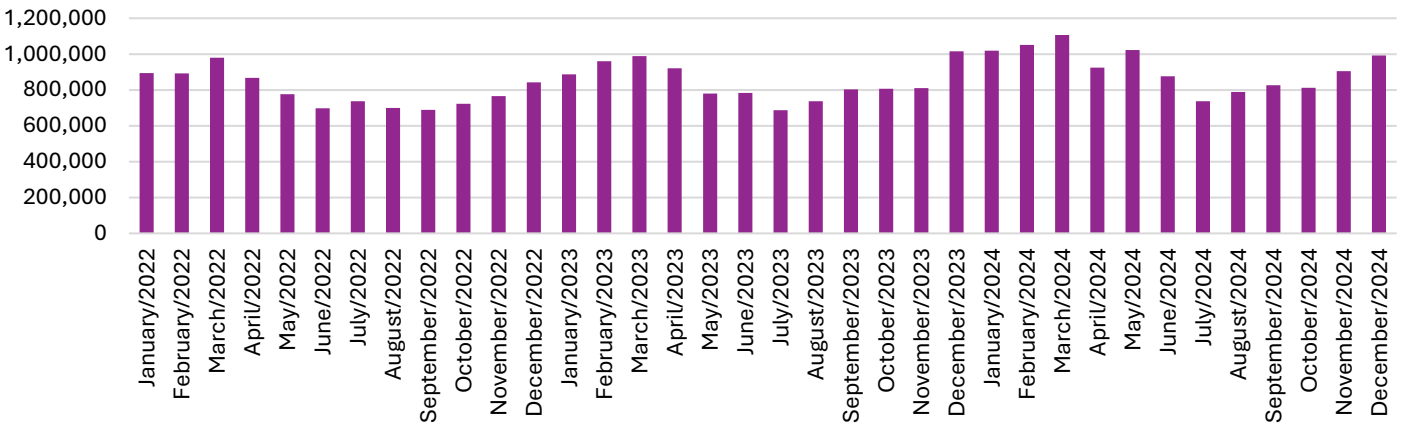
In addition to seasonality, a year-on-year upward trend can be noted in the three indicators. Comparing the first half of 2022 with that of 2024, average energy consumption grew by around 25% and water consumption by approximately 15%, likely reflecting the gradual increase in hotel occupancy and the diversification of tourism services offered.

Monthly charter arrivals also show year-on-year increases, with July 2024 reaching a record of nearly 25,000 visitors, compared to around 20,000 in July 2022. This synergistic growth suggests that the city has increased its tourist appeal, but it also places greater pressure on the electricity and water networks.

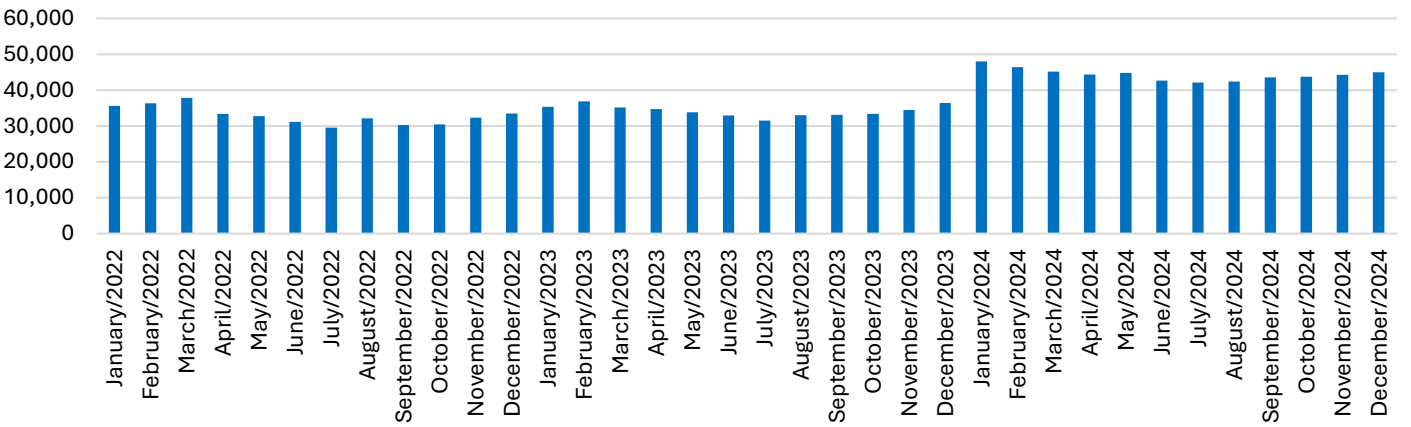
In short, the synchrony between tourist flow and resource consumption in Campos do Jordão is strong and growing. An integrated approach — combining predictive modeling, elasticity analysis, and demand management actions — can ensure operational sustainability and quality of public service even in the face of continued growth in seasonal tourism.

ELDORADO

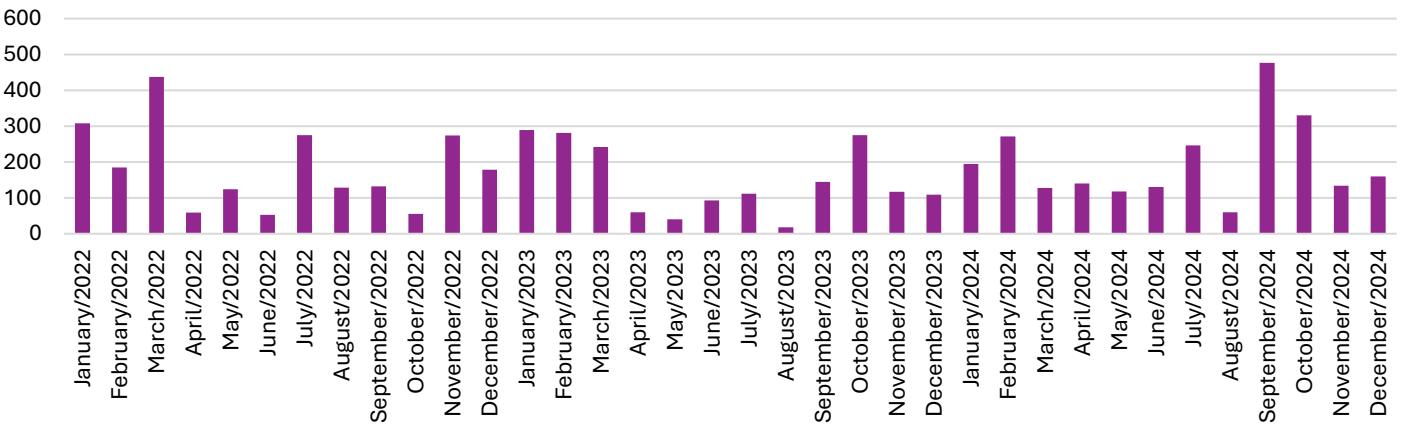
ENERGY CONSUMPTION IN ELDORADO (KWH)



WATER CONSUMPTION IN ELDORADO (M³)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT ELDORADO



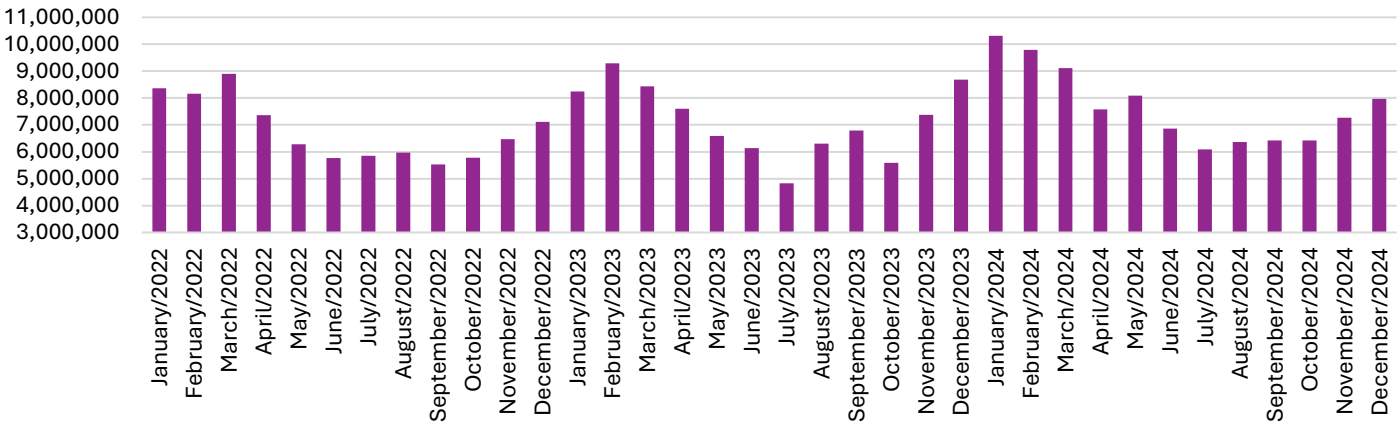
The analysis of data on electricity consumption (kWh), water supply (m³) and occasional charter bus arrivals in Eldorado, from January 2022 to November 2024, reveals seasonal patterns, trends and some discrepancies that can guide local resource and infrastructure planning.

Eldorado's utility and visitor-flow data from January 2022 through December 2024 reveal a pronounced seasonality in both resource consumption and charter-bus passenger arrivals. Electricity demand typically oscillated between 600,000 and 900,000 kWh per month in 2022–23 but climbed above one million kWh at the start of 2024—peaking alongside water withdrawals, which rose from a usual 30,000–40,000 m³ range toward nearly 50,000 m³. Passenger arrivals on occasional and tourist charter buses, measured in headcounts rather than vehicle counts, similarly fluctuated: low-season months saw fewer than 100 arrivals, mid-season months often attracted 200–300 passengers, and peaks reached 477 in September 2024 (with earlier spikes during Carnival and Adventure Week). The close alignment between these coach-arrival highs and utility-usage spikes underscores tourism's growing, if still modest, pressure on Eldorado's infrastructure. To safeguard both service reliability and environmental quality, Eldorado must pursue a sustainability-first framework for energy and water.

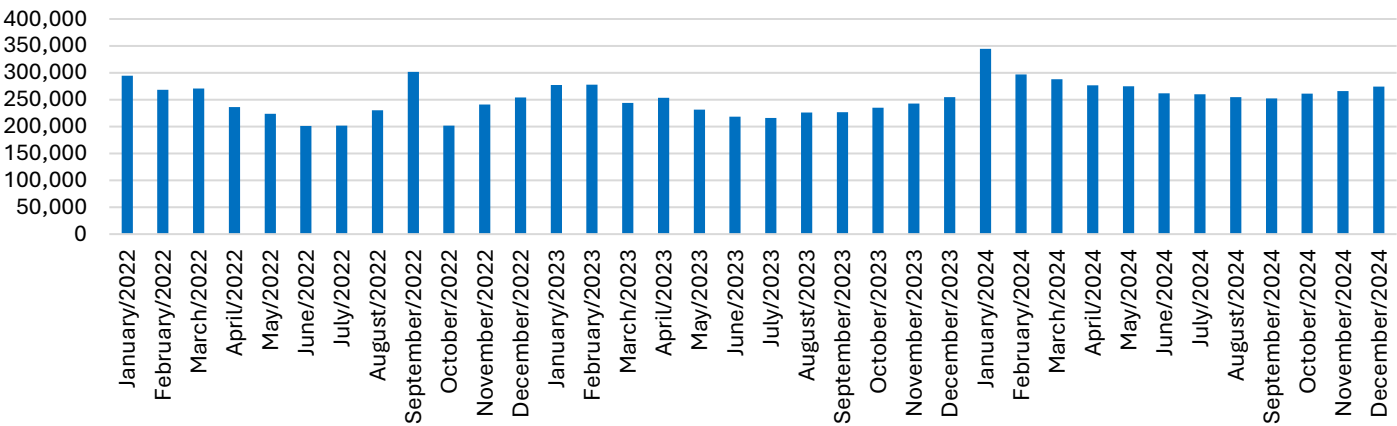
Widespread deployment of rooftop and canopy-mounted photovoltaics can offset daytime peaks, while smart meters and automated demand-response controls (temporarily dimming nonessential lighting or modulating HVAC during coach influxes) will flatten load curves. On the water side, rainwater-harvesting systems can divert a substantial share of roof runoff into irrigation and cleaning, and greywater recycling can cut freshwater withdrawals by up to 30%, preserving reservoir levels during dry spells.

Finally, even as passenger volumes remain in the low hundreds, Eldorado can seize the opportunity to green its incoming coach traffic. Subsidized fast-charging stations at the terminal will accelerate the transition to electric buses, reducing tailpipe emissions for every of the 477 passengers who arrived in September 2024. Integrating these electric-fleet services into a Mobility-as-a-Service platform will discourage private-car trips and smooth last-mile connections. By weaving together renewables, circular-water systems and low-carbon mobility within a unified “city-twin” dashboard, Eldorado can ensure that each tourism surge becomes a step toward truly intelligent, sustainable destination management.

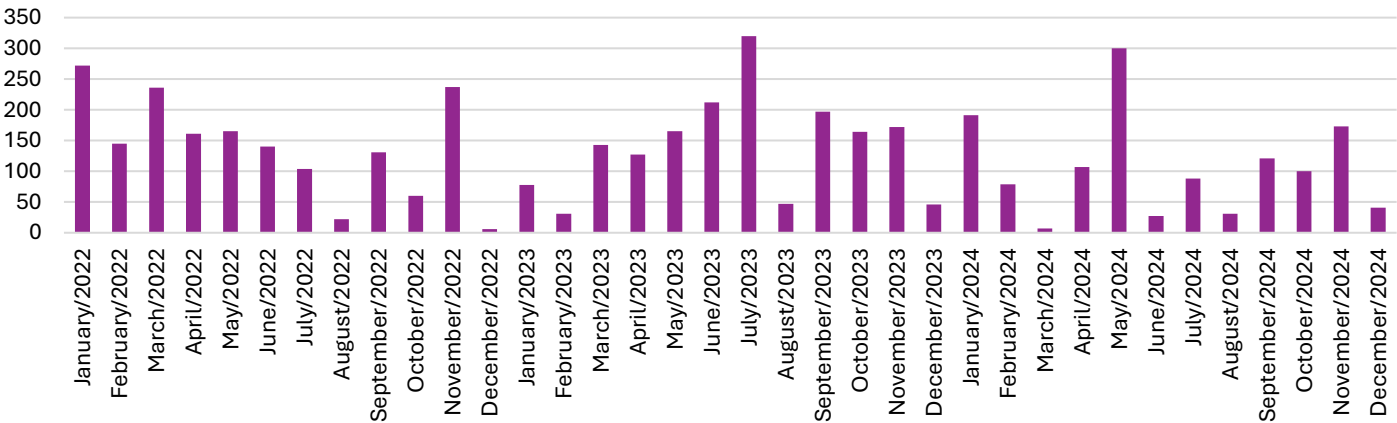
ENERGY CONSUMPTION IN ILHABELA (KWH)



WATER CONSUMPTION IN ILHABELA (M³)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT ILHABELA





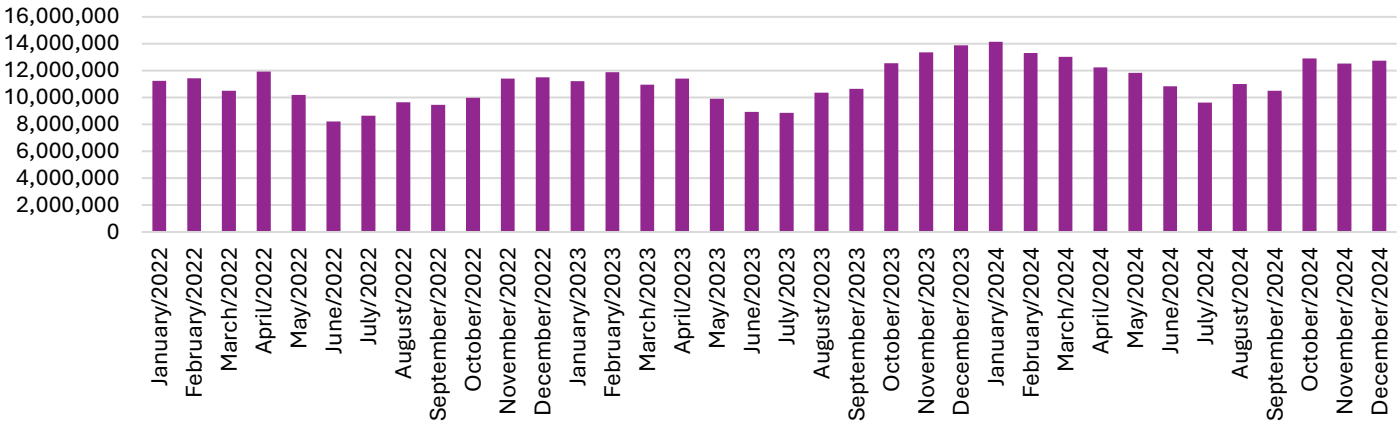
From the analysis of the data, it can be seen that there is a seasonal pattern in Ilhabela. Between January 2022 and November 2024, Ilhabela experiences peaks in energy and water consumption concentrated in the summer. In January, February and March, the demand for air conditioning and water supply reaches values up to 50% higher than in the low season (July/August). For example, while in winter energy consumption varies around 6,000,000 – 7,000,000 kWh, in summer it reaches 9,000,000 – 10,000,000 kWh; water supply jumps from around 250,000 m³ to over 350,000 m³.

When analyzing the numbers from chartered buses, a proxy measure of tourist flow, they also have their peaks in the summer. During the school holidays and carnival months, Ilhabela receives between 200 and 300 visitors; in May 2024, there were up to almost 350 tourists, possibly due to long holidays. This increase in tourists coincides almost immediately with the increase in utility consumption, showing the strong dependence of the tourism sector.

Comparing the first quarter of 2022 with that of 2024, an increase in energy consumption of between 15–20% can be detected in March (from ~9,000,000 to ~10,500,000 kWh). Additionally, an increase of approximately 10% can be observed in the same month in relation to water consumption (from ~330,000 to ~360,000 m³). This indicates that, in addition to seasonality, there is year-on-year growth, resulting from a possible increase in tourist demand. To address this scenario and ensure the sustainability of the infrastructure, some actions focused on efficiency and conservation of resources are recommended, such as the installation of solar panels in public buildings and guesthouses, implementing water reuse for irrigation and cleaning, and encouraging energy efficiency certifications in tourist establishments.

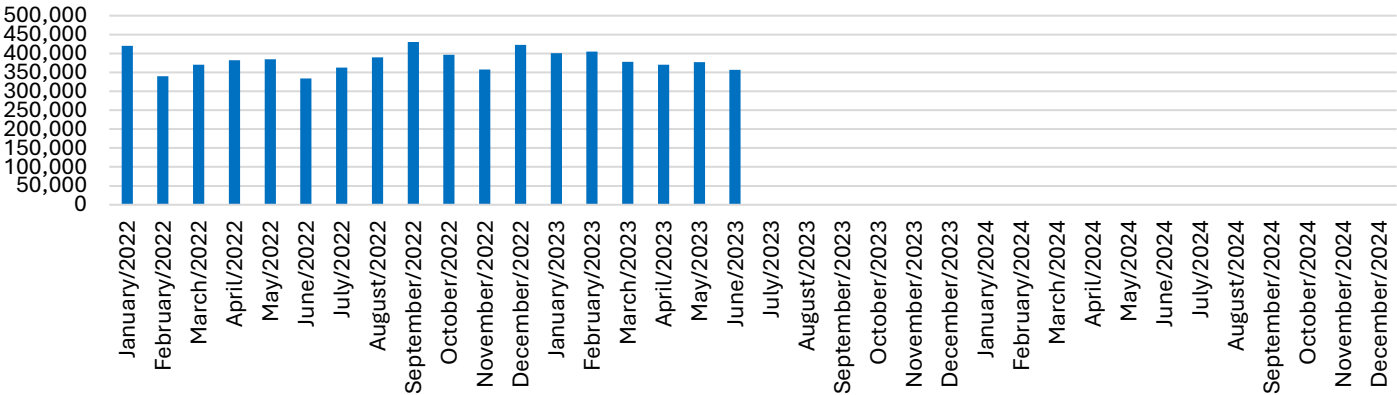
OLÍMPIA

ENERGY CONSUMPTION IN OLÍMPIA (KWH)

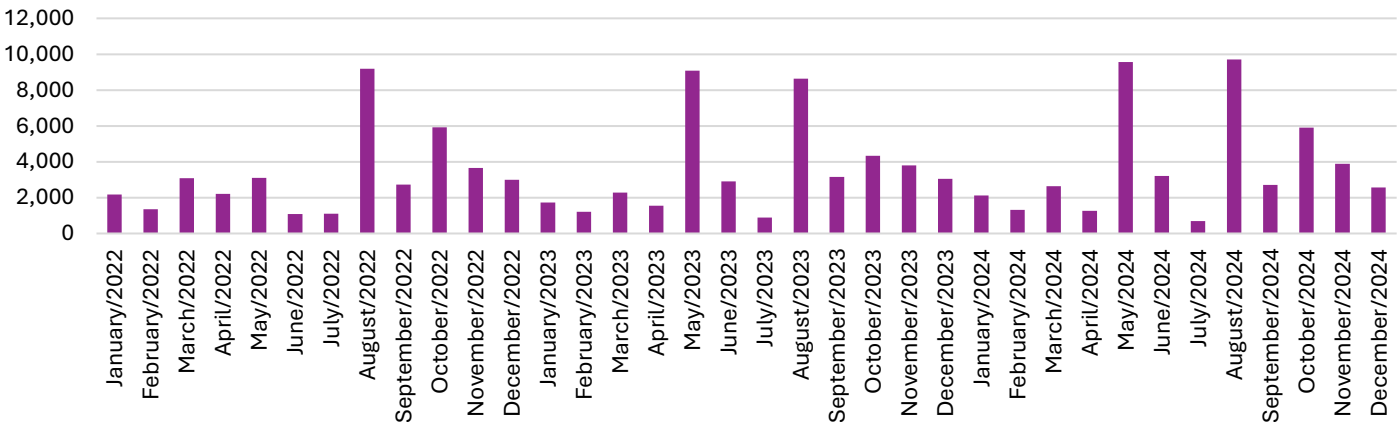


WATER CONSUMPTION IN OLÍMPIA (M³)

(until June 2023)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT OLÍMPIA





The historical series from January 2022 to November 2024 for Olímpia reveals a clear connection between the tourist rhythm — measured by arrivals by chartered buses — and the demand for electricity and water, but it also shows nuances specific to the city's thermal activity and major cultural events.

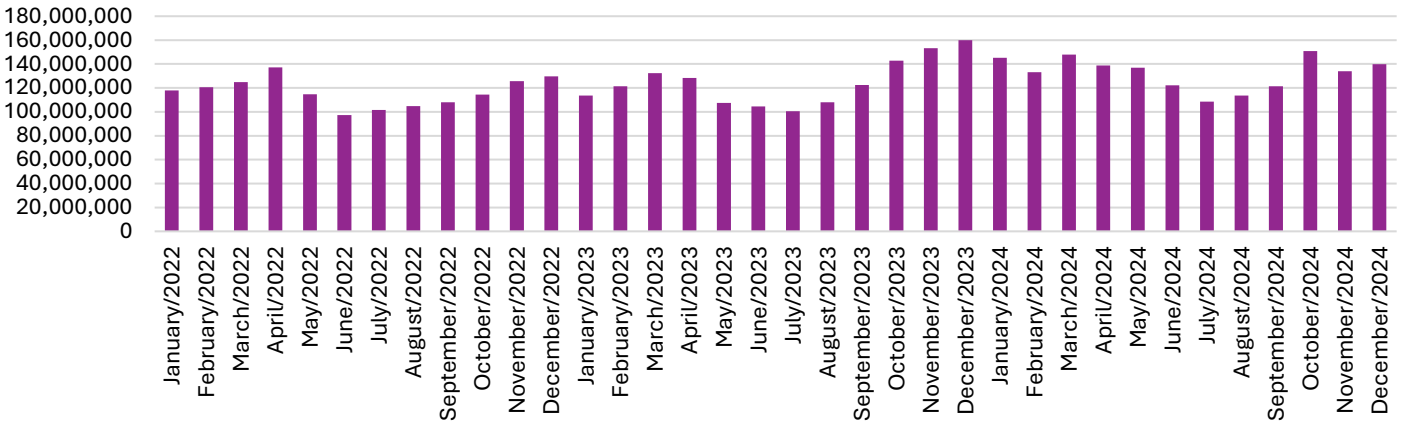
In seasonal terms, the highest numbers of chartered bus arrivals (peaks of around 10,000–12,000 visitors arriving by chartered bus in August each year, on the occasion of the Folklore Festival) coincide with the highest levels of consumption: electricity exceeds 14,000,000 kWh and the water supply reaches 430,000 m³ in that month. Another period of increase occurs during the end-of-year recess (December/January), when the hotel network operates at almost full capacity and consumption for air conditioning and leisure also increases. In the low season months such as May, June and March outside of Carnival, energy consumption drops to between 10–11,000,000 kWh and water consumption to around 360,000 m³, while bus traffic drops to 2,000–4,000 vehicles.

A year-on-year growth trend can also be seen. If in 2022 the monthly average energy consumption was around 12,500,000 kWh, in 2024 this figure will be close to 13,500,000 kWh; the average water supply has grown from around 380,000 m³ to around 400,000 m³ over the same period. This growth reflects both the gradual increase in visitation — with peaks in September 2024 — and the expansion of the infrastructure of hotels, water parks and local businesses.

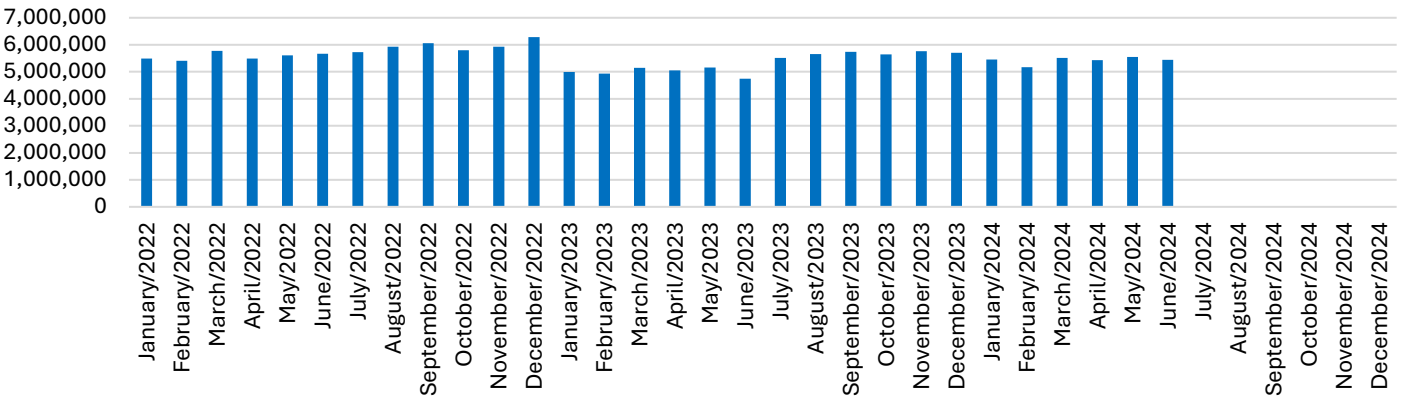
Finally, it is important to highlight that until the end of the report's preparation, the 2024 data regarding Olímpia's water consumption had not yet been released, therefore, information released only up to December 2023 is being considered for this variable.

RIBEIRÃO PRETO

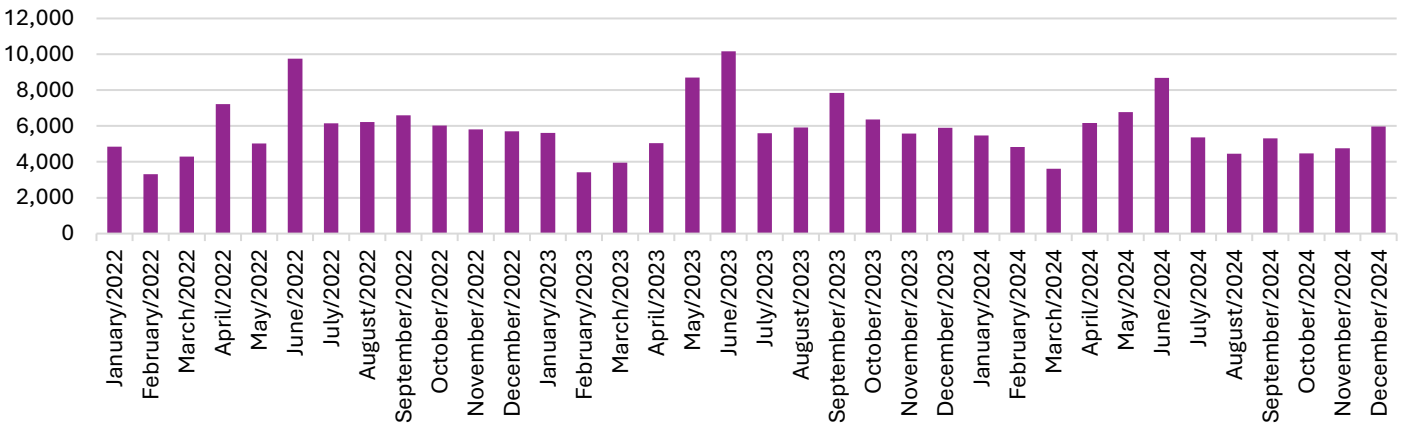
ENERGY CONSUMPTION IN RIBEIRÃO PRETO (KWH)



WATER CONSUMPTION IN RIBEIRÃO PRETO (M³)
(until June 2024)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT RIBEIRÃO PRETO





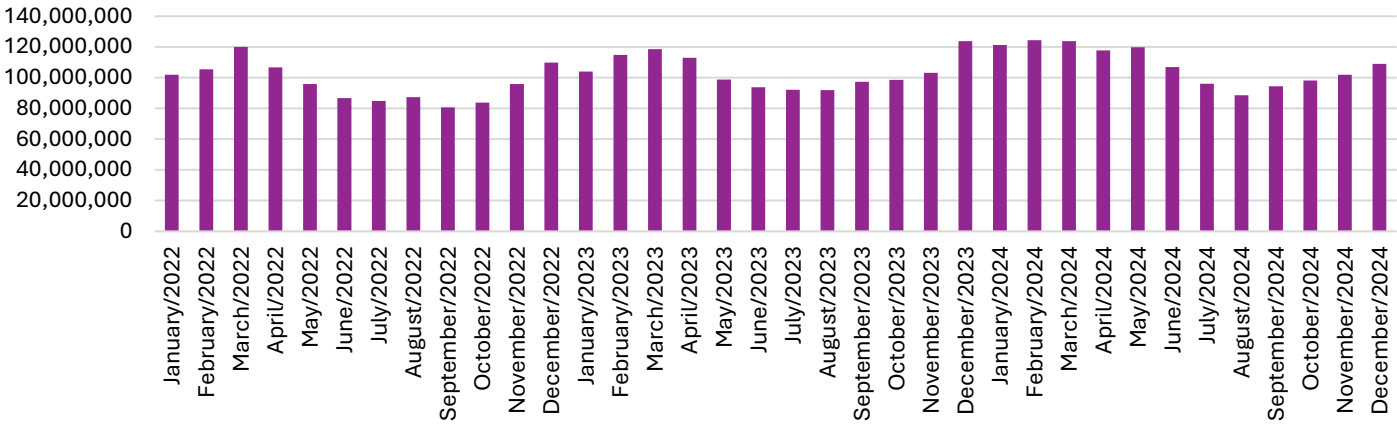
The historical series from January 2022 to November 2024 for Ribeirão Preto reveals three main characteristics: seasonal behavior influenced by the climate, medium-term trends, and a secondary role for tourism mediated by bus charters compared to other tourist cities. First, electricity consumption peaks in the hottest months of the year – typically January, February, and March – when the use of air conditioning and refrigeration in homes, businesses, and industries raises the monthly total to around 14–15 million kWh. In the cold months of June and July, this demand drops to approximately 10–11 million kWh, reflecting the direct influence of temperature on air conditioning equipment. Water supply follows a similar pattern: highs of around 6 million m³ in summer – due to residential consumption and garden irrigation – and lows of around 4.5 million m³ in winter. Second, a slight upward trend is noted year on year. Comparing the first half of 2022 with the same period in 2024, there was an increase of around 10% in average energy consumption and 7% in water consumption, an indicator of population expansion, new ventures and local economic growth — striking characteristics of an agricultural and livestock industrial hub like Ribeirão Preto.

Finally, the indicator of arrivals by occasional charter bus – with peaks of around 10,000 visitors via charter in July (school holidays) and September (Agricultural and Livestock Exhibition) – shows a weak correlation with energy and water consumption. This suggests that, unlike eminently tourist destinations, here the demand for resources is driven more by climate dynamics and daily urban-industrial use than by the flow of visitors.

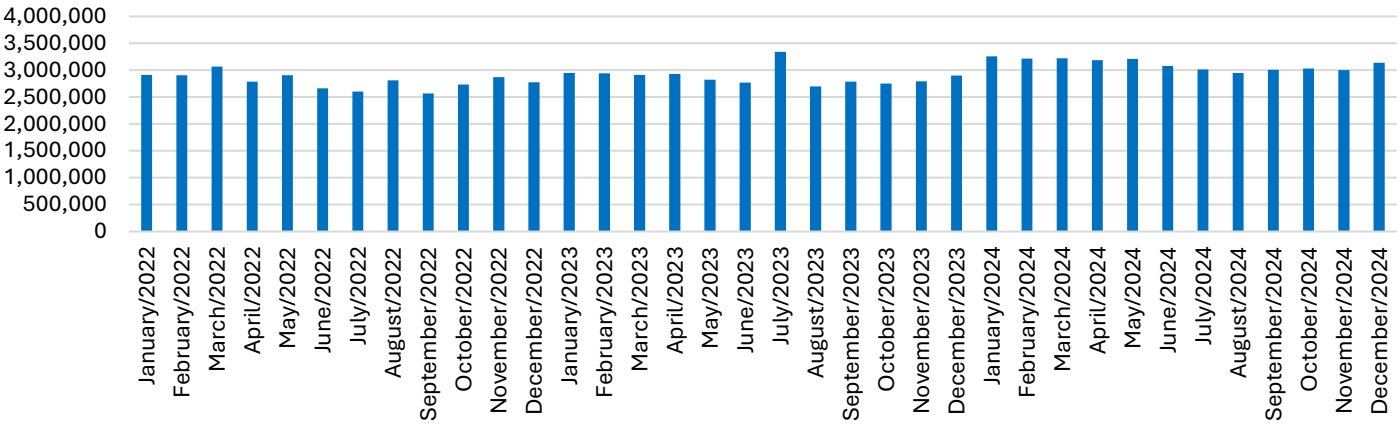
However, it is important to point out that by the end of the report's preparation, the data between July and December 2024 regarding water consumption in Ribeirão Preto had not yet been released, therefore, information released only up to June 2024 is being considered for this variable.

SANTOS

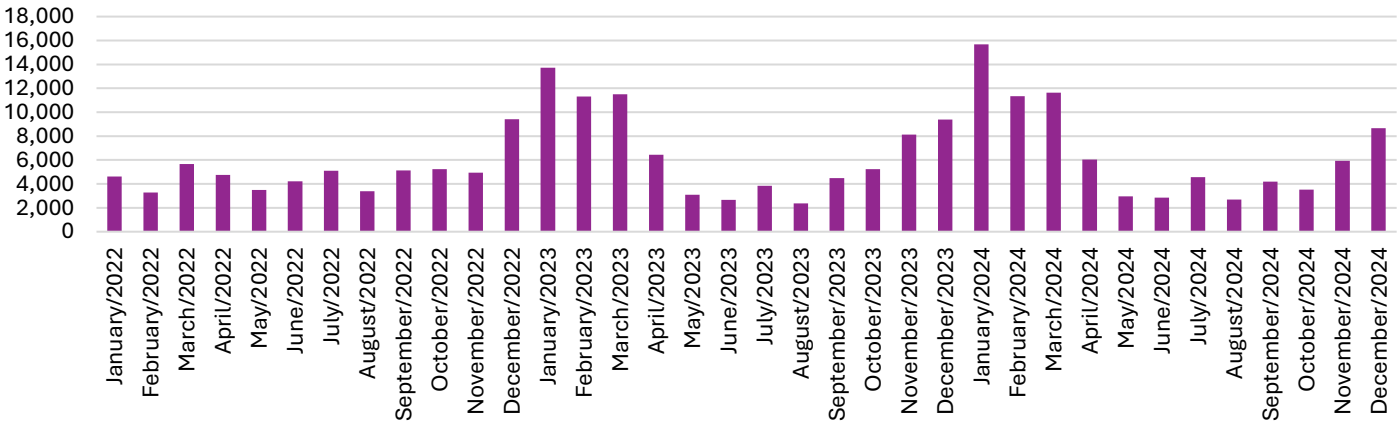
ENERGY CONSUMPTION IN SANTOS (KWH)



WATER CONSUMPTION IN SANTOS (M³)



ARRIVALS ON OCCASIONAL OR TOURIST CHARTER VEHICLES AT SANTOS





Santos's monthly data from January 2022 through December 2024 reveal a clear but moderate seasonality in both utility consumption and charter-bus arrivals. Energy use hovers around 10–11 million kWh per month, with modest peaks in the hot summer months (January–February) when air conditioning demand rises. Similarly, water withdrawals average roughly 3.1–3.3 million m³ monthly, edging upward to nearly 3.5 million m³ during peak beach season. Charter-bus passenger arrivals echo this pattern: low-season counts dip to around 3,000–4,000, while summer months (and Carnival in February) see spikes up to 14,000–15,000 arrivals, before tapering off again in autumn and spring.

The synchronization of these peaks—higher electricity and water consumption coinciding with coach influxes—underscores tourism's role as a driver of resource demand in Santos. Although absolute volumes remain within the city's capacity, the recurring summertime surges place disproportionate strain on the grid, water network and traffic arteries. Without intervention, incremental growth in arrivals could push systems toward their operational limits, especially under climate-driven heatwaves or dry spells.

To embed sustainability and resilience into Santos's tourism model, city managers should pursue an integrated, “seasonality-aware” resource strategy. On the energy front, deploying rooftop and canopy-mounted solar PV arrays at hotels, municipal facilities and parking structures—coupled with community-scale battery storage—will directly offset daytime peaks and enhance grid stability. Smart metering and automated demand-response programs can shave nonessential loads (lighting, pool pumps, HVAC) precisely during the 14,000-passenger coach influxes.

Water-wise measures are equally vital. Rainwater-harvesting systems on high-occupancy buildings can capture roof runoff for landscape irrigation and restroom flushing, potentially reducing freshwater withdrawals by up to 30% in peak months. Greywater recycling—treating shower and sink effluent for reuse—and soil-moisture-sensor-driven irrigation will further preserve potable supplies during the most tourism-intensive periods.

Finally, Santos can green its coach traffic by incentivizing electric-bus fleets—offering fast-charging stations at key terminals and priority curb access—thus cutting tailpipe emissions for every summer visitor. Embedding these services in a Mobility-as-a-Service platform will encourage seamless transfers to bike-share, BRT and metro, reducing private-vehicle congestion around the waterfront. By weaving together renewable generation, circular-water systems, low-carbon mobility and real-time arrival and utility dashboards, Santos can turn its seasonal tourism peaks into a blueprint for intelligent, sustainable destination governance—preserving its coastal assets and ensuring reliable service for both residents and visitors.

QUALITY OF COASTAL BEACHES IN THE STATE OF SÃO PAULO

The coastline of São Paulo is approximately 880 km long and covers 16 municipalities, with a total area of 7,759 km². The three UGRHs (Water Resource Management Units, in the Portuguese acronym) that encompass the coastal municipalities are: Litoral Norte (UGRHI 3), Baixada Santista (UGRHI 7) and Ribeira do Iguape/Litoral Sul (UGRHI 11) and together have more than 300 beaches, making up a coastline that is very popular with locals and tourists.

The bathing conditions of the coastal beaches of the state of São Paulo are closely related to the sanitary conditions of these municipalities, which, in turn, are determined by the basic sanitation infrastructure, the permanent population, the influx of tourists (floating population) and the weather conditions, among other factors. Therefore, to better understand the fluctuations in the quality of the waters of coastal beaches, it is important to correlate them with the advances observed in basic sanitation, with population growth and the presence of a floating population, as well as with the occurrence of irregular occupations.

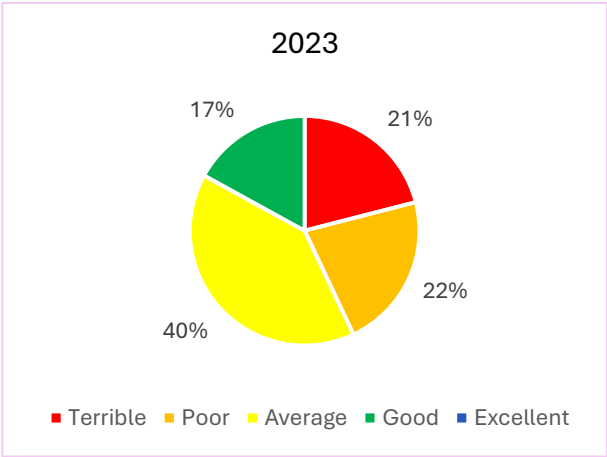
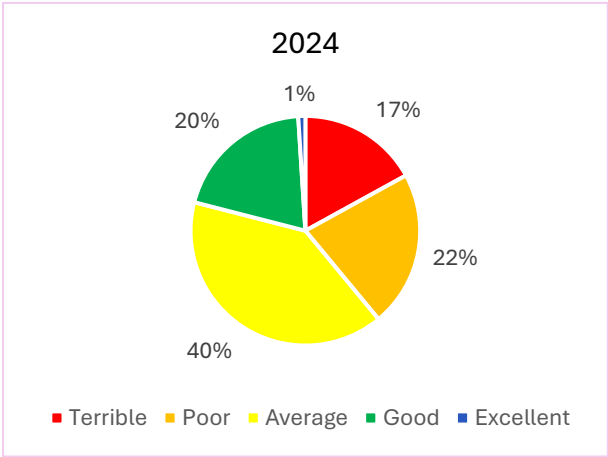
(Source: Environmental Company of the State of São Paulo - CETESB)

CITE presents below the summary of the 2024 Report on the Quality of Coastal Beaches in the State of São Paulo, produced by CETESB. The full report, sent by CITE to all cities on the coast of São Paulo, is extremely important for environmental monitoring and the development of sustainable actions.

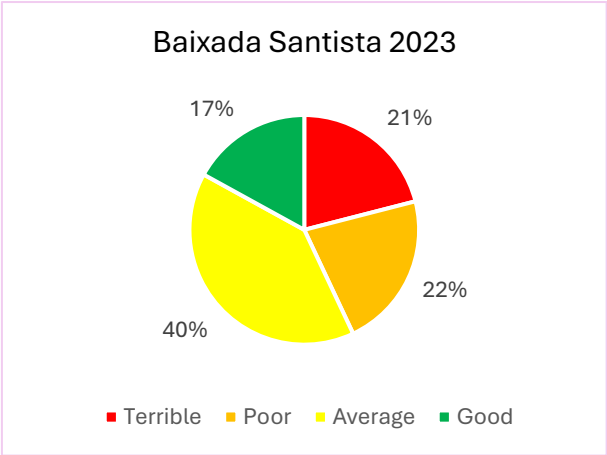
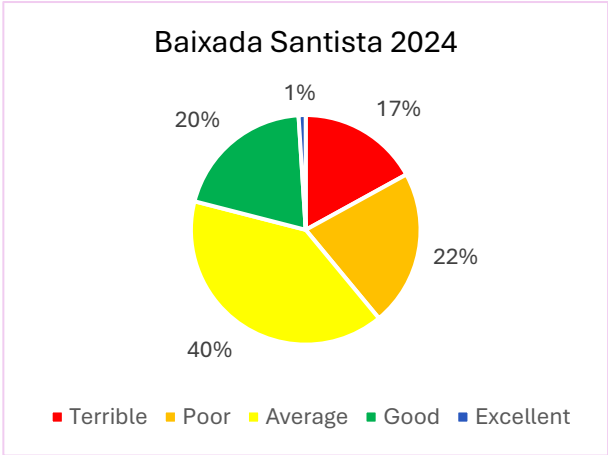
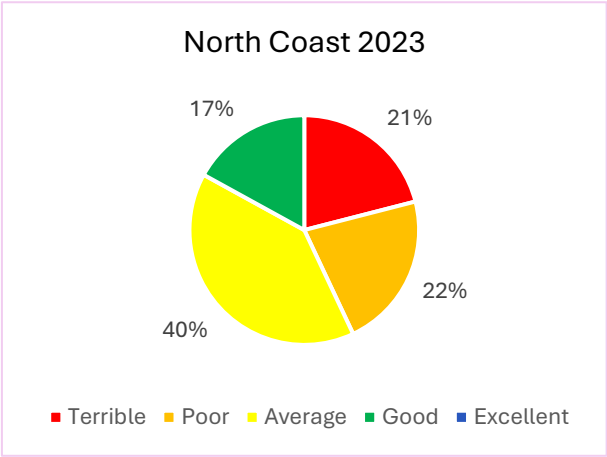
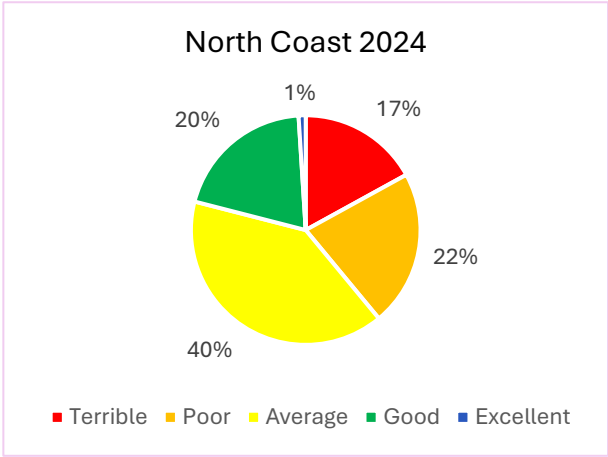
For the full document (in Portuguese): <https://cetesb.sp.gov.br/praias/publicacoes-relatorios>

ANNUAL CLASSIFICATION OF BEACHES ON THE COAST OF SÃO PAULO

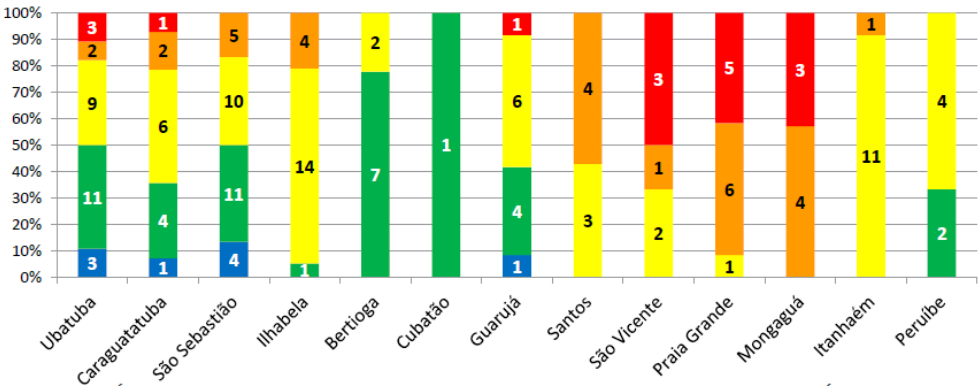
Analyzing the bathing conditions of beaches on the coast of São Paulo through the distribution of annual classifications in relation to the previous year, it can be seen that in 2024 there was an improvement in the annual classifications Excellent and Good (from 25 to 33%). There was a decrease in the number of beaches classified as Average and Poor. The beaches considered Terrible remained at a similar percentage.



For the North Coast (where Ilhabela is located), the percentage of beaches that are accessible all year round (Excellent and Good) showed a significant increase, indicating improvement. In Baixada Santista (where Santos is located), the conditions were similar with a slight increase in Excellent and Good beaches and a decrease in Average and Poor beaches.



The distribution of annual classifications by municipality shows that in eight of them, beaches with a Good classification were found, one municipality less than in 2023 (Itanhaém). Only four municipalities had beaches with an Excellent classification in 2024, (three on the North Coast and one in Baixada Santista - Guarujá).



Proportion of 2024 annual rankings by municipality in percentage and number of beaches

EVOLUTION OF THE ANNUAL CLASSIFICATION OVER THE LAST 20 YEARS

The following tables summarize the annual quality of all beaches assessed in the coastal municipalities of the state of São Paulo. They are listed in geographic order from North to South, covering a 20-year assessment period.

The temporal analysis highlights a striking distinction between two ten-year periods: from 2005 to 2014 and from 2015 to 2024. On the North Coast, it was observed that the first period presented better bathing conditions than the second. In Baixada Santista, this trend is repeated in the municipalities of Santos and Mongaguá, while in Bertioga and Praia Grande the opposite behavior is observed, with an improvement in conditions in the second period.

In spatial terms, it is observed that some municipalities have regions with relatively homogeneous bathing quality. This is the case of the south of Caraguatatuba, the north of São Sebastião and the central areas of Ubatuba. In Baixada Santista, the homogeneity in the annual classifications between the municipalities located between the central region of Santos and Praia Grande stands out, differentiating themselves from the rest of the coast.

NORTH COAST

	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
UBATUBA																				
PICINGUABA																				
LAGOA PRUMIRIM																				
PRUMIRIM																				
FÉLIX																				
ITAMAMBUCA																				
RIO ITAMAMBUCA																				
VERMELHA DO NORTE																				
PEREQUÊ-AÇU																				
IPEROIG																				
ITAGUÁ - nº 240 da Av. Leovegildo D. Vieira																				
ITAGUÁ - nº 1676 da Av. Leovegildo D. Vieira																				
TENÓRIO																				
VERMELHA																				
GRANDE																				
TONINHAS																				
ENSEADA																				
SANTA RITA																				
PEREQUÊ-MIRIM																				
SUNUNGA																				
LÁZARO																				
DOMINGAS DIAS																				
DURA																				
FORTALEZA																				
LAGOINHA - Av. Engenho Velho																				
LAGOINHA - Ao lado do camping																				
SAPÉ																				
MARANDUBA																				
PULSO																				

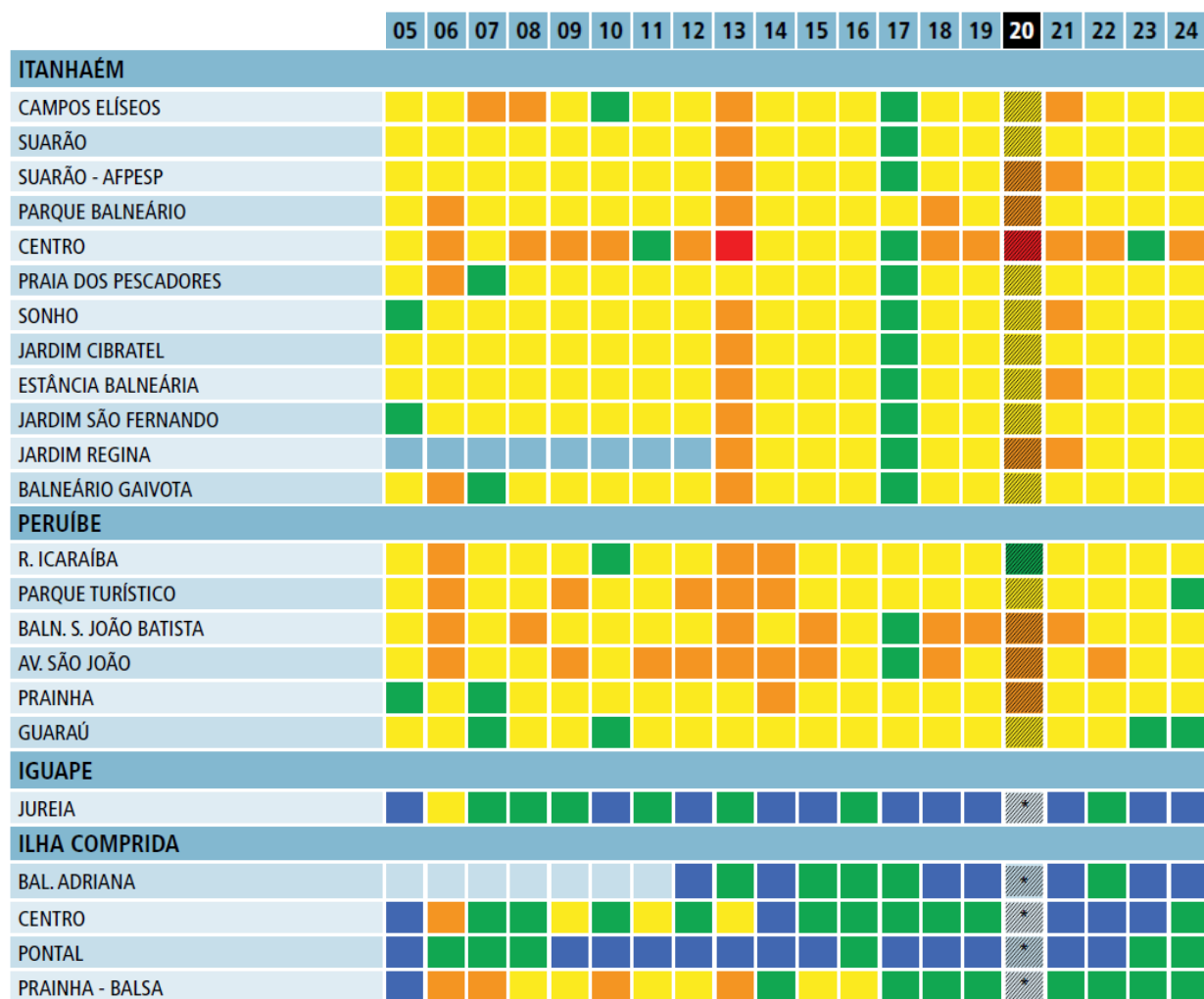
	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
CARAGUATATUBA																				
TABATINGA - Cerca de 250 m do Rio Tabatinga																				
TABATINGA - Condom. Gaivotas																				
MOCOCA																				
COCANHA																				
MASSAGUAÇU - R. Maria Carlota																				
MASSAGUAÇU - Av. M.H. Carvalho																				
CAPRICÓRNIO																				
LAGOA AZUL																				
MARTIM DE SÁ																				
PRAINHA																				
CENTRO																				
INDAIÁ																				
PAN BRASIL																				
PALMEIRAS																				
PORTO NOVO																				
SÃO SEBASTIÃO																				
PRAINHA																				
CIGARRAS																				
SÃO FRANCISCO																				
ARRASTÃO																				
PONTAL DA CRUZ																				
DESERTA																				
PORTO GRANDE																				
PRETA DO NORTE																				
GRANDE																				
BAREQUEÇABA																				
GUAECÁ																				
TOQUE-TOQUE GRANDE																				
TOQUE-TOQUE PEQUENO																				
SANTIAGO																				
PAÚBA																				
MARESIAS																				
MARESIAS - Trav. XV																				
BOIÇUCANGA																				
CAMBURIZINHO																				
CAMBURI																				
BALEIA																				
SAÍ																				
PRETA																				
JUQUEÍ - Travessa Lusíadas																				
JUQUEÍ - R. Cristiana																				
UNA																				
ENGENHO																				
JUREIA DO NORTE																				
BORACEIA																				
BORACEIA - R. Cubatão																				

	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
ILHABELA																				
ARMAÇÃO																				
PINTO																				
SINO																				
SIRIÚBA																				
VIANA																				
BARREIROS NORTE																				
BARREIROS SUL																				
SACO DA CAPELA																				
ENGENHO D'ÁGUA																				
ITAQUANDUBA																				
ITAGUAÇU																				
PEREQUÊ																				
ILHA DAS CABRAS																				
PORTINHO																				
FEITICEIRA																				
JULIÃO																				
GRANDE																				
CURRAL																				
VELOSO																				

BAIXADA SANTISTA AND SOUTH COAST

	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
BERTIOGA																				
BORACEIA - Colégio Marista																				
BORACEIA - Sul																				
GUARATUBA																				
SÃO LOURENÇO - próximo ao morro																				
SÃO LOURENÇO - Lgo. Dos Coqueiros																				
ENSEADA - Indaiá																				
ENSEADA - Vista Linda																				
ENSEADA - Colônia do SESC																				
ENSEADA - R. R. Costabile																				
GUARUJÁ																				
IPORANGA																				
PEREQUÊ																				
PERNAMBUCO																				
ENSEADA - Estrada de Pernambuco																				
ENSEADA - R. Uruguai																				
ENSEADA - R. Chile																				
ENSEADA - Av. Santa Maria																				
PITANGUEIRAS - Av. Puglise																				
PITANGUEIRAS - R. Sílvia Valadão																				
ASTÚRIAS																				
TOMBO																				
GUAIÚBA																				

	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
CUBATÃO																				
RIO PEREQUÊ																				
SANTOS																				
PONTA DA PRAIA																				
APARECIDA																				
EMBARÉ																				
BOQUEIRÃO																				
GONZAGA																				
JOSÉ MENINO - R. Olavo Bilac																				
JOSÉ MENINO - R. F. Ozanan																				
SÃO VICENTE																				
PRAIA DA DIVISA																				
ITARARÉ - Posto 2																				
ILHA PORCHAT - Rua 11 de Junho																				
MILIONÁRIOS																				
GONZAGUINHA																				
PRAINHA - Av. Santino Brito																				
PRAIA GRANDE																				
CANTO DO FORTE																				
BOQUEIRÃO																				
GUILHERMINA																				
AVIAÇÃO																				
VILA TUPI																				
OCIAN																				
VILA MIRIM																				
MARACANÃ																				
VILA CAIÇARA																				
REAL																				
FLÓRIDA																				
JARDIM SOLEMAR																				
MONGAGUÁ																				
ITAPOÃ - Vila São Paulo																				
CENTRAL																				
VERA CRUZ																				
SANTA EUGÊNIA																				
ITAÓCA																				
AGENOR DE CAMPOS																				
FLÓRIDA MIRIM																				



EVOLUTION OF THE ANNUAL CLASSIFICATION OF BEACHES BY MUNICIPALITY

- **Ubatuba:** it is observed that there is a group of beaches near the central region whose classifications were predominantly Average, Poor or Terrible, which can be explained by their population concentration in the urban area, the presence of high-flow rivers and the fact that these beaches are located in a bay. Another region that stands out in this way is the one that includes the beaches of Enseada, Santa Rita and Perequê-Mirim, also located in a bay. In the other regions of the municipality, in the first period (from 2005 to 2014), there was a greater number of Good and Excellent beaches, these classifications tended to Average in the second period (from 2015 to 2024);
- **Caraguatatuba:** the beaches north of Lagoa Azul had a predominance of Good classifications (except for the Tabatinga point near the river); in the stretch from Martin de Sá to Porto Novo, where the municipality's population is concentrated, the classifications remained the same, predominantly Poor and Average in the 20 years analyzed;

- **São Sebastião:** the stretch where the beaches are located in the São Sebastião Channel (close to the urban center) or North Coast, is the most compromised, with classifications that predominantly ranged between Average and Poor in the 20 years analyzed. In the other points, located on the South Coast, it is noted that in the first period, there was a greater number of Good and Excellent classifications, while in the second period, there was an increase in the number of beaches classified as Average;
- **Ilhabela:** the municipality's beaches remained stable in relation to the annual classifications;
- **Bertioga:** in the municipality, there was an increase in the number of beaches classified as Good in the second period, mainly on the beaches to the north;
- **Guarujá:** until 2010, there were no records of beaches classified as Poor or Terrible, with the exception of Praia do Perequê. Since then, there has been an increase in this classification, especially in some areas of Enseada beach;
- **Santos:** in the first period, the municipality had the highest number of beaches classified as Poor; between 2018 and 2022, there was an increase in beaches classified as Terrible. However, in the last two years, there was some improvement. In 2024, three beaches were classified as Average, a fact that had not happened since 2003;
- **São Vicente:** in the municipality, there is a clear difference in quality between the beaches located in the Santos Bay, which is more open and has more traffic (Divisa, Itararé and Ilha Porchat, with a higher incidence of Average ratings) and the beaches located in the São Vicente Bay (Milionários, Gonzaguinha and Prainha, with a predominance of Terrible ratings). In general, the annual rating of the municipality's beaches remained stable;
- **Praia Grande:** in this municipality there are also two groups of beaches, one to the north, between Canto do Forte and Ocian, and the other to the south, from Vila Mirim to Jardim Solemar. In the group of beaches to the north, it can be seen that in the first period there was a predominance of Poor ratings and in the second period, Average. In the group of beaches to the south, it can be seen that in the first period there was a greater concentration of beaches classified as Terrible and that these beaches evolved to a predominantly Poor rating in the second period. However, in the last two years, this trend of improvement was not observed;
- **Mongaguá:** in the municipality, there has been a reduction in the number of beaches classified as Average in the last seven years and a higher incidence of beaches classified as Poor in the second period, indicating a worsening in quality;
- **Itanhaém:** the annual classifications of this municipality have remained stable over the years, with the exception of 2017;
- **Peruíbe:** the beaches have shown an increase in Average classifications in the second period;
- **Ilha Comprida:** it is worth noting that the beaches are sampled monthly, so the annual classification is different. It is observed that until 2013, there was a high incidence of beaches classified as Poor and that from then on, Good and Excellent classifications predominated.

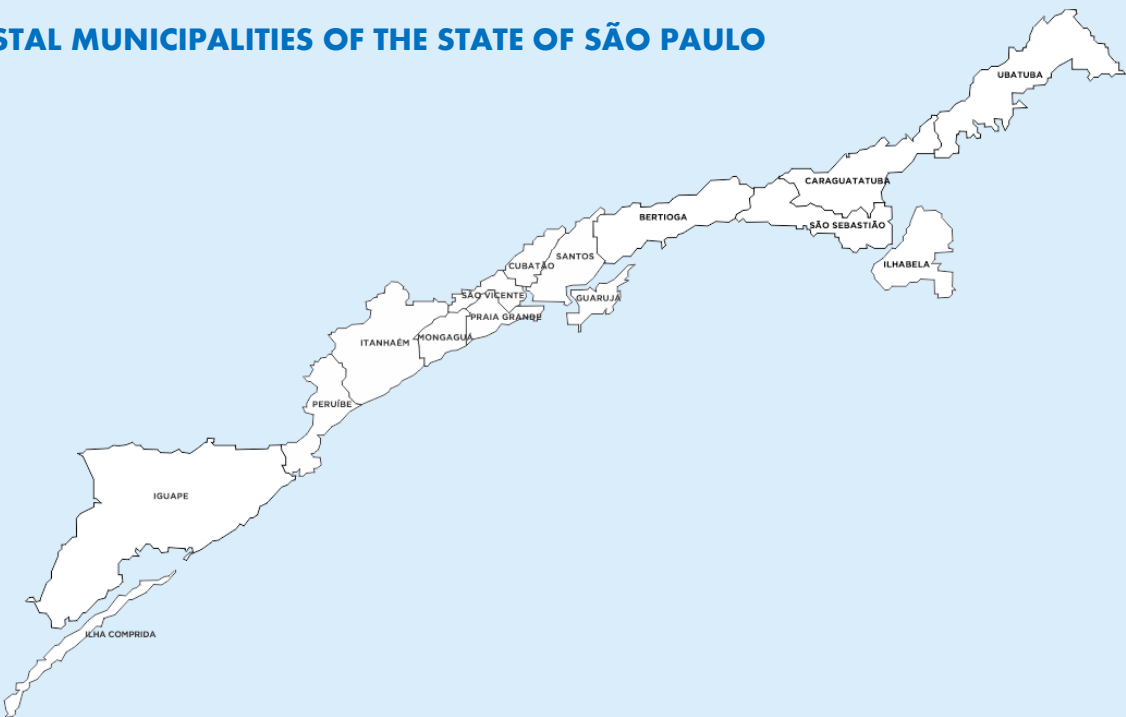
GENERAL CONCLUSIONS ON BEACHES MONITORING

In 2024, the beaches that remained suitable 100% of the time, that is, those that were rated Excellent or Good, accounted for 33% of the monitored beaches. This rate was higher than the previous year, mainly due to the improvement of the beaches on the North Coast. The municipalities of Ubatuba and São Sebastião on the North Coast were those that had the highest number of beaches classified as suitable throughout the year.

Regarding the average concentrations of Enterococci, the values obtained in 2024 showed similar behavior to those of previous years. In the comparison between regions, the North Coast has shown a stable average, at 15 CFU/100mL, while in Baixada Santista there was a decrease in this average, from 31 to 28 CFU/100mL. This year, the beaches of the municipalities of São Vicente, Praia Grande, Guarujá and Mongaguá recorded the highest concentrations of Enterococci, while the lowest concentrations were recorded in Bertioga and Peruíbe.

Basic sanitation infrastructure is a fundamentally important parameter in controlling fecal pollution, since expanding the collection and treatment of sewage in coastal municipalities has a positive impact on bathing conditions. Despite this, the negative effects of heavy rainfall must also be taken into account, which in some situations can outweigh the beneficial effects of improving sanitation infrastructure, potentially harming the quality of seawater. Furthermore, areas without sewage network coverage, often due to irregular occupation, generally dump their sewage into watercourses, generating diffuse pollution that is exacerbated by rainfall, which contributes to compromising the quality of beaches. This situation has been reflected in the number of unsuitable beaches, which reinforces the need for continued investment in the sanitation sector, as well as integrated actions between management bodies and organized civil society, aiming to improve urban planning and development and the bathing conditions of São Paulo's beaches.

COASTAL MUNICIPALITIES OF THE STATE OF SÃO PAULO



FINAL CONSIDERATIONS

In the state of São Paulo, the nine monitored cities offer a diverse panorama that highlights both the challenges and opportunities for sustainable development. From the vibrant economic activity and major events in Campinas and Ribeirão Preto to the ecotourism of Brotas and the religious pilgrimage in Aparecida, each locality has its own unique identity and socio-economic circumstances. In this context, issues such as dignified work, economic growth, sustainable consumption, and production gain prominence, calling for a strategic and holistic approach to promoting balanced and sustainable development in these regions.

Dignified work and economic growth, as well as sustainable consumption and production, are two fundamental pillars that deserve special attention in these cities. Campinas and Ribeirão Preto, as important urban centers, face the challenge of promoting job opportunities that respect workers' rights while seeking to maintain a pace of sustainable economic growth. In contrast, in municipalities like Brotas and Eldorado, employment concerns are often linked to tourism and agriculture, requiring policies that protect workers and promote local development.

In summary, the nine monitored cities in the state of São Paulo face distinct challenges, yet they share the need to promote decent work, economic growth, sustainability, and tourism in their communities. It is imperative that policies and initiatives be tailored to local realities, considering the specific characteristics and needs of each municipality to achieve genuinely inclusive and sustainable development.

Tourism plays a crucial role in the sustainable development of cities. By attracting visitors, it boosts the local economy, generating revenue that can be reinvested in local projects, while also encouraging the conservation of natural and cultural resources. Recognizing the economic value of these activities motivates communities to protect and manage them sustainably, significantly contributing to environmental and cultural preservation.

In this context, monitoring indicators of sustainable tourism in each of these nine cities plays a key role in their development and continuous improvement. By analyzing these indicators, municipal authorities can better understand the impact of tourism activities in their regions and identify areas that require special attention. Additionally, ongoing monitoring helps cities assess progress over time and adjust their strategies as needed, ensuring they are on the right path toward more sustainable and responsible tourism.

SUPPORT

- Aparecida Tourism Secretariat (<https://www.aparecida.sp.gov.br/portal/turismo>).
- Brotas Municipal Tourism Secretariat (<https://www.brotas.sp.gov.br/secretarias/turismo>).
- Campinas Department of Tourism (<https://portal.campinas.sp.gov.br/secretaria/cultura-e-turismo/pagina/boletim-de-indicadores-do-turismo>).
- Campos do Jordão Tourism Observatory (<https://drive.google.com/file/d/1o4V-jj8nfzn2qWedpqrwwokcBjSIRJn/view?usp=drivesdk>).
- Ilhabela City Tourism Observatory (<https://turismoilhabela.com/observatorio/>).
- Regional Observatory of Tourism and Events of Olímpia and Region – ORTE (<https://www.orteobservatorio.com.br/>).
- Municipal Secretariat of Culture and Tourism of Ribeirão Preto (<https://www.ribeiraopreto.sp.gov.br/portal/culturaeturismo/>).
- Santos Secretariat of Entrepreneurship, Creative Economy, and Tourism – SEECTUR (<https://www.turismosantos.com.br/>).

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