

Preliminary Study

Colégio dos Jesuítas, Rua dos Ferreiros

9000-082 – Funchal

Index



02

Introduction

04

About

17

The Tourism Observatory

20

Participatory Processes

22

Sector Challenges

26

Monitoring Processes

30

Key Elements

39

Conclusion

41

References

44

Annexes

Introduction



Introduction

Madeira has a strong tourism industry, taking its first steps back in the fifteenth century because of the increase in sea routes and the importance given to botany (Visit Madeira, 2022a). Throughout the nineteenth and twentieth centuries, Madeira became a mandatory reference for the European aristocracy who visited or set up temporary residence in the Region, attracted by the natural therapeutic qualities of the island. Some examples of personalities who have visited and lived in Madeira Island can be illustrated in the following lines:

“Antero de Quental, Júlio Dantas, Júlio Diniz, Príncipe Alexandre do Países Baixos, Rainha Adelaide de Inglaterra, Imperatriz Elizabeth da Áustria (...) Imperatriz D. Amélia do Brasil e a sua filha Princesa Maria Amélia, Winston Churchill, James Cook, Capitão Scott (...), John Houston e Gregory Peck (...) Carlos I da Áustria (...)” (Caldeira, 2018, p.31)

Over the years, the tourism sector in the Autonomous Region of Madeira has been growing, registering record figures in 2017 and 2018. On the heels of this growth, and with a view to the future, the Madeira Tourism Board engaged in a procedure to develop a new strategy for tourism, which ensured a positive impact at economic, environmental and social level.

The importance of tourism sustainability has been one of the main concerns, therefore the Government of Madeira has decided to apply for the recognition of the Autonomous Region of Madeira as a sustainable tourism destination by the Global Sustainable Tourism Council. In 2022, the Region achieved EarthCheck Bronze Benchmarked status.

To measure progress on the sustainable tourism development goal, a framework that evaluates the sustainability of tourism development ought to be established. This framework should include the following criteria:

- The ways in which sustainable tourism are measured must reflect the vision, goals and actions outlined by the Tourism Observatory, which represents a community-based approach to tourism planning and development;
- Alignment with global best practices in sustainable tourism monitoring;
- A flexible and collaborative approach to monitoring, communication of results and identification of priorities.

Implementing the framework and becoming an INSTO member will provide the tourism sector with knowledge and critical thinking on the state of sustainability within the industry. This knowledge will help the sector to establish priorities and make informed decisions and investments that support sustainable tourism development.

About



Tourism in Madeira

The Autonomous Region of Madeira is located in the Atlantic Ocean, between the African continent (about 700km west of the coast) and the American continent. It is located between latitude 30° and 33° north, 978km southwest of Lisbon and 450km north of the Canary Islands.

Tourism in the Autonomous Region of Madeira is recognized nationally and worldwide for several attributes that make it unique for tourists. One of these is its climate, attracting many people from Nordic countries to travel to the islands of Madeira and Porto Santo to enjoy the mild temperature (Marujo, 2013). The landscapes, such as Pico do Areeiro or the *levadas*, are fundamental in promoting and attracting visitors. Madeira and Porto Santo culture is also an attraction, its regional cuisine, the religious festivals, museums, music and folklore, handcraft, and architectural heritage.

For these reasons, the islands offer the ideal setting to study new products in the field of tourism, such as well-being, senior tourism, nautical tourism, and enogastronomy tourism.

Of particular note are the tourist events that have emerged to highlight the elements that the Region presents best: Carnival, Flower Festival (highlighting the Region's flowers), Atlantic Festival (elects fireworks for the end of the year), Wine Festival (highlighting Madeira wine), Columbus Festival (highlights the history and landing of Cristóvão Colombo on the island of Porto Santo), Nature Festival (emphasizes the nature of the Region through a set of activities) and finally, the Christmas and New Year's Eve Festivities.

In 2020, the Region was featured on the NASA website, with the latter designating Madeira as the “Island of eternal springtime” (NASA, 2020).

Madeira Island is the ideal place to practice nature-related activities such as hiking, cycling, mountain biking, *levadas*, sailing, diving, boat or catamaran trips and sailing side by side with dolphins.

Porto Santo Island has an extensive beach (9 km) with rare therapeutic properties bathed by turquoise and translucent waters (Visit Madeira, 2022). This island also includes thalassotherapy programs.

Madeira and Porto Santo Islands are recognized nationally and internationally as very special places to spend a memorable vacation. Its tourist potential and qualities have been reinforced by renowned awards attributed to Madeira over the years.

Madeira was elected “World’s Leading Island Destination” in 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, and 2024 by the *World Travel Awards*. It also received the title of “Europe’s Leading Island Destination” in 2013, 2014, 2016, 2017, 2018, 2019, 2020, 2021, and 2023, competing in this category alongside major tourist destinations such as the Canary Islands, Balearic Islands, Sardinia, Malta, and Cyprus, among others (Visit Madeira, 2025).

The Guinness World Records, an organization that certifies the records achieved worldwide, attributed to the 8-minute fireworks show that marked the passing of the year in Madeira, from 2006 to 2007, entitled “World’s Largest Fireworks Display”.

The spectacular landscape boasts one of the biggest tourist attractions of Madeira. Its lush vegetation hides the fascinating indigenous laurel forest, recognized by UNESCO in 1999 as Natural Heritage of Humanity (Visit Madeira, 2022a).

The World Centre of Excellence for Destinations (CED), a body overseen by the World Tourism Organization (UNWTO), awarded Madeira Destination, the title of Quality Excellence, in November 2009.

The municipality of Santana, located on the northern coast of Madeira Island, was honored by UNESCO with the distinction of “Biosphere Reserve”, in June 2011, recognizing the richness of an ecosystem where the conservation of biodiversity and its sustainable use are brought together.

A Nature Reserve since 1995, the Desertas Islands received the European Diploma for Protected Areas from the Council of Europe, an award that attests to the recovery and protection work in the area over the past few decades.

¹ TM - Trademark

Geographic Profile

The Autonomous Region of Madeira is made up of four main islands (Figure 1), of which only two are inhabited and comprise nearly 98% of the archipelago's territory. Madeira Island has a total area of 740.7 km², Porto Santo Island, 42.5 km², the 3 islets that form the Desertas Islands, 14.2 km² area, and Selvagens Islands with a group of 3 islands and 16 islets, 3.6 km².

The geographical and geological positions make the climate of Madeira Island mild with temperatures ranging between 17° in winter and 25° in summer (Visit Madeira, 2022b), which makes the tourist seasonality in the Region very low (Marujo, 2013).

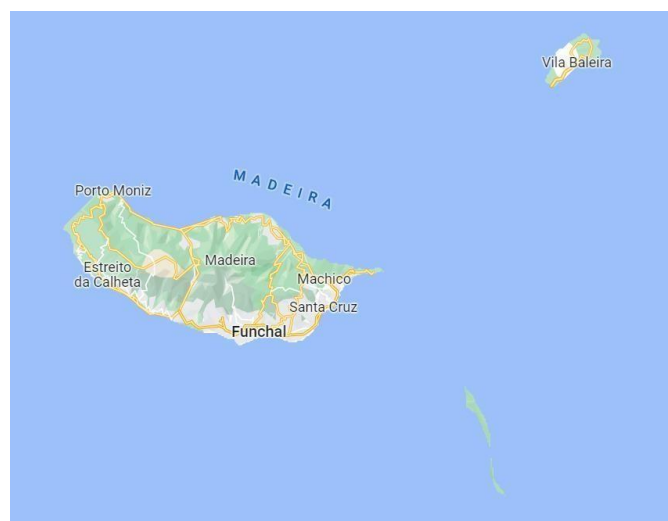


FIGURE 1 - MAP OF AUTONOMOUS REGION OF MADEIRA
SOURCE: GOOGLE MAPS

Regarding the geographical distribution of Madeira's population, the following can be stated: In 2024, about 42% of the population of Madeira lives in Funchal, which has the highest population density in the region, with approximately 1,419 inhabitants/km² (DREM, 2024b). In the same year, 72% of the population lived in the three municipalities of Funchal (42%), Santa Cruz (17%), and Câmara de Lobos (13%) (DREM, 2024b).

Demographic Profile

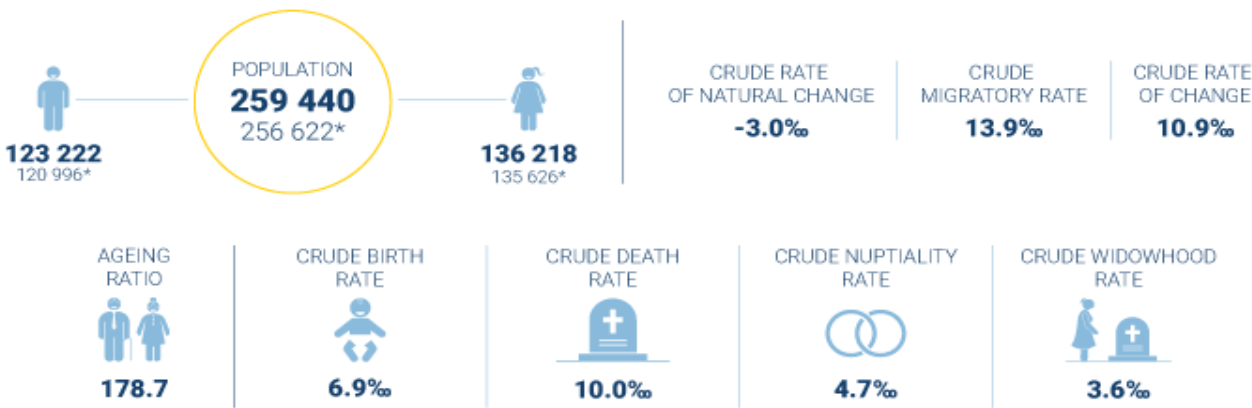
Portugal experienced robust population growth between 2000 and 2010. After 2010, the trend was reversed, marking the beginning of a population decline, both nationally and regionally. However, the demographic landscape has recently shifted again, with the population growth trend being resumed, driven by net migration.

According to the most recent estimates from DREM (2024a), the Autonomous Region of Madeira has an estimated resident population of 259,440. The Crude Rate of Change is a strong 10.9‰, but this growth is entirely sustained by the high Crude Migratory Rate of 13.9‰.

The Region maintains a negative natural balance (-3.0‰), as the Crude Death Rate (10.0‰) significantly exceeds the Crude Birth Rate (6.9‰). This structural issue is reflected in the elevated Ageing Ratio of 178.7, which confirms profound demographic ageing despite the overall population increase driven by migration (Figure 2).

Estimates of Resident Population and Demographic Indicators in the AR of Madeira

2024



* In 2023

FIGURE 2 - ESTIMATES OF RESIDENT POPULATION AND DEMOGRAPHIC INDICATORS (2024)
SOURCE: DREM (2024a)

Macroeconomic Profile²

Accordingly to DREM (2024c), in recent years, the Autonomous Region of Madeira has experienced significant economic growth. In 2022, the region's GDP reached EUR 6,020.5 million, representing a nominal increase of 19.8% and a real growth of 14.2%. Preliminary estimates for 2023 indicate that GDP may rise further to EUR 6,989.6 million, with nominal growth of 11.5% and real growth of 4.5%. This represents a substantial increase compared to the EUR 5,126.4 million recorded in 2019, highlighting a cumulative growth of approximately 36% over four years.

The tertiary sector remains the largest contributor to the regional economy, particularly through trade, transport, accommodation, and food services, which together account for over 35% of the Gross Value Added (GVA)¹. Other important sectors include financial and insurance activities, professional, scientific, and administrative services, and public administration, education, and health, which collectively contribute more than 40% of GVA. In 2023, around 82.9% of the regional workforce was employed in the services sector, confirming the strong dependence of Madeira's economy on tourism and associated activities. *NOTE ON DATA CONSISTENCY: The bar plot on page 11 reflects updated GVA distribution values for 2020–2024, whereas the text on page 10 describes the 2021 sectoral breakdown.*

Overall, the data show that Madeira not only recovered from the economic impact of the COVID-19 pandemic but has entered a period of strong expansion, while gradually diversifying its service-based economy beyond traditional tourism (Figure 3).

¹ *NOTE ON DATA CONSISTENCY: The bar plot on page 11 reflects updated GVA distribution values for 2020–2024, whereas the text on page 10 describes the 2021 sectoral breakdown.*

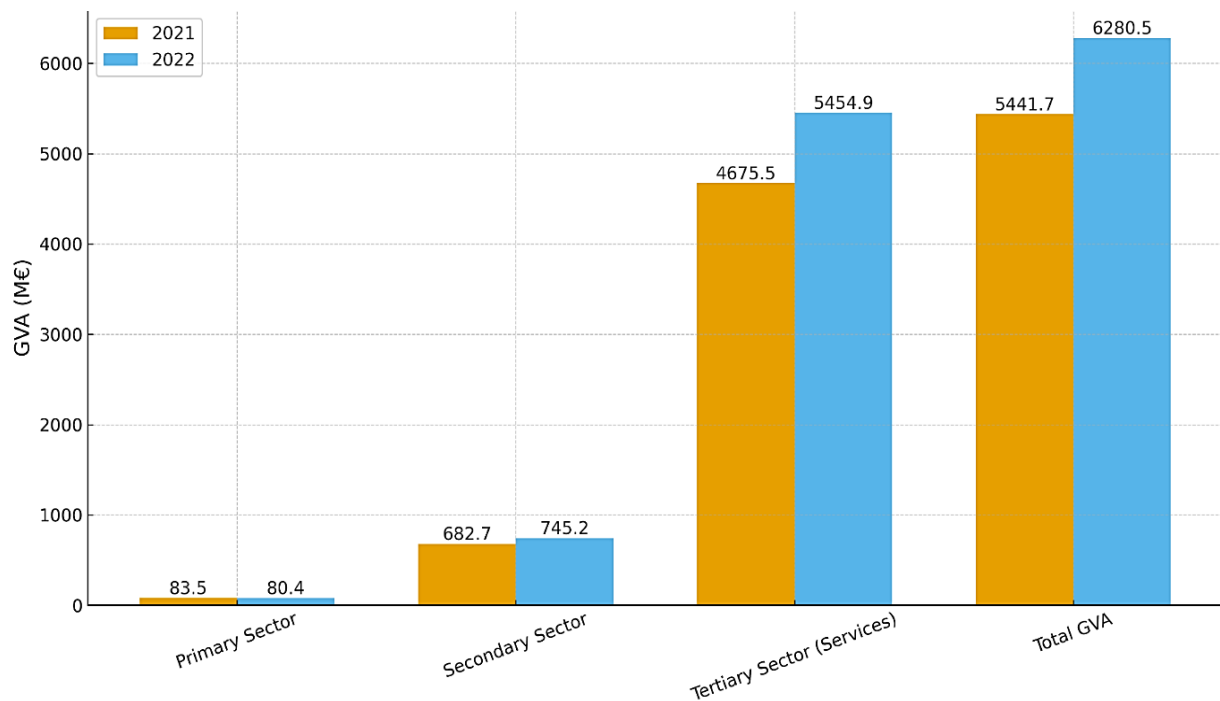


FIGURE 3 - GROSS VALUE ADDED (GVA) BY SECTOR IN MADEIRA, 2021–2022
SOURCE: DREM (2024c)

Up to 2011, GDP per capita in Portugal and in the Autonomous Region of Madeira reached the same level, after which the figures began to diverge, with national values generally remaining higher. In the years that followed, this trend persisted, although the gap fluctuated.

From 2020 onwards (see Figure 4), GDP per capita shows a clear upward trajectory. In 2020, GDP per capita stood at EUR 17.81 thousand, increasing significantly to EUR 20.45 thousand in 2021 and EUR 23.01 thousand in 2022. Growth continued in 2023, reaching EUR 25.66 thousand, and again in 2024, when GDP per capita rose to EUR 27.10 thousand.

This consistent rise between 2020 and 2024 highlights a strong recovery and expansion, with GDP per capita increasing by more than EUR 9 thousand over the five-year period.

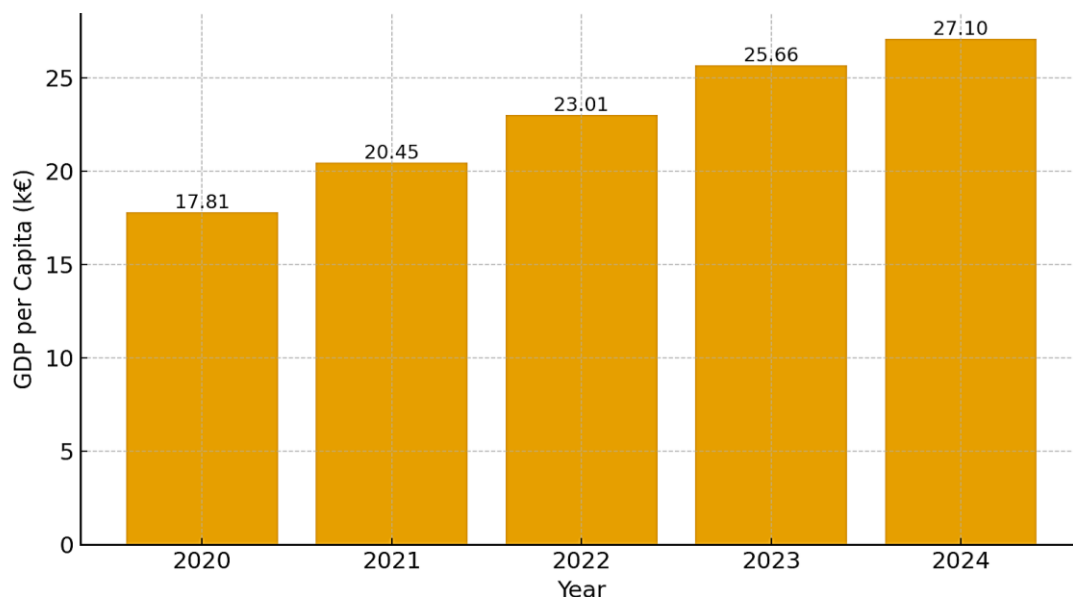


FIGURE 4 - GDP PER CAPITA AT CURRENT PRICES
SOURCE: DREM

Contribution of Tourism to the economy:

At economic level, in 2024, total revenue from tourist accommodation in the Autonomous Region of Madeira (excluding local accommodation with fewer than 10 beds) amounted to EUR 761.1 million, an increase of 16.0% compared with 2023. Moreover, accommodation income (i.e. overnight stays) rose to EUR 540.7 million, up 16.9% year-on-year (DREM, 2025b).

The RevPAR (revenue per available room) for tourist accommodation (excluding local accommodation < 10 beds) reached EUR 83.53, up 13.9% on 2023; in the hotel sector, RevPAR was EUR 89.65 (+14.7%). The ADR (average daily rate) per occupied room was EUR 109.28, a 13.1% increase year-on-year (DREM, 2025b). The average length of stay in 2024 was 4.71 nights (DREM, 2025a), and the annual net bed-occupancy rate (excluding small local accommodation) stood at 66.8%, a rise of 1.4 percentage points from 2023 (DREM, 2025c).

Tourism Demand

In 2024, the number of overnight stays in tourist accommodation (inbound non-resident visitors) reached 11,765,375. The destination's total arrivals (inbound non-resident visitors plus domestic visitors) were 461,380 trips by domestic visitors and 11,765,375 overnight stays by non-resident visitors for the same year. The main source markets for the destination are Portugal, Germany, UK, France and Poland. The peak month for inbound visitors in 2024 was August, accounting for 10% of total annual arrivals (DREM, 2025d).

Lodging Capacity

In 2024, the Autonomous Region of Madeira recorded a total accommodation capacity of 39,408 beds, distributed across hotel establishments, local accommodation with ten or more beds, and tourism in rural areas. In total, there were 492 establishments, with hotels continuing to dominate the regional supply, accounting for 82.3% of total capacity, while local accommodation represented 14.4%, exceeding the share of rural tourism (DREM, 2025d).

Based on DREM (2025b), Tourism in Rural Areas showed further expansion. In 2024, the Region registered an average of 69 establishments in this segment, offering a total of 1,329 beds. Rural tourism represented 3.4% of total bed capacity in 2024.

Transport

There has been a marked increase in air transport, both in passenger numbers and passenger movements to Madeira and Porto Santo. According to DREM (2025a), in 2024, there was a movement of 4,800,000 passengers in Madeira, while a total of 247,900 in Porto Santo.

Based on the same source, the overall volume of seats available on airplanes has been steadily growing over the past few years, reaching more than 3.33 million seats in 2015. This has been accompanied by a growth in airline occupancy rates, reaching 82% for Funchal Airport and 80% for Porto Santo Airport in 2015. While specific 2024 seat numbers are not published, airline occupancy rates reached approximately 87.1% for Funchal Airport and 78.4% for Porto Santo Airport in 2024.

Airport capacity in the Autonomous Region of Madeira is currently not seen as a constraint on tourist development in the region, given that most trips between islands are made by ferry, as measured in passenger numbers.

The number of cruise ship passengers passing through the Port of Funchal has grown significantly, registering approximately 614,731 passengers in 2024 (DREM, 2025a).

Restaurants

In 2019, there were 877 restaurants in the Autonomous Region of Madeira. The number has been growing in the last years despite the pandemic situation experienced, registering a value of 985 restaurants in 2023 (Banco de Portugal, n.d.).

Visitor Profile

In 2024, the Tourism Observatory of Madeira University (OT-UMa), in its joint presentation of the events studied in the Region, observed that 57.6% of the visitors who visited Madeira are female, and that 65% are married or in a civil/domestic partnership. It was also found that the average age was 51.3 years old, thus suggesting an industry that is becoming more geared towards senior tourism (Projeto Turismo, 2025).

In terms of income, the event with the highest net monthly income was the Flower Festival, presenting a figure above the average, at EUR 4,214.93. Average general expenses reached EUR 3,362.54, with visitors spending an average of EUR 424.27 per day and EUR 137.30 per person (Projeto Turismo, 2025).

Competitors

Based on the positioning proposed for the Autonomous Region of Madeira – “Nature paired with Culture” – the following are the region’s direct competitors: Azores, Canary Islands, Balears, Malta, Greece and Croatia.

Tourism Development Strategy

(Official title: Action Plan 2022-2030 for the Sustainability of Madeira Destination)

Based on the principles and guidelines contained in regional and sectoral reference literature, and the changes taking place at regional, national and international level, the Regional Government of Madeira approved the new tourism strategy. The plan was developed by the main stakeholders, to set the foundations needed for the future.

The priorities of the tourism development strategy for Madeira are as follows:

1. **Strengthen destination management, knowledge, and monitoring of the tourism sector** – improving data collection, performance monitoring, and governance.
2. **Diversify, differentiate, and structure the tourist offer** – building a broad, varied, high-quality tourism supply: nature, sea, mountains, culture, wellness, gastronomy, active tourism, etc.
3. **Increase the notoriety and brand recognition of Madeira as a destination** – investing in brand awareness in priority markets, promoting Madeira's unique identity and sustainability credentials.
4. **Attract, qualify and value human resources in the tourism sector** – training, capacity building, ensuring quality, fair and equitable working environments, valorizing local talent.
5. **Promote investment in the tourism sector** – encouraging responsible investment, supporting SMEs, innovation, sustainable infrastructure.
6. **Ensure destination sustainability – environmental, social, cultural, economic** – adopting sustainable practices, preserving natural and cultural heritage, promoting social inclusion, and fostering long-term economic resilience.

The Action Plan sets concrete sustainability targets for 2030 (and intermediary milestones), under the coordination of EarthCheck certification framework. Among the main commitments:

- Achieve 55 % of electricity production from renewable energy by 2030.
- Reduce greenhouse gas (GHG) emissions by 55 % by 2030.
- Reduce fossil fuel consumption by 45 % by 2030.
- Reach a municipal waste recycling rate of 35 % by 2030, and ensure that 35 % of urban waste is reintroduced into the regional economy.
- Reduce gender employment gap to 4 percentage points by 2027.

Additionally, the sustainability strategy emphasises: (i) water and waste management; (ii) ecosystem protection; (iii) land-use planning; (iv) transport and mobility; (v) protection of air, water and light pollution; (vi) cultural heritage preservation; (vii) social inclusion; (viii) fair employment; and (ix) promotion of education, health and resilience.

In the context of the destination's strategic priorities, the vision and mission underlying the positioning of the strategy is based on communicating the essence of the destination in a simple and modern way, the commitment of all stakeholders towards sustainable tourism development, and incorporating universal ethical values based on the principles of the Global Code of Ethics for Tourism.

The Autonomous Region of Madeira presents itself as a territory of natural and cultural diversity, awarded and valued by many. In 1995, the Desertas Islands received the status of Nature Reserve; in 1999, the Laurissilva Forest was recognized by UNESCO as a World Natural Heritage Site; the Municipality of Santana, in 2011, and the Island of Porto Santo, in 2020, received the distinction of UNESCO Biosphere Reserve.

There are also other important challenges to be highlighted, such as raising the awareness of the local community about the importance of sustainability and the need to continue to invest in policies that promote and encourage the production and consumption of local products.

It is in this context of betting on the development of a "So sustainable" destination that this policy arises, a commitment of the Autonomous Region of Madeira to the four pillars of sustainability (Environment, Society, Economy and Culture), within the scope of its certification through the EarthCheck normative standard (Secretaria Regional de Turismo e Cultura, 2022).

Strategic Vision

Madeira aims to be a year-round destination that is safe, easily accessible, cosmopolitan, and blessed with a mild climate and incomparable natural beauty. It is envisioned as a destination of experiential fusion between sea, mountains and culture – recognized in Europe as a “must-visit” place, offering warm hospitality and a rich, diversified palette of travel experiences.

Mission

To enhance Madeira's potential as an outstanding tourist destination by leveraging the authenticity of its natural and cultural supply, genuine hospitality, and high service quality, while ensuring sustainability across environmental, social, cultural and economic dimensions.

The Tourism Observatory



Tourism Observatory

The University of Madeira has approved a new regulation for the Tourism Observatory, in 2015, given the importance of its activity and the need to increase research and training in the area of Tourism in Madeira.

The Tourism Observatory of Madeira University aims to become an aggregator of information on the tourist phenomenon in Madeira, contributing to the sustainable development of the tourism sector.

Regulation

The Regulation mentioned above refers that:

- 1 - The Tourism Observatory's mission is to observe/monitor the tourist phenomenon in the Madeira Autonomous Region, committing to provide relevant information and technical-scientific material on the phenomenon under observation, to relevant entities and society in general.
- 2 - Among the objectives of the Observatory, the following stand out:
 - a) Analyze the regional tourism phenomenon, from an endogenous perspective and, when feasible, from a comparative perspective;
 - b) Carry out information surveys and studies of different types, from a scientific and global perspective of the phenomenon, on:
 - i) The evolution of the market and the variables that characterize it;
 - ii) The socioeconomic typification of the tourist phenomenon in the Madeira Autonomous Region, always understood as a contemporary multidimensional phenomenon, endowed with high complexity, which is important to monitor to better understand.
- 3 - The activity of the Tourism Observatory should be guided by rigor, objectivity, and scientific impartiality.
- 4 - The Tourism Observatory will base its analysis and monitoring work on information published and disseminated by regional, national and international statistical bodies, and on the collection of primary data on topics in the area of tourism.

5 - The Tourism Observatory is headed by a President, who must be a professor or researcher of recognized competence, linked to the University of Madeira, on a full or part-time basis, appointed by the Rector.

6 - The Tourism Observatory should consist of a maximum of ten members, including teachers and internal and external individuals to be invited by the Rector, and technicians appointed by external entities, at the Rector's invitation, linked, namely, to the Regional Tourism Board and Directorate of Statistics, the administrations of Madeira Airports and Ports, the Madeira Promotion Bureau and the Chamber of Commerce Tourism Sector.

7 - In addition to the members that make up the Observatory, it must use the services of other professionals and students to carry out the intended data collection and monitoring activities.

8 - The services referred to in the previous number are contracted by the University of Madeira or by other entities cooperating with the project, to be analyzed on a case-by-case basis, under the terms of the law, using projects or public or private funding.

9- The Tourism Observatory must have its own cost center, for the use of the funds at its disposal, under the responsibility of the President of the Observatory, or of another member of the Observatory to whom he/she delegates this responsibility.

10- The President of the Observatory is responsible for preparing, at the beginning of each year, a report of activities and accounts for the previous year and an activity plan for the current year, to be submitted to the President of the Tourism Project of the University of Madeira and to the Advisory Board. (Universidade da Madeira, 2015).

As procedures, the surveys are delivered to several hotels in the Region, which remain for up to a week after the event, in order to get as many responded surveys as possible, and then they are collected for analysis. The OT-UMa also inquires tourists in the airport, at the boarding gates zone. At the Tourism Observatory, data is processed and analyzed with the SPSS program and Excel and then presented publicly and published in the Observatory's website.

Participatory Processes



Stakeholders

The main stakeholders of the Tourism Observatory are the University of Madeira, Madeira Regional Tourism Board, Regional Directorate of Statistics of Madeira (DREM), ANA Madeira Airport, Associação de Comércio e Indústria do Funchal – Câmara de Comércio e Indústria da Madeira (Chamber of Commerce), Madeira Promotion Bureau, and Madeira Ports. Since 2014 the representatives of the bodies mentioned above were involved in working meetings, where monitoring issues and areas were discussed and decided. The meetings took place at the University of Madeira, in average twice a year (except for the first two years, when there were more meetings and for the pandemic period, when there were none). The group will meet again on a regular basis, in order to achieve the INSTO objectives and seek to acknowledge the new needs of the tourism sector.

The Tourism Observatory will promote a workshop in “Adoption of best practices in sustainable tourism management”. It will also be important to introduce the theme of sustainability requirements to the evaluation of tourism projects and to identify the needs for the preservation of natural areas and historical heritage. This recommendation will be presented to the Regional Authorities for the European funds, which will support tourism projects.

Sector Challenges



Sector Challenges

Madeira is internationally perceived as a developed tourist destination and is known for its beautiful natural environment. This is considered as one of the main potentials for tourism development, together with other types of tourism – cultural, health, eco, sport or rural tourism. Therefore, it is one of the issues that requires attention, in order to maintain both a good experience for the visitor and preserve the natural environment. There is also a concerning issue of the uneven geographical distribution of tourism demand, more specifically to natural environment tourist attractions, which can be overcrowded at some periods. Congestion often reduces visitors' experience, which will determine the level of satisfaction.

There is also an increasing spatial imbalance regarding development between dynamic coastal areas, which are more populated and characterized by intensive levels of land use and consumption, and often declining inland areas in terms of population and economic activity.

On the other hand, the Institute for Forests and Nature Conservation (IFCN) in partnership with the Regional Government aims to protect marine and forest life. These bodies have been monitoring several protected areas, such as the Desertas Islands Natural Reserve, the Laurissilva Forest, the Sítio da Rocha do Navio Natural Reserve, among others. Currently, in addition to observing and extinguishing threats to the Region's nature, the IFCN also maintains several *levadas* and paths throughout the Region, in order to be safe for families to discover the natural and scenic charms that the Region has to offer.

Like many other tourism destinations, challenges associated with the COVID-19 pandemic are front-of-mind for tourist operators, organizations and associations, especially in light of the anticipated need to shift back and forth from recovery to relief over the coming months and years. For government and non-governmental tourism organizations, one of the challenges will be to ensure a future where travel is safe, secure and comfortable/convenient for all travelers, including both residents and visitors.

Chronic challenges facing operators relate to having adequate internal and external transportation linkages. For Madeira, air transportation is a crucial matter, as it is the main gateway to visit the Region.

Another anticipated challenge for the sector is finding and retaining labor. Hence it is important to develop a plan, in order to support the tourism industry's access to a skilled and experienced workforce.

The University of Madeira and several non-governmental organizations provide various training initiatives, such as formal and informal courses. Tourism and Education stakeholders have been engaged in reflecting on the full range of capacity development opportunities available in Madeira, so that gaps in training may be identified.

The defined tourism strategy aims to contribute towards an analysis of the destination's needs and the subsequent implementation of best practices, particularly at the level of natural and historical-cultural resources, while sensitizing the local population and all tourism agents to the needed matching the offer and the market segments that have been targeted, with a view towards their sustainability (DREM, 2025).

In this context, three strategic objectives have been defined, which will support a new cycle for tourism in Madeira marked by the reversal of a downward trend in the typical life cycle of a mature tourist destination:

1. Qualifying and consolidating the supply;
2. Strengthening the destination's reputation and attractiveness;
3. Improving performance indicators for the destination.

Strategic Objective 1

Qualifying and consolidating the supply

- a) Promote innovation and modernization of the tourist supply (products and associated services);
- b) Increase and target training for professionals in the sector;
- c) Increase tourists' satisfaction levels throughout the tourism value chain in Madeira;
- d) Consolidate service quality and Madeira's culture of "welcoming";
- e) Preserve and value the region's natural, historic and cultural heritage;
- f) Regulate the sector as needed.

Strategic Objective 2

Strengthening the destination's reputation and attractiveness

- a) Raise the destination's "Brand Awareness" level;
- b) Boost visitors' intention to visit the destination and increase their level of loyalty;
- c) Boost the attractiveness of the RAM by strengthening and renewing investment in markets and segments that show a propensity for consuming the "Madeira Product".

Strategic Objective 3

Improving performance indicators for the destination

- a) Increase RevPAR;
- b) Increase occupation rate;
- c) Reduce seasonality;
- d) Increase visitors' average daily spending;
- e) Increase flow of visitors.

The strategic objectives have been defined based on the needs of new energy in promoting, publicizing and disseminating information on Madeira's resources and experiences, maximizing the benefits of tourism for all stakeholders, minimizing potentially negative impacts and harmonizing the natural, economic and sociocultural spheres, and adapting the resources and experiences available to markets and target segments.

Monitoring Processes



Monitoring

Tourism Observatory

Since 2016 the Observatory has carried out surveys of general attractiveness of the destination, especially the level of satisfaction with the tourist events, a periodic and systematic monitoring process. These surveys have been carried out yearly and monitor the following events: Carnival, Flower Festival, Atlantic Festival, Wine Festival, Nature Festival, Columbus Festival (in Porto Santo), Christmas and New Year Festivities (see examples in Annexes).

The surveys have been built and discussed between the University of Madeira and Madeira Regional Tourism Board, Regional Directorate of Statistics of Madeira (DREM), ANA Madeira Airport, Associação de Comércio e Indústria do Funchal – Câmara de Comércio e Indústria da Madeira (Chamber of Commerce), Madeira Promotion Bureau, Madeira Ports. These have been the main stakeholders throughout the process.

The stakeholders have also conducted research on sustainable tourism management, environment sustainability or similar areas, both at an academic level with the Centre for Tourism Research, Development and Innovation (CiTUR Madeira) and at a practical level.

Regional Directorate of Statistics of Madeira

The Regional Directorate of Statistics of Madeira (DREM) published the results of the Tourism Satellite Account-2019 for the Autonomous Region of Madeira, in 2022 (CST-M).

The TSA allows for the perception of the economic dimension of this sector, as well as measuring its importance in terms of employment, thus enabling a comparison with other economic sectors in the Region, in the country and internationally (DREM, 2022).

According to CST-M, the Gross Value Added generated by Tourism (GVAGT) reached 16.2% of the GVA of the regional economy, in 2019, amounting to a total of 723.1 million euros.

Tourism Consumption in the Economic Territory (CTTE), which summarizes tourist demand, was around 1,477.4 million euros, representing 28.8% of the Region's Gross Domestic Product (GDP).

These two ratios – the weight of GVAGT on GVA and CTTE on GDP – are the most important results of CST-M. It should be noted that strictly speaking, the weight of tourism in the economy should be measured by the ratio of GVAGT to GVA.

In turn, employment in tourism-related activities, measured in terms of the number of jobs, represented 17.0% of total regional employment.

Destination Management Organization

The DMO (Destination Management Organization), created by the Resolution of the Regional Government Council no. 51/2022, of 31st January 2022, under the dependence of the Regional Secretariat of Tourism and Culture, is the structure responsible for planning, managing and supervising the certification process of Madeira as a Sustainable Tourism (Destination Management Organization, 2022). Destination, based on the criteria of the GSTC (Global Sustainable Tourism Council) and on a set of strategic guidelines of regional, national and international scope, which it undertakes to follow.

The Action Plan constitutes the guiding document for the Region's activities Autonomous Region of Madeira, in the next 8 years, in favor of the Sustainability of the territory, in the environmental, cultural, social and economic dimensions.

The Action Plan also promotes the alignment of its proposals with the Sustainable Development Goals. Considering the reality of the territory, and together with local agents, the destination identified 10 SDGs (5 priorities and 5 relevant) to which it will guide its action, with a view to sustainable development.

It should also be noted that the Autonomous Region of Madeira should improve some indicators: Unemployment Rate, Recycling and Number of tourist companies with accreditations.

In order to achieve the previously established commitments and targets, a set of actions divided into 9 strategic areas were identified, which aim to promote and encourage sustainable development of the destination and that are aligned with the priority SDGs defined for Madeira. These areas are:

1. Energy Efficiency, GHG Emissions and Changes Climate;
2. Air quality protection, noise control and light pollution;
3. Drinking Water and Wastewater Management;
4. Management of Waste and Hazardous Substances;
5. Planning and territorial development;
6. Transport;

7. Management and Conservation of Ecosystems and Biodiversity;
8. Cultural and social management;
9. Economic management.

Key Elements



Key Elements and Indicators

Key elements of sustainable tourism and their monitoring goals are summarized in table 1. Monitoring goals may change over time if deemed necessary by the local working group or others involved in the Tourism Observatory activities and discussions.

INSTO Key Elements	
<i>Governance</i>	Effective leadership and coordination across the tourism sector.
<i>Economic benefits</i>	A thriving tourism economy.
<i>Employment</i>	A diverse, skilled and experienced tourism-sector labor force.
<i>Tourism seasonality</i>	Year-round tourism that maximizes available capacity.
<i>Accessibility</i>	Tourism contributes to accessibility.
Madeira's Key Elements	
<i>Visitor sentiment</i>	Positive visitor sentiments towards Madeira.
<i>Service Quality</i>	Enhance service quality across the entire tourism value chain.

TABLE 1 - INSTO KEY ELEMENTS

Governance

Monitoring goal: Effective leadership and coordination across the tourism sector

Autonomous Region of Madeira requires coordinated approaches and mechanisms to provide balanced, but supportive physical, regulatory, fiscal and social environments. Similarly, coordination between the territorial government and other stakeholders and partners

is fundamental to reaching the vision and goals, while respecting the core values outlined in the strategy.

Governance			
Measure ment Themes	Indicators	Monitored	Responsible Entity
Sustainable Tourism Development	Reference to sustainability principles in the strategy/plan.	Yes	Madeira Regional Tourism Board (MRTB)
	A published document setting out the current destination strategy and action.	Yes	MRTB
	The strategy is clearly visible and available online.	Yes	MRTB
Communications plan	The destination has planning guidelines, regulations and/or policies which control the location and nature of development, require environmental, economic, and socio-cultural impact assessment.	Yes	MRTB

TABLE 2 - GOVERNANCE

Economic Benefits

Monitoring Goal: A thriving tourism economy

The health of the tourism economy has long been interpreted by looking at revenue. It is intended to measure the amount of gross revenue that businesses attribute to tourism and tourism's contributions to the GDP. The average length of stay and visitor spend are two other key indicators that provide insight into revenues. Ensuring financial support for tourism development is another important component of building a thriving tourism economy.

Economic Benefits				
Measurement Themes	Indicators	Monitored	Frequency	Responsible Entity
Tourism Revenue	Per cent GDP attributable to tourism	Yes	Every 3 years	Regional Directorate of Statistics of Madeira (DREM)
	Occupancy rates	Yes	Monthly	DREM
	Average length of stay	Yes	Monthly	DREM
	Visitor spend	Yes	2013/2016	DREM/ Tourism Observatory
	RevPAR	Yes	Monthly	DREM
Tourism development and supports	Financial programs, incentives, and supports for tourism development are in place, align with the goals of the Tourism Strategy, and support outstanding visitor experiences	Yes	Yearly	MRTB

TABLE 3 - ECONOMIC BENEFITS

Employment

Monitoring Goal: A diverse, skilled and experienced tourism-sector labor force

Finding and retaining workers is one of the biggest challenges the Autonomous Region of Madeira tourism industry faces. The Government of the Autonomous Region of Madeira helps organize and fund a variety of training, recruitment and retention initiatives for the tourism sector. The University of Madeira and several non-government organizations also provide training initiatives.

Employment				
Measurement Themes	Indicators	Monitored	Frequency	Responsible Entity
Number and quality of employment	Number of jobs in the tourism industry, average weekly hours worked, average hourly wage (fulltime).	Yes	Every 4 years	DREM – Tourism Satellite Account
	Academic and professional level of tourism sectors	Yes	Yearly	Institute for Qualification

TABLE 4-EMPLOYMENT

Tourism Seasonality

Monitoring Goal: Year-round tourism that maximizes available capacity

To strengthen year-round tourism, support for its development and promotion must be in place. To better understand the variations in tourism, it is important to measure tourist arrival and occupancy rates.

Tourism Seasonality				
Measurement Themes	Indicators	Monitored	Frequency	Responsible Entity
Degree of seasonality and capacity	Tourist arrivals by month or quarter.	Yes	Monthly	DREM
	Occupancy rates per month and in peak quarter.	Yes	Monthly	DREM

TABELA 5-TOURISM SEASONALITY

Accessibility

Monitoring Goal: Tourism contributes to accessibility

The Autonomous Region of Madeira has promoted several actions, in order to facilitate accessible and inclusive attractions, services and public buildings. Businesses and organizations have also made progress in this regard. The opportunities were designed to increase the availability of accessible equipment to businesses and non-government organizations and accessible tourism opportunities for all travelers including aging persons, families and persons with disabilities. Ensuring travelers are able to plan the details of their trip in advance is another important aspect of this key element of sustainable tourism.

Accessibility				
Measurement Themes	Indicators	Monitored	Frequency	Responsible Entity
Accessibility of tourist attractions throughout the destination	Visitor satisfaction with the accessibility of the destination.	Yes	Every 3 years	MRTB/Tourism Observatory
Trip planning resources	Details of accessibility included in visitor information about key sites.	Yes		MRTB visitmadeira.com
	Information on accessibility included in communications about the destination as a whole.	Yes		MRTB visitmadeira.com
	Online trip planning resources.	Yes		MRTB visitmadeira.com

TABLE 6-ACCESSIBILITY

Visitor Sentiment

Monitoring Goal: Positive visitor sentiments towards the Autonomous Region of Madeira

Visitor satisfaction with the Autonomous Region of Madeira as a destination is captured through the Event Satisfaction Survey, since 2016. Determining how to strengthen visitor sentiments could be done by asking visitors how standards, services and experiences could be improved.

Visitor Sentiment				
Measurement Themes	Indicators	Monitored	Frequency	Responsible Entity
Perceptions of the destination	Visitor satisfaction with Madeira as a destination	Yes	Every 3 years	MRTB/ Tourism Observatory
Service and accommodation sector standards	Industry-led service and accommodation sector standards that improve the quality of visitor experiences	Yes	Every 3 years	MRTB/ Tourism Observatory

TABLE 7 - VISITOR SENTIMENT

Service Quality

Monitoring Goal: Enhance service quality across the entire tourism value chain

To strengthen service quality across the entire tourism value chain, it is important to create a system that analyses the performance of tourist establishments. This will impel the companies to achieve better results and, thus, be more competitive.

Service Quality				
Measurement Themes	Indicators	Monitored	Frequency	Responsible Entity
Reinforce Service Quality	Adopt a system for quality management and competitiveness	Yes	Yearly	MRTB
	Create a system to register, qualify and inspect tourist establishments	Yes		MRTB

TABLE 8 - SERVICE QUALITY

Roadmap for Covering All 11 INSTO Mandatory Issue Areas (2026–2029)

Year 1 (2026):

Establish data partnerships for all 11 INSTO mandatory issue areas. Develop standardized data-collection protocols and define baselines for each indicator. Begin capacity-building workshops with local stakeholders and data providers.

Year 2 (2027):

Launch pilot monitoring for all 11 INSTO issue areas. Conduct preliminary data analysis and validate data quality. Adjust methodologies where needed and begin creating dashboards for internal monitoring.

Year 3 (2028):

Full operational monitoring of all 11 issue areas. Publish the first annual sustainability report based on complete INSTO metrics. Integrate all datasets and indicators into the regional DMO digital platform for continuous tracking and stakeholder access.

Year 4 (2029):

Optimize long-term monitoring systems and expand coverage to include optional INSTO indicators. Strengthen stakeholder engagement through public reporting, open data initiatives, and regular feedback loops. Use insights to support strategic policy updates and sustainable destination management decisions.

Conclusion

The Tourism Observatory Sustainable Tourism Framework represents the initial path forward in sustainable tourism monitoring. It is supported, in principle, by several key government and nongovernment tourism organizations in the Autonomous Region of Madeira, including the University of Madeira and Madeira Regional Tourism Board, Regional Directorate of Statistics of Madeira (DREM), ANA Madeira Airport, Associação de Comércio e Indústria do Funchal – Câmara de Comércio e Indústria da Madeira (Chamber of Commerce), Madeira Promotion Bureau, Madeira Ports.

The major objective is the establishment of systematic measurement and monitoring of tourism sustainability in the Autonomous Region of Madeira. Following the conduction of the above-mentioned activities, the Observatory intends to achieve the desired profile and planned activities.

References

- Banco de Portugal. (n.d.). *Quadros do setor*.
<https://bportugal.pt/QS/qsweb/Dashboards>
- Caldeira, S.R. F. (2018). *A importância da Marca Madeira, enquanto factor distintivo deste destino turístico*. [Master's thesis, Universidade Lusófona]. ReCiL – Repositório Científico Lusófona.
https://recil.ensinolusofona.pt/bitstream/10437/9381/1/Sara_disserta%C3%A7%C3%A3o_final.pdf
- Destination Management Organization. (2022). *Plano de Ação 2022-2030 da Sustentabilidade do Destino Madeira*. https://sustainableforall.visitmadeira.com/wp-content/uploads/2022/12/MAD13_00PlanoAcaoSustentabilidade-1.pdf
- DREM. (2022a). *Conta Satélite do Turismo da Região Autónoma da Madeira – 2019*.
<https://estatistica.madeira.gov.pt/download-now/economica/contaseconomicas-pt/contaseconomicas-cst-pt/noticias-counta-satelite-turismo/3721-12-12-2022-em-2019-o-peso-do-consumo-turistico-no-produto-interno-bruto-regional-cresceu-na-regiao-autonoma-da-madeira-face-a-2015.html>
- DREM. (2022b). *Estatísticas do Turismo da Região Autónoma da Madeira. Resultados Definitivos*. <https://estatistica.madeira.gov.pt/download-now/economica/turismo-pt/turismo-publicacoes-pt/send/40-turismo-publicacoes/12479-turismo-2019pdf.html>
- DREM. (n.d.c). *Estatísticas dos Transportes da Região Autónoma da Madeira. Ano 2019*.
<https://estatistica.madeira.gov.pt/download-now/economica/transportes-e-comunicacoes/transportes-pt/transportes-publicacoes-pt/send/39-transportes-publicacoes/12321-transportes-2019850.html>
- DREM. (2022d). *Resultados Definitivos dos CENSOS 2021*.
<https://estatistica.madeira.gov.pt/download-now/social/popcondsoc-pt/popcondsoc-censos-pt/popcondsoc-censos-emfoco-pt/send/47-censos-emfoco/15447-em-foco-censos-2021-resultados-definitivos.html>
- DREM. (2024a). *População residente na Região Autónoma da Madeira aproxima-se novamente dos 260 mil, atingindo o valor mais elevado dos últimos onze anos*.
<https://estatistica.madeira.gov.pt/download-now/economica/administracao-publica/2016-02-17-11-17-09/149-noticias/demografia/5197-18-06-2025-em-2024-a-populacao-residente-na-regiao-autonoma-da-madeira-aproxima-se-novamente-dos-260-mil-atingindo-o-valor-mais-elevado-dos-ultimos-onze-anos.html>
- DREM. (2024b). *População e condições sociais*.

<https://estatistica.madeira.gov.pt/download-now/social/popcondsoc-pt/demografia-pt/demografia-publicacoes-pt/category/36-demografia-publicacoes.html>

DREM. (2024c). *DREM divulga os dados das contas regionais.*

<https://estatistica.madeira.gov.pt/en/drem/cooperacaoestatistica/230-press-release/regional-accounts-press-release/4917-17-12-2024-drem-releases-regional-accounts-data-for-the-period-2021-2023-according-to-the-2021benchmark.html?>

DREM. (2025a). *Passenger movement at the airports of the Autonomous Region of Madeira exceeded 5 million, for the first time.*

<https://estatistica.madeira.gov.pt/en/drem/cooperacaoestatistica/166-press-release/transport-of-passengers-and-goods/4985-29-01-2025-in-2024-the-passenger-movement-at-the-airports-of-the-autonomous-region-of-madeira-exceeded-5-million-for-the-first-time.html?>

DREM. (2025b). *DREM releases the final results of the Tourism Statistics for the year 2024 and updates the respective time series (1976–2024).*

<https://estatistica.madeira.gov.pt/en/drem/cooperacaoestatistica/196-press-release/tourism-press-release/5231-09-07-2025-drem-releases-the-final-results-of-the-tourism-statistics-for-the-year-2024-and-updates-the-respective-time-series-1976-2024.html>

DREM. (2025c). *In 2024, the total revenue in the Region's tourist accommodation sector increased by 15.3%.*

<https://estatistica.madeira.gov.pt/en/download-now/economica/administracao-publica/2016-02-17-11-17-09/196-press-release/tourism-press-release/5019-14-02-2025-in-2024-the-total-revenue-in-the-region-s-tourist-accommodation-sector-increased-by-15-3.html>

DREM. (2025d). *Em Foco: Turismo 2024.*

<https://estatistica.madeira.gov.pt/download-now/economica/turismo-pt/turismo-emfoco-pt/emfoco-turismo-pt/send/46-turismo-emfoco/18901-em-foco-2024.html>

DREM. (2025e). *Action Plan 2022–2030 for the sustainability of the Madeira destination.*

Madeira Promotion Bureau/DMO. https://sustainableforall.visitmadeira.com/wp-content/uploads/2024/02/Plano_de_acao_2022-2030.pdf

Marujo, N. (2013). O Desenvolvimento do Turismo na Ilha da Madeira. *Revista de Investigación en Turismo y Desarrollo Local*, 6(15), 1-16.

<https://dspace.uevora.pt/rdpc/bitstream/10174/9533/1/Artigo%20No%C3%A9mi%20-%20O%20DESENVOLVIMENTO%20DO%20TURISMO%20NA%20ILHA%20DA%20MADEIRA.pdf>

NASA. (2020, July 23). *July 23, 2020 – Clouds around Madeira.*

https://modis.gsfc.nasa.gov/gallery/individual.php?db_date=2020-07-23.

Projeto Turismo (2022). *Observatório do Turismo (Tourism Observatory)*.
https://turismo.uma.pt/?page_id=971.

Secretaria Regional de Turismo e Cultura. (2022). *Madeira's tourism sustainability management Policy*. https://sustainableforall.visitmadeira.com/wp-content/uploads/2022/11/MAD02_00-Sustainability-Policy.pdf.

Secretaria Regional do Turismo e Cultura. (n.d.). *Tourism Strategy for Madeira 2017-2021*.
<https://www.visitmadeira.com/Admin/Public/DWSDownload.aspx?File=Files%2FFiles%2FVisitMadeira%2FEstudos%2FDocumento-Estrategico-do-Turismo-na-Madeira-2017-2021-versao-inglesa.pdf>.

Silva, M. L. (2022, June 28). Alojamento Local | 2020. TravelBI.
<https://travelbi.turismodeportugal.pt/alojamento/alojamento-local-2020/>

TravelBI. (2022). *Oferta no Alojamento Turístico*.
<https://travelbi.turismodeportugal.pt/alojamento/oferta-no-alojamento-turistico/>

Universidade da Madeira. (2015). *Regulamento do Projeto Turismo da UMa*.
<https://testuma.sharepoint.com/sites/reitoria/regulamentos/Forms/AllItems.aspx?id=%2Fsites%2FReitoria%2Fregulamentos%2FRegulamento%20Projeto%20Turismo%2FRegulamento%20projeto%20turismo%2Epdf&parent=%2Fsites%2FReitoria%2Fregulamentos%2FRegulamento%20Projeto%20Turismo&p=true&ga=1>.

Visit Madeira. (2022a). *Scientific and Therapeutic Tourism*. <https://www.visitmadeira.com/en-gb/madeira/history/scientific-and-therapeutic-tourism>.

Visit Madeira. (2022b). *Floresta da Laurissilva – Património da Humanidade*.
<https://www.visitmadeira.com/pt-pt/a-madeira/10-razoes-para-visitar-a-madeira/floresta-da-laurissilva-%E2%80%93-patrimonio-da-humanidade>

Visit Madeira. (2022b). *Madeira*. <https://www.visitmadeira.com/pt-pt/a-madeira/madeira>.

Visit Madeira. (2022c). *Prémio e Distinções*. <https://www.visitmadeira.com/pt-pt/a-madeira/distincoes/premios-e-distincoes>.

Visit Madeira. (2022d). *Primórdios do Turismo*. <https://www.visitmadeira.com/pt-pt/a-madeira/historia/primordios-doturismo>.

Visit Madeira. (2025). *Awards and distinctions*.
<https://www.visitmadeira.com/en/travel-info/awards-and-distinctions/>

Annexes

Annex I: Satisfaction Survey – Madeira Wine Festival (2025)

Source: Tourism Observatory of Madeira University

 Secretaria Regional
de Turismo, Ambiente e Cultura
Direção Regional de Cultura

 UNIVERSIDADE da MADEIRA

 Madeira
Madeira, Têtuos

Satisfaction Survey MADEIRA WINE FESTIVAL 2025

This survey is promoted by the Regional Secretariat for Tourism Environment and Culture through the Tourism Observatory of the University of Madeira and its intended to assess the degree of satisfaction regarding the Madeira Wine Festival.

Participate in this survey (it takes about 6 min) and help us improve and meet the needs and expectations of those who come to visit us. If you prefer, you can choose to scan (QR Code) and complete this survey online.

We guarantee anonymity and data confidentiality.



Demographic data

1. Age

☐ 15 to 24 ☐ 45 to 54
☐ 25 to 34 ☐ 55 to 64
☐ 35 to 44 ☐ 65 or over

2. Gender

☐ M ☐ F

3. Marital Status

☐ Single
☐ Married/Cohabitation
☐ Divorced
☐ Widow(er)

4. Country of Residence

☐ Portugal ☐ France
☐ United Kingdom ☐ Spain
☐ Germany ☐ Other Which? _____

5. Net monthly household income

☐ <500€ ☐ 2501€ - 3500€
☐ 501€ - 1000€ ☐ 3501€ - 5000€
☐ 1001€ - 1500€ ☐ 5001€ - 7500€
☐ 1501€ - 2500€ ☐ > 7500€

6. Academic Qualifications

☐ Elementary education ☐ University degree
☐ Secondary education ☐ Master's / PH.D. degree

Trip Description

7. Is this your first trip to Madeira Island?

☐ Yes ☐ No

8. If NOT - Have you attended the Madeira Wine Festival before?

☐ Yes ☐ No

9. Did you already know about the Madeira Wine Festival?

☐ Yes ☐ No

10. If YES - How were you informed?

☐ Family/Friend's recommendation
☐ Through the Internet
☐ Travel Agency
☐ An article in the Press
☐ Television
☐ Outdoor Advertising
☐ Tourism Fair
☐ Other Which? _____

11. Select your accommodation type:

Hotel ☐ Name of the Accommodation _____
Local Accommodation ☐

12. What was the duration of your stay? _____ nights

13. Who accompanied you on this trip?

☐ Alone
☐ Husband/ wife/ partner
☐ Group (not including yourself). How many? Adults: _____
Children: _____

14. What was your group's total expense during your visit? (including travelling, accommodation and expenses in the island)

☐ <500€ ☐ 2501€ - 3500€
☐ 501€ - 1000€ ☐ 3501€ - 5000€
☐ 1001€ - 1500€ ☐ 5001€ - 7500€
☐ 1501€ - 2500€ ☐ > 7500€

Satisfaction level

15. Overall, how satisfied were you with the Madeira Wine Festival?

Not satisfied > ☐ ☐ ☐ ☐ ☐ ☐ ☐ < Very satisfied

16. Are you considering to recommend this event?

☐ Yes ☐ No

17. What is your overall level of satisfaction regarding the following aspects?
(1 = Not satisfied to 7 = Fully Satisfied)

17.1. European Folklore Week – Municipal Garden Auditorium
(August 24th to 28th)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7

Creativity
Organization
Schedule
Event Promotion / Information

Did you attend? Yes ☐ No ☐

17.2. Madeira Wine Lounge (MWL)
(August 28th to September 14th)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7

Creativity
Organization
Schedule
Event Promotion / Information

Did you attend? Yes ☐ No ☐

17.3. Concerts in the Vineyards
(6th, 7th, 13th, and 14th of September)

1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7

Creativity
Organization
Schedule
Event Promotion / Information

Did you attend? Yes ☐
No ☐

17.4. Live Harvest in Estreito de Câmara de Lobos
(13th September)

1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7

Creativity
Organization
Schedule
Event Promotion / Information

Did you attend? Yes ☐
No ☐

18. Did you participate in other activities related with the Madeira Wine Festival?

☐ Yes ☐ No If YES > Which one and where? _____

19. Which of the following you consider to be the highlight of the Madeira Wine Festival?

European Folklore Week (August 24th to 28th) ☐
Madeira Wine Lounge (MWL) (August 28th to September 14th) ☐
Concerts in the Vineyards (6th, 7th, 13th, and 14th of September) ☐
Live Grape Harvest in Estreito de Câmara de Lobos (13th September) ☐

20. How satisfied are you with your stay in Madeira?

Not satisfied > ☐ ☐ ☐ ☐ ☐ ☐ ☐ < Very satisfied

Motivation

21. Was the Madeira Wine Festival the main
motivation for your visit?

☐ Yes ☐ No

22. What was the main motivation of your visit
to Madeira?

☐ Holiday
☐ Visiting Friends/Relatives
☐ Business
☐ Other Which? _____

23. On a scale of 1 (not significant) to 7 (extremely significant), mark with an "X" the degree of importance of the following motivations, when choosing Madeira destination.

1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7
1	2	3	4	5	6	7

1. Cultural attractions (museums, history and culture)
2. Good price/quality ratio
3. Sun, beach and sea
4. Regional gastronomy
5. Security of destination
6. Quality of accommodation
7. Pleasant weather
8. Quiet/tranquility
9. Opportunity for time with family and friends
10. Participate in a variety of activities
11. Enjoy the natural beauty
12. Learn about different cultures and ways of life
13. Relax and rest
14. Enjoy recreation and entertainment

24. Suggestions/Remarks:

Date: _____

Thank you for your participation!
The Tourism Observatory of Madeira University

Annex II: Satisfaction Survey – Nature Festival (2025)

Source: Tourism Observatory of Madeira University



Secretaria Regional
de Turismo, Ambiente e Cultura
Direção Regional do Turismo



Satisfaction Survey Nature Festival 2025

This survey is promoted by the Regional Secretariat for Tourism Environment and Culture through the Tourism Observatory of the University of Madeira and its intended to assess the degree of satisfaction regarding the Nature Festival.
Participate in this survey (it takes about 6 min) and help us improve and meet the needs and expectations of those who come to visit us. If you prefer, you can choose to scan (QR code) and fill out this questionnaire online.



We guarantee anonymity and data confidentiality.



Demographic data

- | | | |
|--|---|---|
| <p>1. Age</p> <p>☐ 15 to 24
☐ 25 to 34
☐ 35 to 44
☐ 45 to 54
☐ 55 to 64
☐ 65 or over</p> | <p>3. Marital Status</p> <p>☐ Single
☐ Married/cohabitation

☐ Divorced
☐ Widower</p> | <p>5. Net monthly household income</p> <p>☐ <500€
☐ 501€ - 1000€
☐ 1001€ - 1500€
☐ 1501€ - 2500€

☐ 2501€ - 3500€
☐ 3501€ - 5000€
☐ 5001€ - 7500€
☐ > 7500€</p> |
| <p>2. Gender</p> <p>☐ M
☐ F</p> | <p>4. Country of Residence</p> <p>☐ Portugal
☐ United Kingdom
☐ Germany
☐ France
☐ Spain
☐ Other Which? _____</p> | <p>6. Academic qualifications</p> <p>☐ Elementary
☐ Secondary
☐ Bachelor degree
☐ Master's / PhD degree</p> |



Characterisation of the trip

- | | |
|---|---|
| <p>7. Is this your first trip to Madeira Island?</p> <p>☐ Yes ☐ No</p> <p>8. If NOT - Have you attended the Nature Festival before?</p> <p>☐ Yes ☐ No</p> <p>9. Did you already know about the Nature Festival?</p> <p>☐ Yes ☐ No</p> <p>10. If YES > How were you informed?</p> <p>☐ Family/friend's recommendation
☐ Through the Internet
☐ Travel Agency
☐ An article in the Press
☐ Television
☐ Outdoor Advertising
☐ Tourism Fair
☐ Other Which? _____</p> | <p>11. Select your accommodation type:</p> <p>Hotel ☐ Name of the Accommodation _____
Local Accommodation ☐</p> <p>12. What is the duration of your stay? _____ nights</p> <p>13. Who is with you on this trip?</p> <p>☐ Alone
☐ Spouse / partner
☐ Group (not including yourself). How many?
Adults: _____ Children: _____</p> <p>14. What is your group's total expense during your visit?
(Including travelling, accommodation and other expenses made in the island)</p> <p>☐ <500€
☐ 501€ - 1000€
☐ 1001€ - 1500€
☐ 1501€ - 2500€
☐ 2501€ - 3500€
☐ 3501€ - 5000€
☐ 5001€ - 7500€
☐ > 7500€</p> |
|---|---|



Satisfaction level

15. Overall, how satisfied are you with the Nature Festival?
- Not satisfied > ☐ ☐ ☐ ☐ ☐ ☐ ☐ < Very satisfied
16. Are you considering to recommend this event? ☐ Yes ☐ No
17. Did you participate in one or more Nature Festival activities? ☐ Yes ☐ No
18. If YES > In what activities did you participate?
- | | |
|---|--|
| ☐ Echo-Madeira Nature Fest | ☐ Cross Training - Porto Santo |
| ☐ Madeira Whale Festival | ☐ Wanderlust - Quinta Magnólia |
| ☐ Cine Nature - Seixal | ☐ Diving - Funchal |
| ☐ Coaststeering - Caniçal | ☐ Trail Running - Caniçal |
| ☐ Boat Trip - Câmara de Lobos | ☐ Visit to Tico's Vineyards - Porto Moniz |
| ☐ Nautical Activities - Porto Moniz | ☐ Madeira Hiking Meeting - Fonte do Bispo |
| ☐ Canyoning - Ribeira das Calas | ☐ Tastings of Various Regional Products |
| ☐ Island Orienteering Race - Santana | ☐ Musical performances |
| ☐ Hike - Chão da Ribeira | ☐ Others |
| ☐ Silent Yoga - Porto Santo | Which events? _____ |
| ☐ Pilates - Porto Santo | |
19. If NOT > In which of these activities would you like to participate?
- | | |
|---|--|
| ☐ Echo-Madeira Nature Fest | ☐ Cross Training - Porto Santo |
| ☐ Madeira Whale Festival | ☐ Wanderlust - Quinta Magnólia |
| ☐ Cine Nature - Seixal | ☐ Diving - Funchal |
| ☐ Coaststeering - Caniçal | ☐ Trail Running - Caniçal |
| ☐ Boat Trip - Câmara de Lobos | ☐ Visit to Tico's Vineyards - Porto Moniz |
| ☐ Nautical Activities - Porto Moniz | ☐ Madeira Hiking Meeting - Fonte do Bispo |
| ☐ Canyoning - Ribeira das Calas | ☐ Tastings of Various Regional Products |
| ☐ Island Orienteering Race - Santana | ☐ Musical performances |
| ☐ Hike - Chão da Ribeira | ☐ Others |
| ☐ Silent Yoga - Porto Santo | Which events? _____ |
| ☐ Pilates - Porto Santo | |

(Please continue the questionnaire on the back) 1/2

20. How satisfied are you with the participation in the above mentioned activities?

Not satisfied >

1	2	3	4	5	6	7
---	---	---	---	---	---	---

 < Very satisfied

21. How much interested are you to participate on Nature activities?

Not interested >

1	2	3	4	5	6	7
---	---	---	---	---	---	---

 < Very interested

22. What is your level of satisfaction regarding the activities you participated in, with respect to:

Not satisfied >

1	2	3	4	5	6	7
---	---	---	---	---	---	---

 < Very satisfied

Guide
Information provided
Schedules
Used equipments
Other. Which? _____

Did you attend?

Yes ☐
No ☐

23. How satisfied are you with your stay in Madeira?

Not satisfied >

1	2	3	4	5	6	7
---	---	---	---	---	---	---

 < Very satisfied



Motivation

24. Was the Nature Festival your main motivation for this visit to Madeira?

☐ Yes ☐ No

25. What was the main motivation of your visit to Madeira?

☐ Holiday
☐ Visiting Friends/Relatives
☐ Business
☐ Other Which? _____

26. On a scale of 1 (not significant) to 7 (extremely significant), mark with an "X" the degree of importance of the following motivations, when you chose Madeira destination.

1. Cultural attractions (museums, history and culture)
2. Good price/quality ratio
3. Sun, beach and sea
4. Regional gastronomy
5. Security of destination
6. Quality of accommodation
7. Pleasant weather
8. Quiet/tranquility
9. Opportunity for time with family and friends
10. Participate in a variety of activities
11. Enjoy the natural beauty
12. Learn about different cultures and ways of life
13. Relax and rest
14. Enjoy recreation and entertainment

27. Suggestions/Remarks:

Date: _____

Thank you for your participation!
THE TOURISM OBSERVATORY OF MADEIRA UNIVERSITY

