

I. SÃO PAULO: PRESENTATION OF THE DESTINATION



São Paulo is Brazil's largest metropolis and one of the most relevant economic and cultural hubs in the Americas. It is a multifaceted destination, bringing together an intense cultural life (including impressive museums, world-class theaters and cultural centers), globally acclaimed gastronomy, large-scale events and business tourism (MICE), while also preserving a vast green heritage—including urban and natural parks—and a unique natural territory, the Ecotourism Hub, located in the far south of the city.

The city is also an international reference in events and fairs, both leisure and business-oriented, supported by robust infrastructure and internationally recognized venues such as Distrito Anhembi, São Paulo Expo and Expo Center Norte, in addition to the Interlagos Racetrack, home to the São Paulo Formula 1 Grand Prix and major festivals like The Town and Lollapalooza Brasil. Other annual highlights include the São Paulo Biennial, Virada Cultural, Sambadrome Carnival Parades and Street Carnival, the LGBTQIA+ Pride Parade, CCXP, São Paulo Fashion Week, and industry-leading fairs such as Hospitalar, Francal, Couromoda and APAS Show.

When it comes to nature and outdoor life, approximately 28% of the city's territory belongs to the São Paulo Ecotourism Hub, covering the districts of Parelheiros, Marsilac and the region of Ilha do Bororé. This territory contains important water reservoirs (Billings and Guarapiranga), conservation units (Capivari-Monos and Bororé-Colônia EPAs, municipal natural parks and the Curucutu Nucleus of the Serra do Mar State Park), trails such as the 182 km Interparks Trail, and community-based tourism experiences, as well as key cultural heritage areas and Indigenous villages like the Tenondé Porã Indigenous Land.

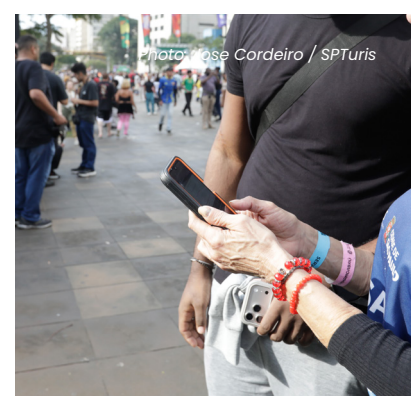
In this way, São Paulo reveals itself in all its grandeur: a plural, dynamic and highly competitive metropolis on the global stage, capable of integrating—as few cities in the world do— the economic strength and cultural vitality of a major urban center with unique leisure, nature and diversity experiences. The city combines world class infrastructure, a multifaceted events agenda that drives business and leisure with great creativity, a gastronomic scene recognized worldwide, and a surprising and still little explored natural heritage that offers authentic experiences within the city limits. By uniting innovation, sustainability, culture, entertainment and hospitality, São Paulo reaffirms its leadership role in tourism in the Americas and consolidates itself as an essential destination—vibrant, welcoming and inexhaustible—for those seeking opportunities, connections and transformative experiences.

II. THE TOURISM AND EVENTS OBSERVATORY (OTE)

Created in 2005 and hosted within São Paulo Turismo (SPTuris), the OTE is the city's research and market intelligence hub. It collects, organizes, analyzes and disseminates data and studies on tourism, culture, entertainment and events to support public policy and sector strategies, in partnership with industry and academia.

The OTE is recognized nationally and internationally. Throughout the 2010s, it received twice the award for Best Tourism Monitoring and was acknowledged by Brazil's Ministry of Tourism as Best Tourism Monitoring Practice. It is part of the INSTO/UN Tourism network and serves as a methodological reference for other observatories across Brazil.

The OTE adopts an open-data policy, making its indicators, historical series, reports and bulletins publicly accessible on its institutional portal, accompanied by interactive visualizations that enhance data usability for management, research, the press and sectoral planning. This practice strengthens evidence-based governance and ensures alignment with UN Tourism's international recommendations for transparency and continuous monitoring.

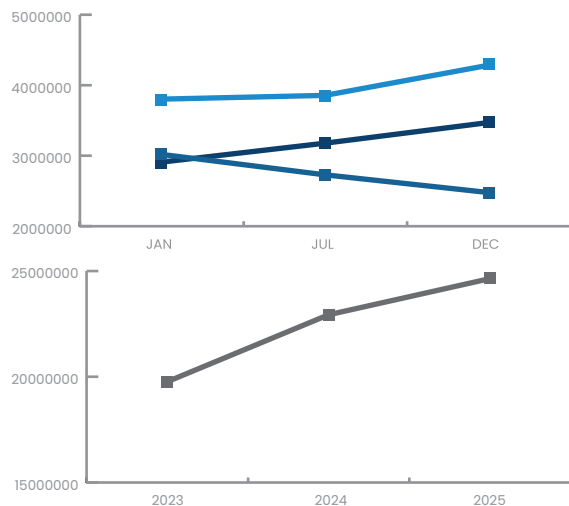


II.A. Monitored indicators

The OTE maintains dashboards and historical series of indicators (ISS – group 13, lodging facilities, airports, bus terminals, business events, employment – CAGED, and IMAT-SP in partnership with Fecomercio-SP), conducts visitor profile and satisfaction surveys at major events, and publishes monthly bulletins with integrated analysis.

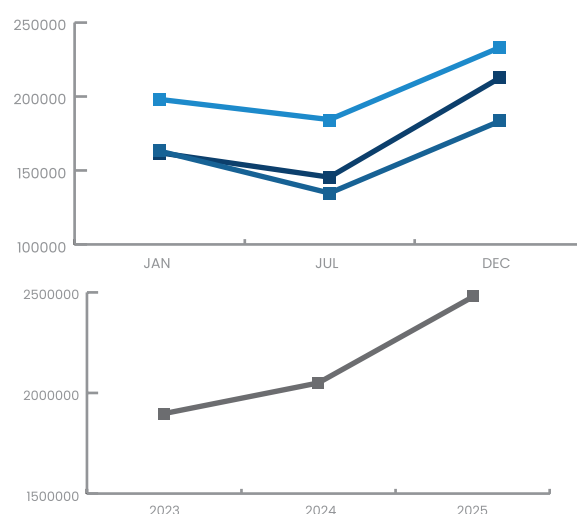
The mini-graphs below present the most recent annual totals (or averages, when the indicator is expressed as a percentage or index), consolidated and published in the reports and bulletins of OTE/SMTur and partners.

Domestic Tourist Flow



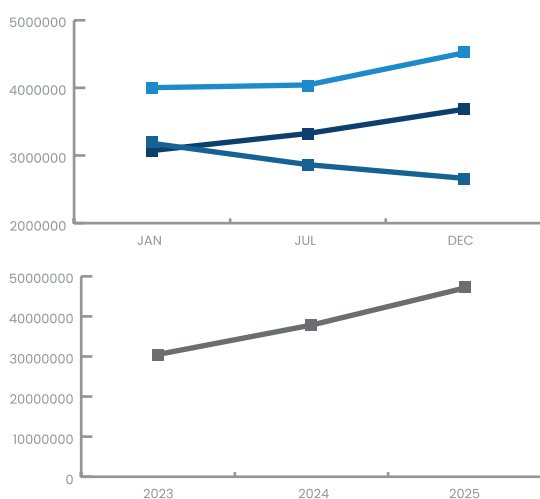
	2023	2024	2025
JAN	3,030,000	2,900,634	3,791,136
JUL	2,730,000	3,178,455	3,846,463
DEC	2,470,000	3,481,114	4,291,565
TOTAL	28,380,000	35,702,420	44,729,002

International Tourist Flow



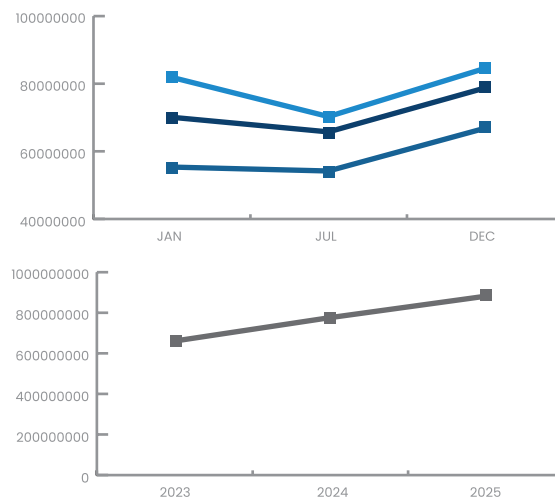
	2023	2024	2025
JAN	163,209	161,774	197,808
JUL	134,388	145,101	183,935
DEC	183,642	212,734	233,313
TOTAL	1,893,758	2,047,422	2,478,480

Tourist Flow Total



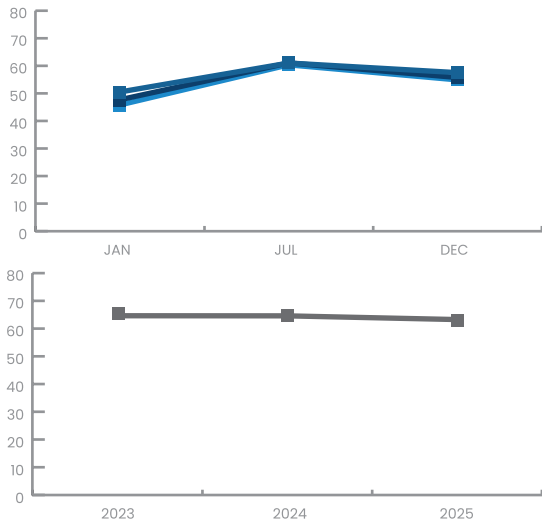
	2023	2024	2025
JAN	3,193,209	3,062,408	3,988,944
JUL	2,864,388	3,323,556	4,030,398
DEZ	2,653,642	3,693,848	4,524,878
TOTAL	30,273,758	37,749,842	47,207,482

ISS - Municipal Service Tax (BRL\$)



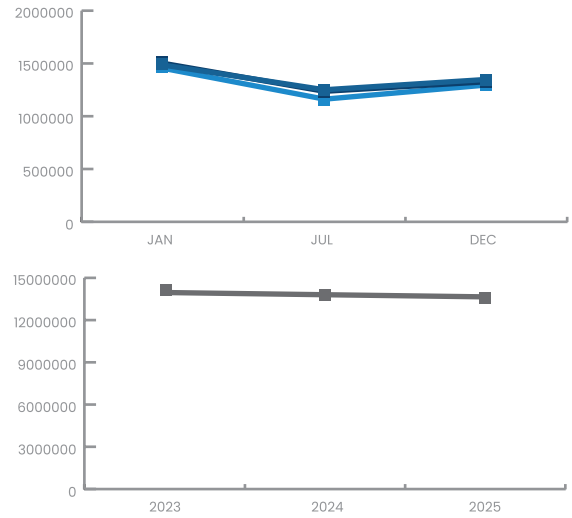
	2023	2024	2025
JAN	55,203,294.26	69,991,627.05	81,976,973.17
JUL	54,002,929.51	65,526,445.82	70,045,703.66
DEC	67,085,109.74	78,960,678.68	84,727,663.56
TOTAL	655,992,746	775,285,074	884,245,592

Hotel Occupancy Rate (%)



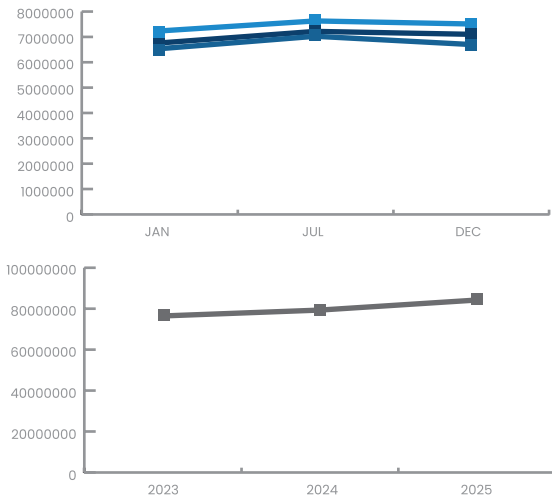
	2023	2024	2025
JAN	50.24	47.42	45.55
JUL	61.19	61.23	60.53
DEC	57.55	55.75	54.90
TOTAL	64.79	64.74	62.96

Bus Terminals – Passenger Flow



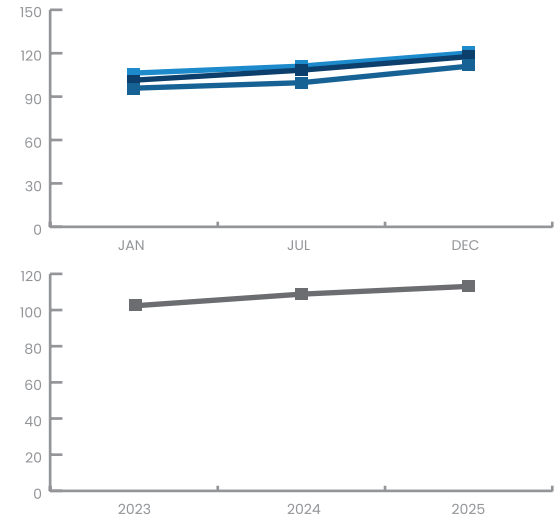
	2023	2024	2025
JAN	1,491,012	1,507,672	1,460,488
JUL	1,242,944	1,228,453	1,154,211
DEC	1,345,995	1,323,358	1,293,876
TOTAL	13,988,482	13,780,342	13,577,746

Air Passenger Traffic – Number of Passengers



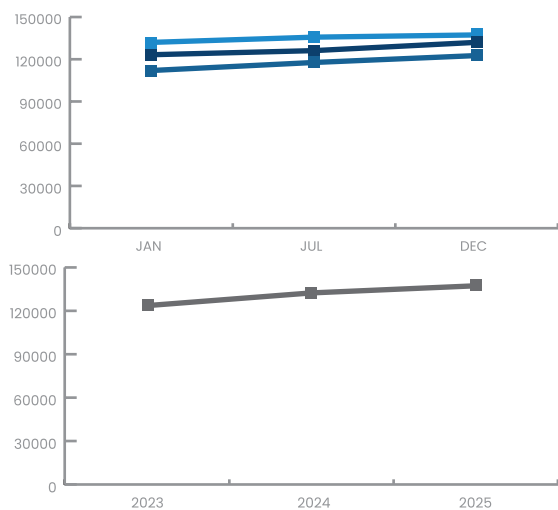
	2023	2024	2025
JAN	6,492,489	6,718,076	7,189,997
JUL	7,044,694	7,237,243	7,647,257
DEC	6,677,423	7,105,331	7,507,411
TOTAL	75,963,907	79,107,359	84,486,259

IMAT



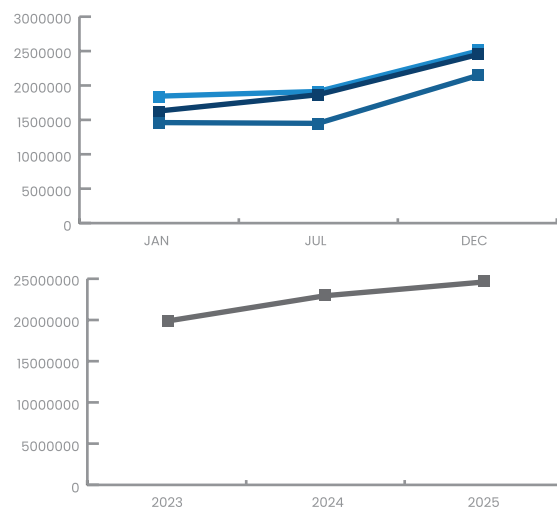
	2023	2024	2025
JAN	95.3	100.8	105.7
JUL	99.3	108.1	110.8
DEC	111.4	118.0	120.5
TOTAL	101.8	108.7	113.3

Employment Stock



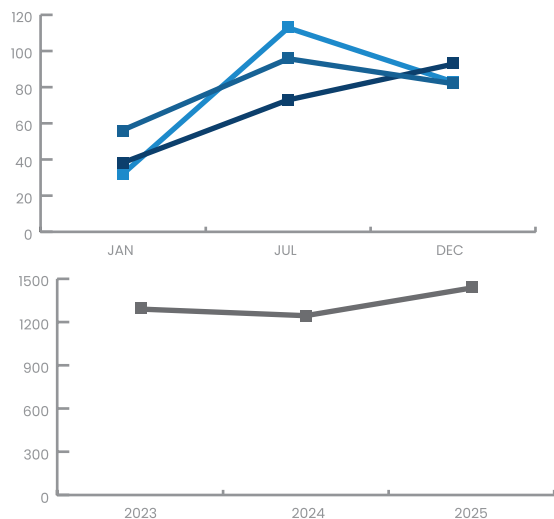
	2023	2024	2025
JAN	111,339	122,515	131,254
JUL	117,596	125,779	135,694
DEC	122,974	132,334	137,589
TOTAL	122,974	132,334	137,589

Tourism Revenue (BRL\$ billion)



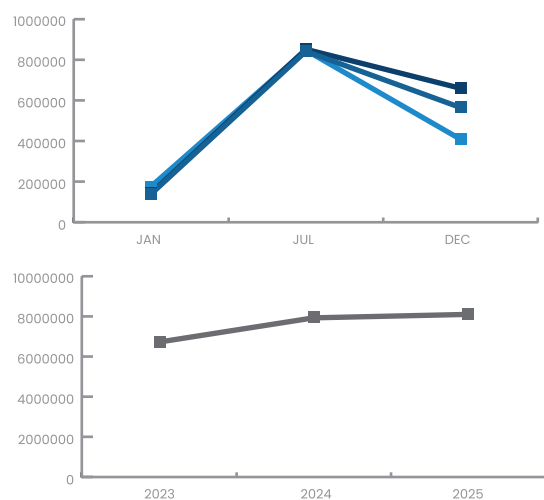
	2023	2024	2025
JAN	1,449,974	1,617,334	1,832,444
JUL	1,438,420	1,859,409	1,902,226
DEZ	2,151,627	2,455,050	2,505,932
TOTAL	19,735,170	22,932,907	24,658,664

Business Events (UBRAFE) – Number of Events



	2023	2024	2025
JAN	56	38	32
JUL	96	73	113
DEZ	82	93	83
TOTAL	1,286	1,238	1,439

Business Events (UBRAFE) – Visitors



	2023	2024	2025
JAN	138,751	142,770	175,690
JUL	844,159	854,160	849,312
DEZ	565,797	660,956	408,595
TOTAL	6,673,092	7,946,601	8,129,078

III. WHY OTE IS PART OF INSTO (UN TOURISM)

The International Network of Sustainable Tourism Observatories (INSTO), led by UN Tourism, brings together observatories committed to monitoring economic, social and environmental impacts of tourism. The 11 mandatory themes include resident satisfaction, economic benefits, employment, seasonality, water and energy management, climate action, waste and wastewater, governance and accessibility.

OTE meets INSTO's standards due to its pioneering work in tourism data, transparency practices, and its ability to advance environmental indicators in an urban context, including monitoring water, energy, waste and visitor flows in the Ecotourism Hub.

IV. OTE AS A STRATEGIC TOOL FOR PUBLIC MANAGEMENT AND TOURISM INFORMATION QUALITY

The OTE serves as a central pillar of tourism governance in São Paulo, providing the evidence base that guides strategic decisions, strengthens cross-sector coordination, and ensures that the city's tourism development advances in alignment with the principles of sustainability, inclusion, and resilience promoted by UN Tourism. Through consolidated methodologies, analytical dashboards, and continuous historical data series, the OTE produces high-quality information that enables the public sector to comprehensively understand visitor behavior, event dynamics, territorial flows, and the economic, social, and cultural impacts associated with tourism activity.

These inputs are fundamental for the integrated planning of major events, supporting actions in mobility, urban logistics, safety, and public services that ensure a positive visitor experience while mitigating pressure on the territory. Thanks to the OTE's detailed diagnostics, the São Paulo City Government improves operations for high-impact events such as Virada Cultural, Carnival, the LGBTQIA+ Pride Parade, and the São Paulo Formula 1 Grand Prix, ensuring that these celebrations take place efficiently, safely, and in alignment with the well-being of local communities. At the same time, its local tourism performance indicators, supported by robust historical series, provide essential input for promotion policies and industry qualification, expanding the city's ability to position itself sustainably and strategically in national and international markets.

In addition, the visitor profile, satisfaction, and impact assessment surveys conducted by the OTE across various events allow for precise measurement of tourism's economic, social, and image-related effects in the city. These results directly contribute to the improvement of public policies and operational models, as well as to more responsible decisions regarding public investment, action prioritization, use of urban space, and protection of cultural and environmental heritage. The knowledge produced reinforces an evidence-based management model capable of promoting transparency, accountability, and alignment with global goals, especially those related to sustainable tourism, efficient governance, and balanced territorial development.

At the same time, the dissemination of OTE's information to society—through reports, interactive dashboards, periodic bulletins, and broad coverage in specialized media—strengthens the culture of open data, enhances public debate, and expands collective understanding of tourism's role in local development. This visibility helps consolidate São

Paulo as a plural, innovative destination committed to sustainable practices, reinforcing the international perception of a city prepared to welcome large tourist flows, foster business, host globally relevant events, and promote authentic experiences related to culture, diversity, and nature.

Through this integrated set of actions, the OTE establishes itself as an essential tool in São Paulo's tourism governance, combining strategic intelligence, participatory management, and continuous monitoring to ensure that tourism development advances responsibly, inclusively, and in alignment with the guidelines of UN Tourism and the Sustainable Development Goals (SDGs)."

The Ecotourism Hub as a Fundamental Agent of Local Sustainability

The São Paulo Ecotourism Hub, which represents about 28% of the municipality's total area and encompasses zones of high socio-environmental sensitivity, plays a structuring role in the city's territorial sustainability strategy. Integrated into the Atlantic Forest biome and home to strategic water sources, conservation units, traditional rural communities and Indigenous villages, the area constitutes a unique territory for implementing nature-based and community-based tourism policies within a metropolitan environment. In this sense, the Hub establishes itself as an essential actor for environmental resilience, cultural appreciation and sustainable socioeconomic development.

Since 2022, the OTE has conducted specialized technical monitoring of tourism dynamics in the territory, structured through comparable metrics and a continuous data system categorized by attraction type: natural parks, leisure areas, agroecological sites, cultural facilities and other enterprises linked to the local tourism offer. These data, consolidated in a dashboard, allow the identification of visitation patterns, seasonality, territorial pressures and operational needs, providing an empirical basis for decisions related to visitor carrying capacity management, infrastructure improvement, enterprise support and preventive impact mitigation. The OTE has also worked continuously to raise awareness among local entrepreneurs about the importance of collecting, consolidating and monitoring data, proposing improvements and expansions to these indicators.

The results of this monitoring support intersectoral actions led by the municipal government, including signage and tourist route development, territorial planning, service provider training, responsible promotion strategies and territorial governance initiatives articulated by the Ecotourism Hub Managing Council (Congetur). This strengthens participatory and multisectoral governance of the territory, in alignment with UN Tourism recommendations for destinations seeking to integrate sustainability, community inclusion and evidence-based policymaking.

With this governance structure supported by continuous indicators, evidence and social participation, the São Paulo Ecotourism Hub is consolidated as a strategic driver of the city's sustainable development, expanding tourism offerings responsibly, strengthening territorial resilience and directly contributing to the municipality's international commitments regarding sustainable destination management and the Sustainable Development Goals (SDGs).

V. ALIGNMENT PLAN FOR THE 11 MANDATORY INSTO THEMES (2026–2027)

1. Resident satisfaction: Apply and expand the Tourism Perception Survey at the district level, with specific analyses for the Ecotourism Hub and areas with a high concentration of events; include a module on visitor–resident coexistence.

2. Economic benefits of the destination: Consolidate the methodology for estimating visitor spending by segment (MICE, leisure, ecotourism) and integrate ISS and employment data.

3. Employment: Improve the Caged dashboard for tourism–characteristic activities (TCA) and develop a sample survey to estimate informal occupations.

4. Seasonality: Integrate accommodation, airport, bus terminal and sample-based attraction counts to model the monthly and weekly distribution of flows across city zones.

5. Energy management: Establish partnerships with utility companies and sector entities to obtain specific consumption series for lodging facilities and event venues; create a pilot indicator for major events.

6. Water management: Coordinate with Sabesp to develop sector-specific methodologies for lodging facilities and event venues in the municipality and in the Ecotourism Hub; pilot measures on water reuse and efficiency.

7. Wastewater: Include in the environmental dashboard data on collection and treatment associated with visitor hubs and major events, with support from Sabesp and SVMA.

8. Solid waste: Create a module with SPRegula to measure waste generation, diversion and recycling in events and tourist corridors; adopt an event-level measurement protocol.

9. Governance: Formalize the data–dialogue–decision–evaluation cycle with Comtur and Congetur, with annual governance reports and quarterly thematic meetings.

10. Climate action: Begin estimating emissions (relevant scopes) associated with events and tourism flows, using a gradual methodology and pilot studies in anchor events.

11. Accessibility: Update the accessibility inventory of attractions and services; create a summary indicator and continuous improvement targets in partnership with SMTur and operators.

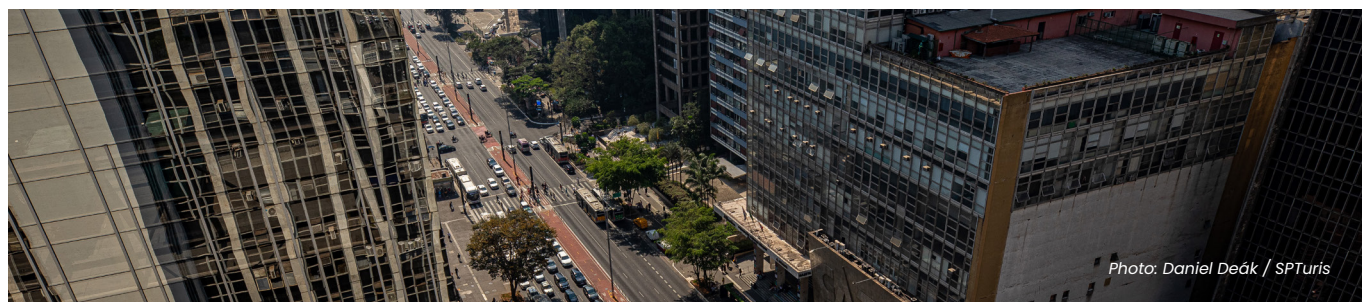


Photo: Daniel Deák / SPTuris

VI. GOVERNANCE, PARTNERSHIPS AND FUNDING

OTE operates with municipal funding and maintains technical independence while partnering with SMTur, Comtur, Fecomercio-SP, Ubrafe, Socicam, airport concessionaires, universities and international networks such as RBOT and INSTO. Environmental agenda priorities include joint efforts with Sabesp, Enel, SPRegula, SMRI and SVMA to ensure sectoral data and shared protocols.



References used

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<https://observatoriodeturismo.com.br/>
- São Paulo Ecotourism Hub (official portal) – <https://polodeecoturismosp.com/>
- INSTO – UN Tourism: network and objectives – <https://www.untourism.int/sustainable-development/un-tourism-international-network-of-sustainable-tourism-observatories>
- OTE page on INSTO – <https://www.untourism.int/observatories/city-of-sao-paulo-brasil>
- Municipal Tourism Secretariat (SMTur) – <https://prefeitura.sp.gov.br/web/turismo/>
- City of São Paulo Government – <https://prefeitura.sp.gov.br>

Appendix – Acronyms and abbreviations

- ACT: Tourism Characteristic Activities (*Atividades Características do Turismo*)
- CAGED: General Register of Employed and Unemployed Persons (*Cadastro Geral de Empregados e Desempregados*)
- CIET: Tourism Economy Intelligence Center (*Centro de Inteligência da Economia do Turismo*)
- COMTUR: Municipal Tourism Council (*Conselho Municipal de Turismo*)
- CONGETUR: Management Council of the São Paulo Ecotourism Hub (*Conselho Gestor do Polo de Ecoturismo de São Paulo*)
- ENEL: (*Ente nazionale per l'energia elettrica*) Electricity Utility
- Fecomercio-SP: Federation of Commerce of Goods, Services and Tourism of the State of São Paulo (*Federação do Comércio de Bens, Serviços e Turismo do Estado de São Paulo*)
- INSTO: International Network of Sustainable Tourism Observatories
- ISS: Service Tax (*Imposto Sobre Serviços*)
- MICE: Meetings, Incentives, Conferences and Exhibitions – Business Tourism and Corporate Events
- RBOT: Brazilian Network of Tourism Observatories (*Rede Brasileira de Observatórios*)
- SABESP: São Paulo State Basic Sanitation Company (*Companhia de Saneamento Básico do Estado de São Paulo*)
- SETUR-SP: São Paulo State Secretariat of Tourism and Travel (*Secretaria de Turismo e Viagens do Estado de São Paulo*)
- SMRI: Municipal Secretariat of International Relations (*Secretaria Municipal de Relações Internacionais*)
- SMTUR: Municipal Secretariat of Tourism (*Secretaria Municipal de Turismo*)
- SOCICAM: Sociedade Civil Campineira
- SP Regula: São Paulo Municipal Public Services Regulatory Agency (*Agência Reguladora de Serviços Públicos do Município de São Paulo*)
- SVMA: Municipal Secretariat for Green Areas and the Environment (*Secretaria Municipal do Verde e do Meio Ambiente*)
- UBRAFE: Brazilian Union of Trade Fairs and Business Events (*União Brasileira de Feiras e Eventos de Negócios*)
- UN Tourism – United Nations specialized agency responsible for the promotion of tourism

Foto: Jose Cordeiro / SPTuris



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