



ANNUAL PROGRESS REPORT 2023 UN TOURISM INSTO

CENTER OF INTELLIGENCE OF TOURISM
ECONOMICS IN STATE OF SÃO PAULO

CITE / SETUR-SP

pesquisa@turismo.sp.gov.br

<https://www.turismo.sp.gov.br/ciet>

GOVERNMENT OF THE STATE OF SÃO PAULO

Tarcísio Gomes de Freitas
Governor of the State of São Paulo

Felício Ramuth
Vice Governor of the State of São Paulo

SÃO PAULO STATE TRAVEL AND TOURISM SECRETARIAT (SETUR-SP)

Roberto de Lucena
State Secretary

Luciane Leite
Executive Secretary

Éder Santos
Chief of Staff

Ana Cristina Clemente
Tourism Coordinator

CENTER OF INTELLIGENCE OF TOURISM ECONOMICS (CITE)

Kelly Kajihara
Consultant - Studies and Research in Tourism and CITE Coordinator
InvestSP/SETUR-SP

Gustavo Grisa
Consultant - Economics
InvestSP/SETUR-SP

Luciana Derze
Consultant - Operational Management and Databases
InvestSP/SETUR-SP

Praça Ramos de Azevedo, 254
5º andar - República
São Paulo - SP - 01037-010
Brazil

ACRONYMS

ABIH (Brazilian Association of the Hotel Industry)

ANAC (National Civil Aviation Agency)

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)

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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 Secretariat of Tourism (SETUR-SP). 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 Agrishow, Barretos Rodeo Festival, Expoflora, and "Dia de Nossa Senhora de Aparecida". 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 coast of São Paulo, with 622 kilometers of extension, has 293 beaches in 16 municipalities which are very popular on weekends and summer vacations, especially among the state's inhabitants. Many of the capital's inhabitants have second homes in 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.

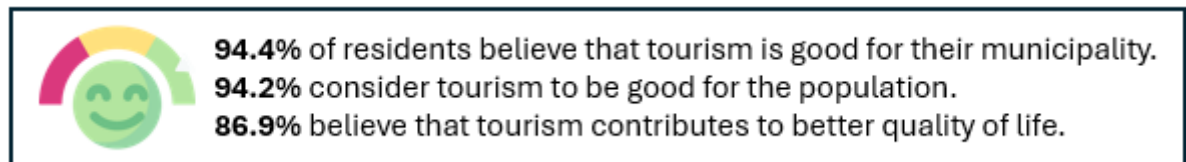
AN OVERVIEW OF TOURISM IN THE STATE OF SÃO PAULO IN 2023

1. LOCAL SATISFACTION WITH TOURISM

Since 2020, CITE has been conducting the Tourism Perception Survey to measure residents' perceptions of tourism in their municipalities, thus becoming a useful tool in assessing the socio-cultural impact of the sector and in shaping future sustainable actions, programs and initiatives in the public sector.

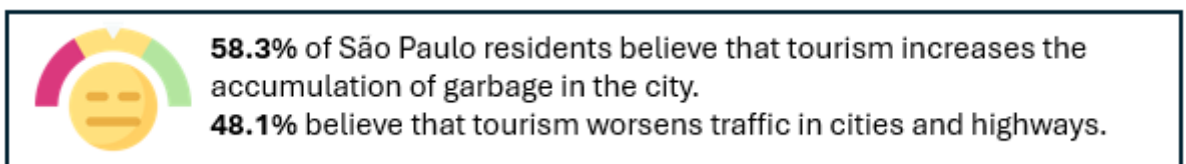
In 2023 the survey obtained responses from 22,902 residents of 325 cities in the state of São Paulo.

The perception that residents of the state of São Paulo have of tourism in their cities is highly positive.



Source: CITE/SETUR-SP

It was also possible to identify what residents consider to be the most negative aspects of tourism in their cities.



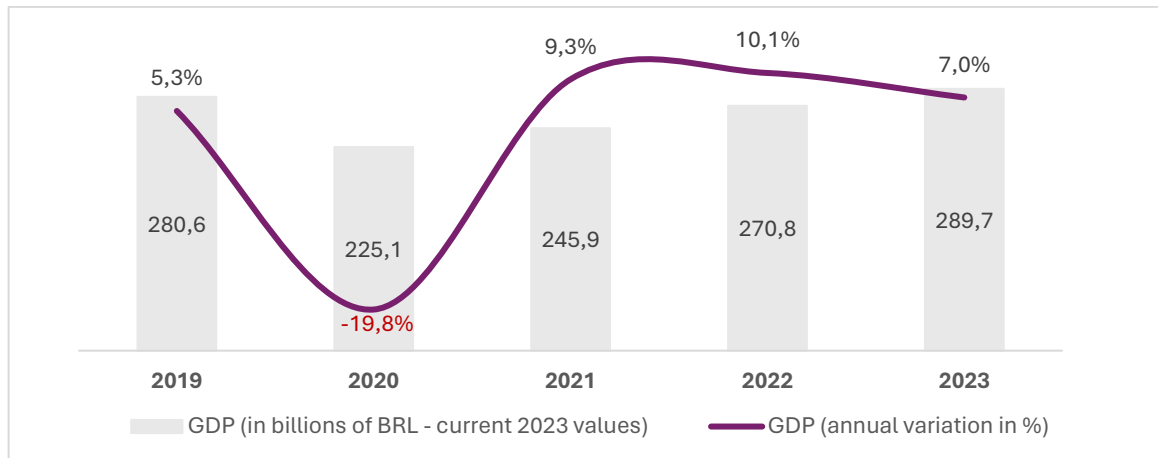
Source: CITE/SETUR-SP

2. ECONOMIC BENEFITS

a. Tourism GDP

The tourism sector in São Paulo recovered from the pandemic scenario and closed the year 2023 with growth of +7.0%, with record transactions of BRL 290 billion.

Evolution of Tourism GDP in the State of São Paulo

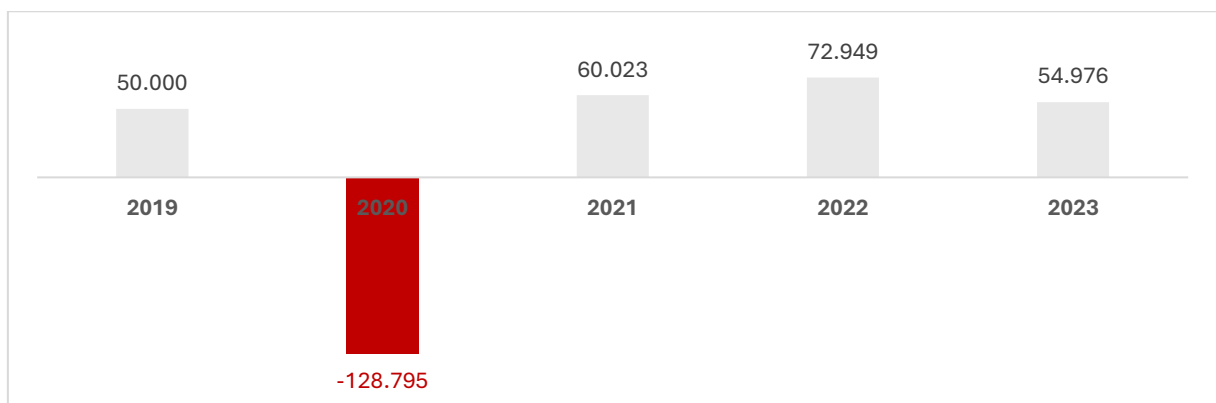


Source: CITE/SETUR-SP

b. Employment

The tourism sector generated approximately 55 thousand new direct formal job positions for the state in 2023. Currently, São Paulo has 887,370 direct formal employee registrations in tourism-related activities monitored, showing a growth of +6.6% compared to 2022.

Balance of direct formal jobs in tourism in the state of São Paulo (nº)



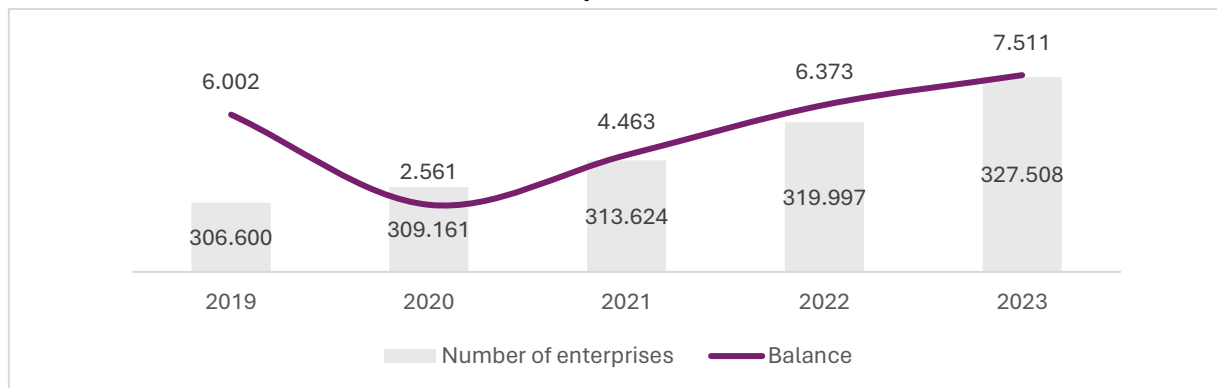
Source: CITE/SETUR-SP

c. Tourism enterprises

The year 2023 ended with the best number of new companies in the sector in the last years, registering a balance of 7,511 new ventures. By December/2023, the state had

327,508 registered and active companies in the tourism sector, representing a growth of +17.8% compared to 2022.

Evolution of Tourism Enterprises in the State of São Paulo

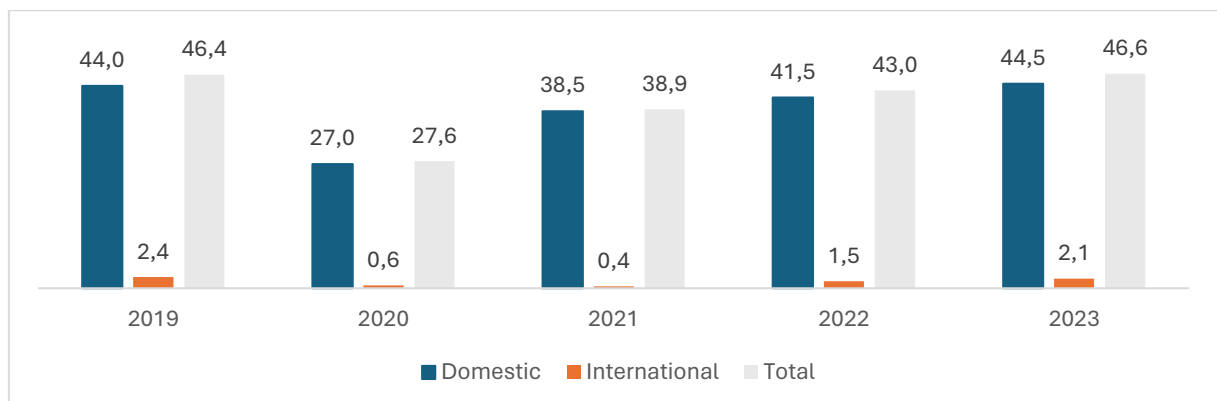


Source: JUCESP (Commercial Registry of the State of São Paulo)

3. TOURISM SEASONALITY

The number of tourists grew by 8% in 2023, reaching 46.6 million YTD. There was a +7% increase in domestic tourism flow in the state, reaching the milestone of 46.6 million tourists for the year. Additionally, the year closed with a record of 2.1 million international tourists in the state in 2023, marking a +40% increase compared to the previous year.

Tourist flow in the state of São Paulo (in millions)

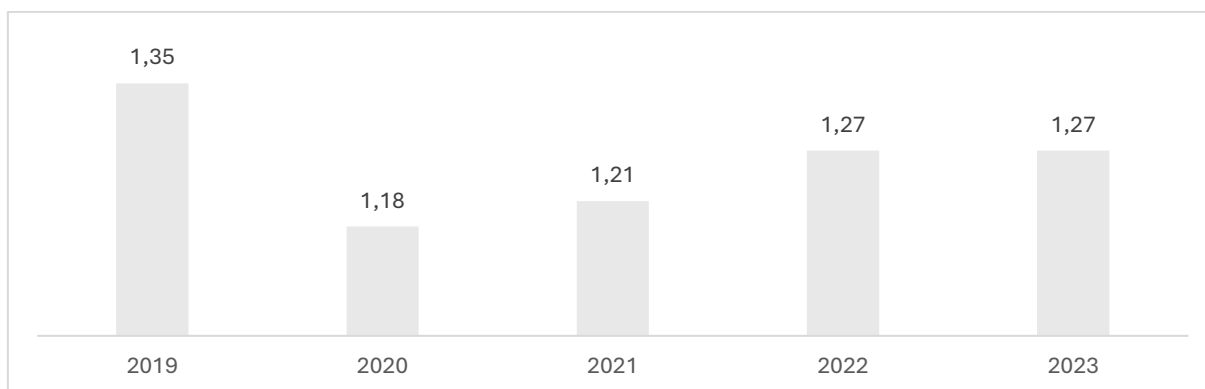


Source: CITE/SETUR-SP

a. São Paulo Roads

Movement on monitored highways remained stable compared to 2022, closing the year with 1.27 billion vehicles circulating on accesses to the monitored cities. There were around 504 million vehicles on weekends alone.

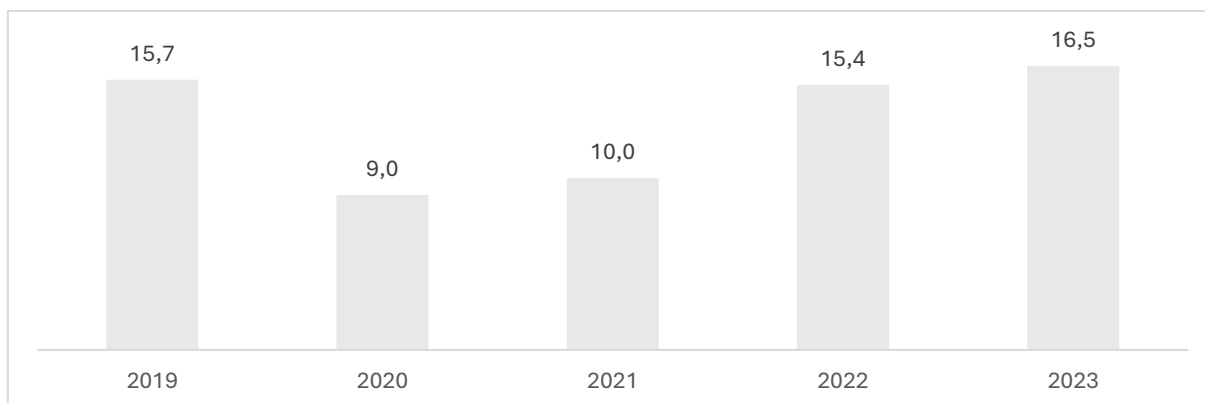
Vehicle movement on monitored highways (in billions)



Source: ARTESP (Transportation Agency of the State of São Paulo)

The four main bus terminals of the state of São Paulo (Tietê, Barra Funda, Jabaquara in the Capital and the Terminal of Campinas) are connected with over 500 cities in the state of São Paulo, Brazil, and South America.

Passenger arrivals at bus terminals (in millions)

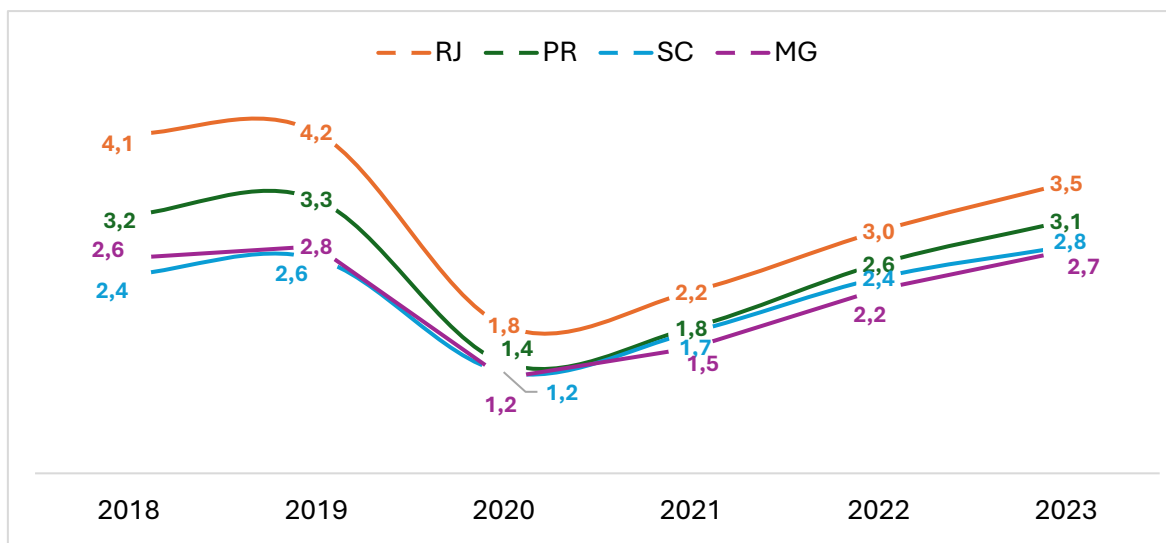


Source: SOCICAM

b. São Paulo Airports

The surrounding states play a significant role as sources of tourists for São Paulo. Historically, Rio de Janeiro leads as the largest emitter of visitors to the state of São Paulo, followed by Paraná, Santa Catarina, and Minas Gerais.

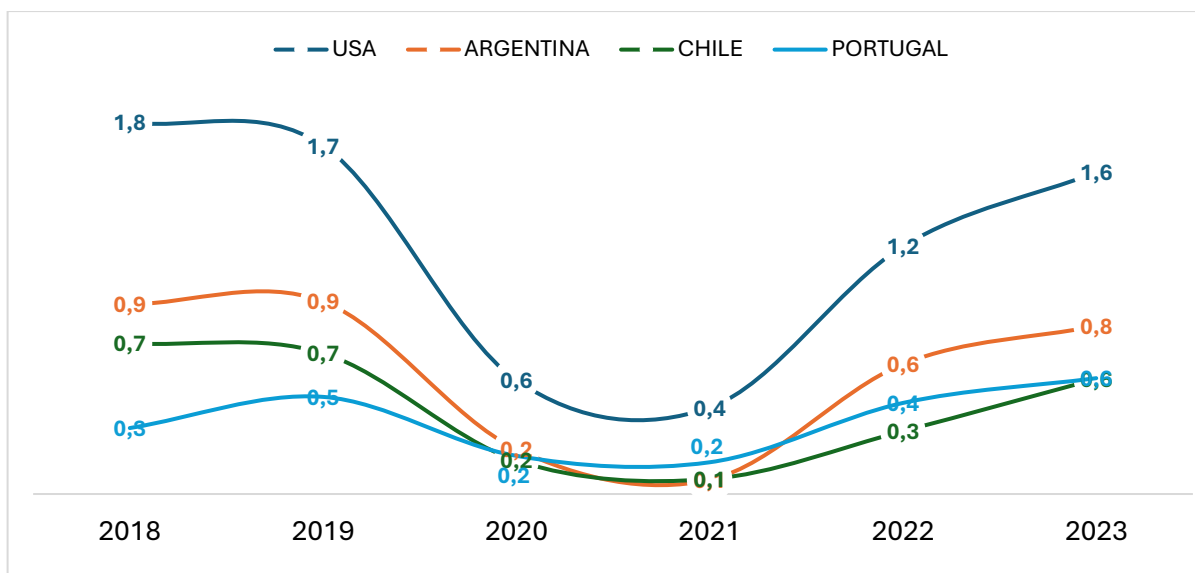
Flow and origin of domestic passengers (in millions)



Source: ANAC

In the international market, the United States leads in the issuance of air passengers to São Paulo airports, closing 2023 with 21.7% of the state's total international flow. Argentina followed, which, after the pandemic, regained its importance in the state's air market.

Flow and origin of international passengers (in millions)

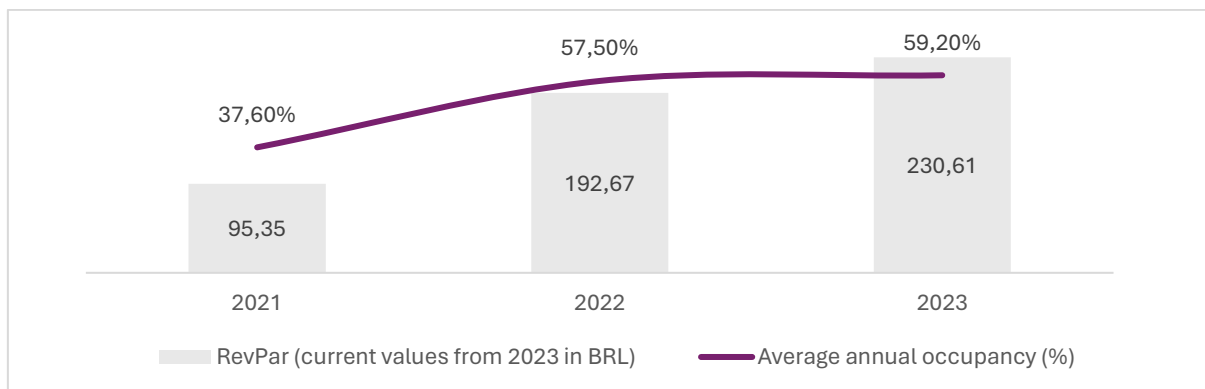


Source: ANAC

c. Hotel occupancy

The state's hotel industry recorded an average occupancy of 59.2% in 2023 and an increase of +19.7% in the revenue per available room (RevPAR).

Evolution of Hotel Performance in the State of São Paulo



Source: ABIH (Brazilian Association of the Hotel Industry)

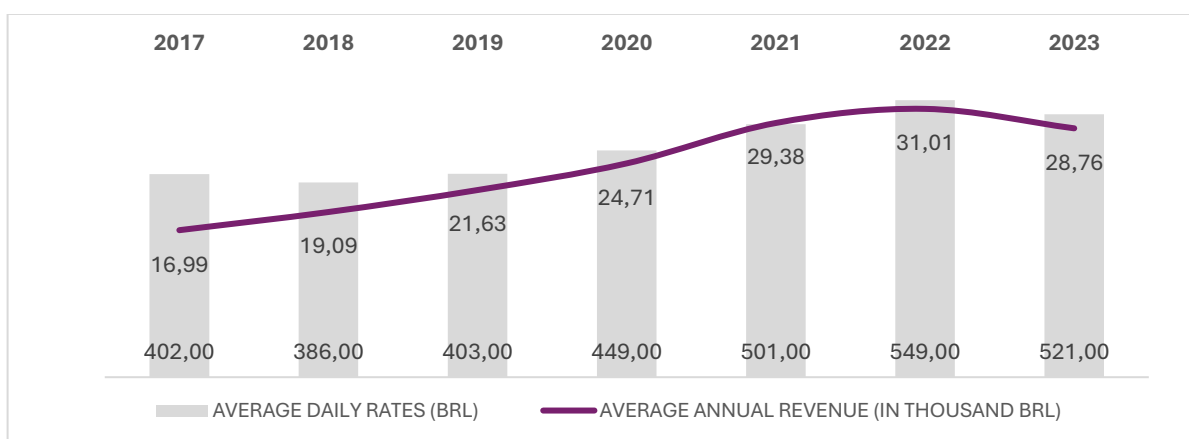
d. Vacation rentals

Through Airbnb data analyses, Seazone identified that São Paulo was the state with the highest revenue from vacation rentals, accumulating BRL 4.1 billion. Additionally, it is the state with the highest number of properties on the Airbnb platform, totaling 201,991 properties available for rent in 2023.

According to Seazone, the average occupancy rate for vacation rentals in the state of São Paulo was 41.6% in 2023.

The average daily rate in São Paulo shows growth from BRL 402 in 2017 to BRL 521 in 2023. The average annual revenue was BRL 28,800, representing a 15.2% increase compared to 2022.

Evolution of vacation rentals in the State of São Paulo



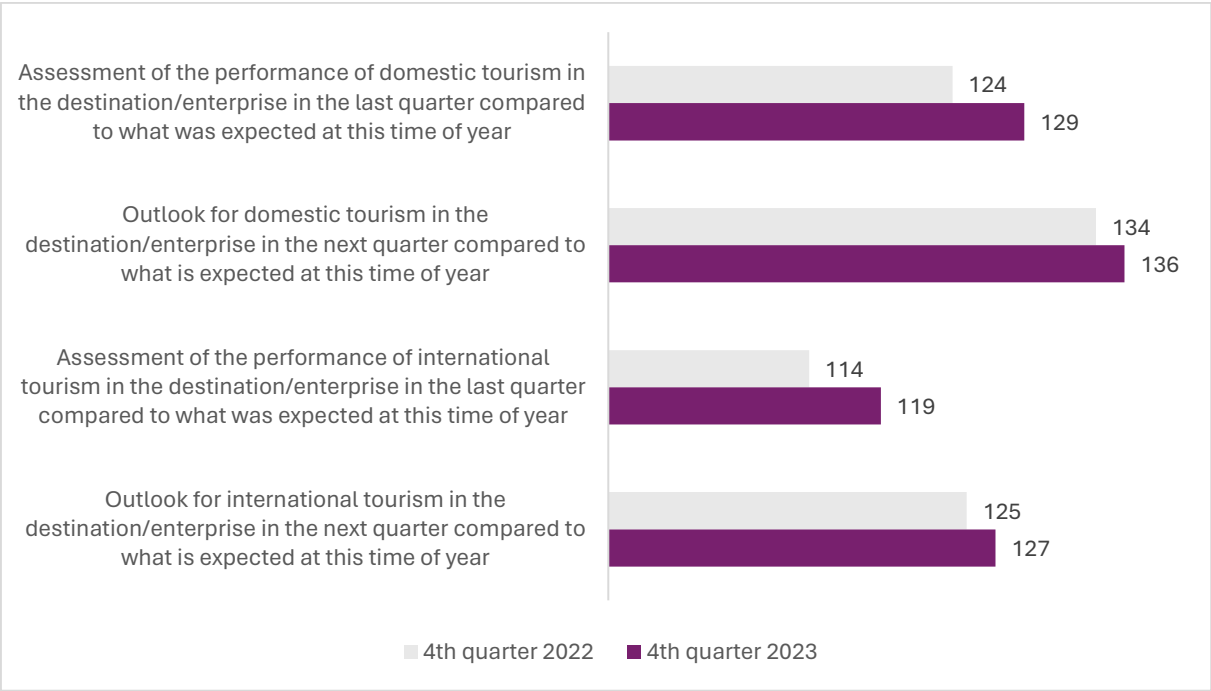
Source: Airbnb / Seazone

4. TOURISM SPECIALIZED MARKET'S PERCEPTION

CITE conducts quarterly surveys with 14 tourism-related sectors and municipalities to assess the market in the previous quarter and expectations for the following quarter. The survey is carried out based on UN Tourism's Tourism Confidence Index (where a value

below 100 indicates a negative performance or expectation, while a value above 100 represents an improvement) and the survey has, on average, 420 responses per quarter. The specialized markets' perception of the tourism sector also ended 2023 with a positive assessment and good expectations for 2024.

General view of responses



Source: CITE/SETUR-SP

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

Since the state of São Paulo has 210 official tourist municipalities, from a total of 645 cities, and 164 cities located in tourist regions, CITE decided to monitor tourism through eight 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:

- Flow of tourists: 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 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 is 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 Travel and Tourism State Secretariat, aims to support all 210 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.

OBTAINING DATA FOR THE CONSTRUCTION OF CITE'S INDICATORS IN 2023

1. TRADITIONAL SURVEYS

Residents' perception of tourism: an annual online survey among the inhabitants of the state of São Paulo about their perception of tourism in their cities and regions and what their expectations are for tourism growth in the coming years. The Tourism Perception Survey (2023-2024) was carried out by CITE, with the support of the municipalities of the state of São Paulo. The online form, containing 6 profile questions and 26 opinion questions about the impacts of tourism on the population, in a multiple-choice format, was answered by inhabitants of São Paulo municipalities, accounting for a total of 22,902 valid forms answered in 325 municipalities. The survey takes place for the fourth consecutive year and provides a solid basis for state and municipal Tourism Managers to measure and monitor local satisfaction with tourism and residents' perceptions of the sociocultural, environmental, and economic impacts of tourist activity, to ensure that the sustainable growth of tourism in the state of São Paulo is aligned with the values of its population.

Results: <https://www.turismo.sp.gov.br/pesquisa-de-percepcao-do-turismo-2023-2024>

Tourism specialized market's perception: a quarterly survey among municipalities and specialized markets through an online questionnaire that assesses the performance of tourism in their regions or enterprises in the previous three-month period and expectations for the following three months, about what is normally expected for this time of year, both for domestic tourism and for international tourism. This survey has the UNWTO World Tourism Barometer as a model.

Results: <https://www.turismo.sp.gov.br/categoria/399>

Profile and satisfaction of events: surveys at the most important events and trade fairs in the state of São Paulo. In 2023, CITE realized visitor profile research among the public at:

- Agrishow 2023 - Ribeirão Preto (<https://www.turismo.sp.gov.br/pesquisa-de-perfil-de-publico-da-agrishow-2023>)
- Barretos Rodeo Festival 2023 –Barretos (<https://www.turismo.sp.gov.br/pesquisa-de-perfil-de-publico-na-festa-do-peao-de-barretos-2023>)
- “Festa da Uva” 2023 – Jundiaí (<https://www.turismo.sp.gov.br/38-festa-da-uva-de-jundiai-pesquisa-junto-ao-publico>)

2. SECONDARY SOURCES

Air transport market indicators: monthly movement of passengers and aircraft at the three largest airports in the state (GRU, VCP, CGH) and at six regional airports serving the monitored regions. Source: National Civil Aviation Agency (ANAC).

Dashboard: <https://www.turismo.sp.gov.br/indicadores-de-desempenho-aeroportos>

Vehicle flow: monthly monitoring of 124 Automatic Traffic Sensors (SATs) close to the monitored destinations. Source: São Paulo State Transport Agency (ARTESP).

Dashboard: <https://www.turismo.sp.gov.br/indicadores-de-desempenho-fluxo-de-veiculos>

Bus terminals passengers: monthly monitoring of arrivals and departures at bus terminals in the Capital (Barra Funda, Jabaquara, Tietê) and Campinas. Source: SOCICAM.

Dashboard: <https://www.turismo.sp.gov.br/indicadores-de-desempenho-terminais-rodoviaros>

Employment: the balance of jobs in tourism in cities is compiled from the Ministry of Labor's General Register of Employed and Unemployed Persons (CAGED) website, which provides data monthly. CITE analyzes data on admission, dismissal, and balance of direct formal employment in nine sectors: accommodation, food, event organization, travel agencies and operators, car rental, cultural and leisure activities, tourist trains and cable cars, air and road passenger transport and passenger waterway. The data on the occupied population comes from the Brazilian Institute of Geography and Statistics (IBGE) from 2021 when the most recent survey was conducted. Source: Ministry of Labor (Novo CAGED/MT).

Dashboard: <https://www.turismo.sp.gov.br/indicadores-de-desempenho-empregos-e-empresas-do-setor>

Constitutions and Write-offs of Companies: monthly data on the opening and closing of companies in the tourism production chain. Source: Board of Trade of the State of São Paulo (JUCESP).

Dashboard: <https://www.turismo.sp.gov.br/indicadores-de-desempenho-empregos-e-empresas-do-setor>

Monthly service survey (PMA): monthly indicators that allow monitoring of the conjunctural behavior of the services sector, investigating the gross revenue from services in formally constituted companies. Source: Brazilian Institute of Geography and Statistics (IBGE).

Dashboard: <https://www.turismo.sp.gov.br/indicadores-de-desempenho-atividades-e-receita-turistica>

Accommodation sector: the figures for the accommodation sector in the state of São Paulo are collected monthly by the Brazilian Association of the Hotel Industry in São Paulo (ABIH-SP) and sent to CITE in a spreadsheet and report format. The survey developed with ABIH-SP members who inform the value of the average tariff and average occupancy for the month so that the Revenue per Available Room (RevPAR) can be calculated.

Dashboard: <https://www.turismo.sp.gov.br/indicadores-de-desempenho-hospedagem-1>

Sustainable development index: the IDSC-SP (Sustainable Development Index of the Cities of the State of São Paulo) provides a comprehensive and integrated overview of the cities in the state of São Paulo in relation to each of the 17 Sustainable Development Goals (SDGs). It is a tool designed to promote the fulfillment of the United Nations (UN) 2030 Agenda for Sustainable Development and offers cities an opportunity to align with the most advanced global agenda for sustainable development. The most recent data released by the NGO Sustainable Cities Institute, with the support of the Government of the State of São Paulo, concerning the Sustainable Development Goals of the cities in the state, pertains to the year 2020.

Site: <https://idsc-sp.cidadessustentaveis.org.br/>

Electricity management: electricity consumption in cities (residential + commercial) in a month-by-month view compared to the volume of cars in the city or region. Source: companies licensed to supply electricity in the monitored cities. Sources: CPFL for Brotas, Campinas, Olímpia, Ribeirão Preto, Santos, NEOENERGIA for Campos do Jordão, Eldorado, Ilhabela and EDP for Aparecida.

Water and sewage management: water consumption in the cities (residential + commercial) on a month-by-month view compared to the volume of cars in the city or region, as well as the volume of sewage collected in the year and the proportion of this sewage that is treated. Source: concession companies for water and sewage services in the monitored cities. Sources: DAEMO for Olímpia, SAAE for Aparecida and Brotas, SABESP for Campos do Jordão, Eldorado, Ilhabela and Santos, SAERP for Ribeirão Preto and SANASA for Campinas.

Solid waste management: volume of solid waste produced and collected annually in monitored cities and the annual quality index of waste landfills. Source: Environmental Company of the State of São Paulo (CETESB).

Dashboard: <https://www.turismo.sp.gov.br/indicadores-de-desempenho-indice-de-qualidade-dos-aterros-de-residuos>

3. GOVERNANCE: MUNICIPAL TRAINING

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.

The trainings offered by CITE to municipalities in the state of São Paulo in 2023 were on the following topics:

- Construction of polls and training of field researchers – the training took place on demand in ten cities throughout the year.



- Workshop accomplished by CITE on the importance of local tourism observatories - the workshop took place at the request of the city of Santos for all the cities in the region.



REPORT ON THE NINE KEY CITIES IN 2023

1. APARECIDA

The main religious tourism destination in Brazil is the city of Aparecida, named after Our Lady Conceição Aparecida, the patron saint of Brazil. According to IBGE (2020), the estimated population is 36,185 people and the destination receives more than 15 million visitors per year, especially on October 12th, a national holiday and the patron saint's day. Located in the Metropolitan Region of the “Vale do Paraíba” and the main location of the Faith Circuit, Aparecida is 169 km away from the Capital, and its biggest attraction is the National Sanctuary, which is the largest Marian sanctuary, the second largest basilica and one of the five most visited religious spots in the world.

(Source: Travel and Tourism Secretariat of the State of São Paulo)



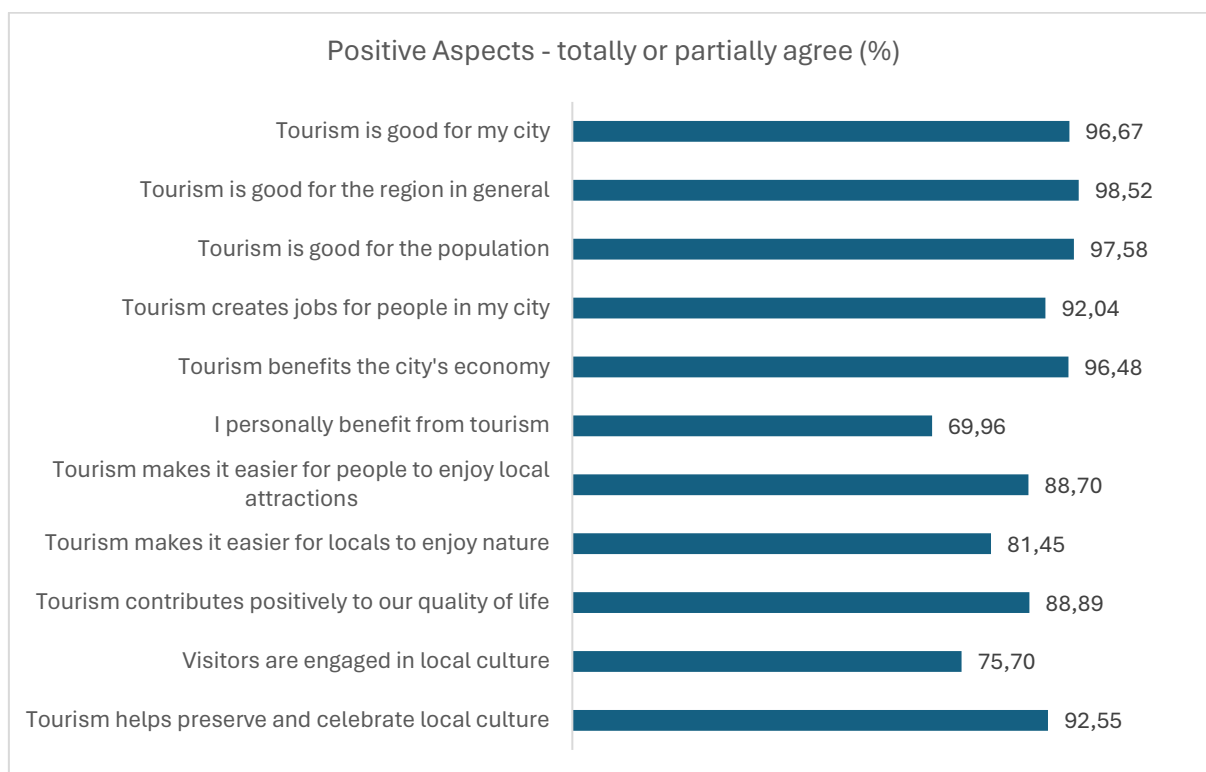
Basilica de N. S. Aparecida – photo by Ken Chu

1.1 LOCAL SATISFACTION WITH TOURISM

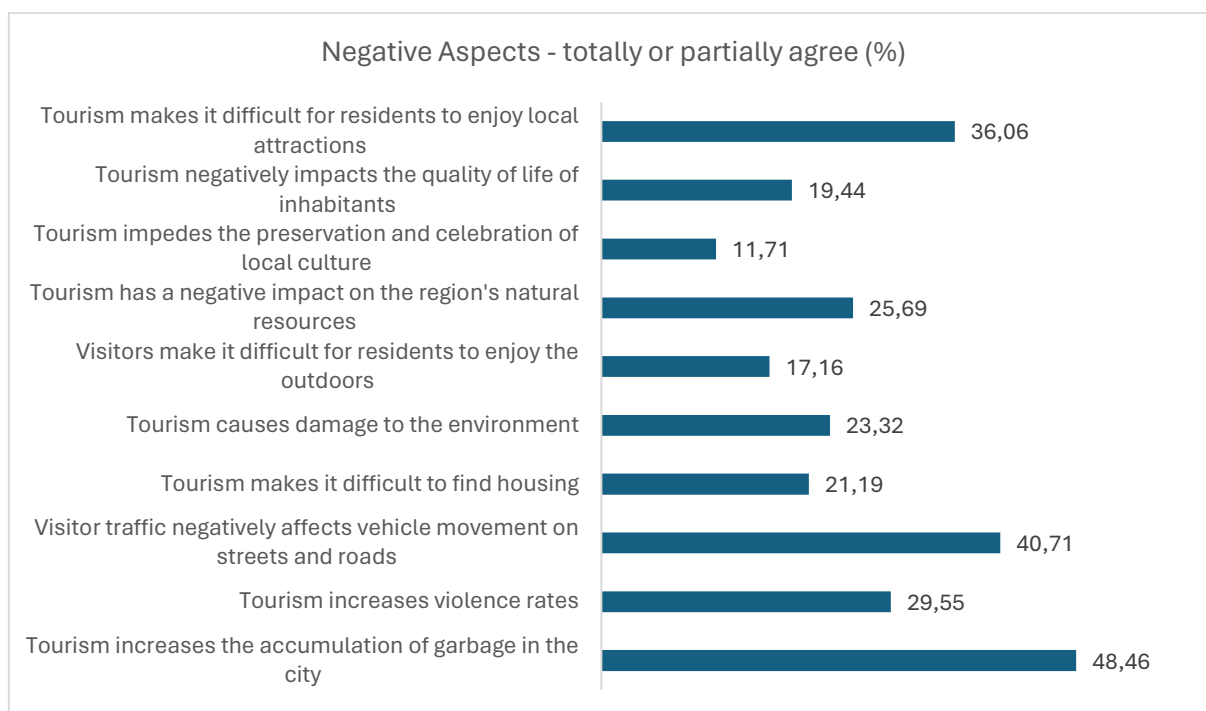
Aparecida was unable to obtain a minimum sample for the 2023 perception survey (44 of 200), but the 11 cities in the Faith Tourist Region managed a sample of 540 responses and CITE chose to consider the regional result.

The great majority of the population of Aparecida considers tourism as beneficial for the city and the population, creating jobs and improving the economy. They also believe that tourism preserves and celebrates local culture. Of all the monitored cities, Aparecida,

together with Ribeirão Preto, are the ones with the best perception of the impacts of tourism, with a high proportion of the population agreeing to almost all the positive aspects and a low proportion agreeing to the negative aspects.

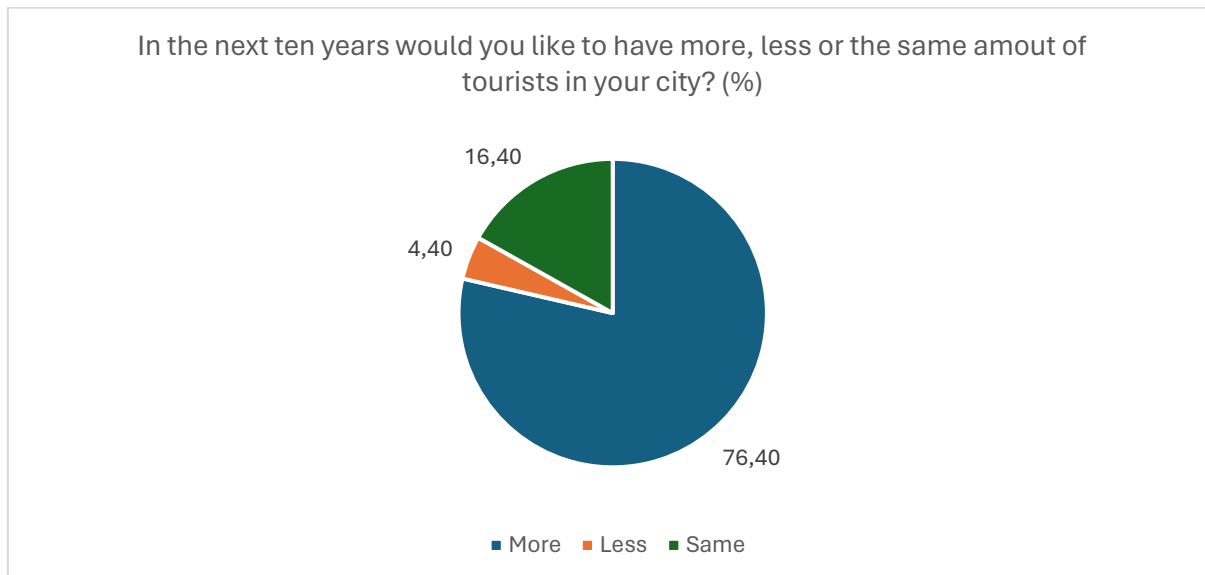


Source: CITE/SETUR-SP



Source: CITE/SETUR-SP

When asked about the volume of tourists in the region in the next ten years, and whether they would like an increase, reduction, or maintenance of this volume of tourists, 76.4% of the population would like to see an increase in the current number of tourists visiting the region, which confirms that tourism is well seen and expected in the city.



Source: CITE/SETUR-SP

1.2 SUSTAINABLE DEVELOPMENT GOALS



According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Aparecida is at **55.3**, highlighting the objectives of renewable and accessible energy that have already been achieved. The city ranks 399th out of 645 municipalities in the state of São Paulo.

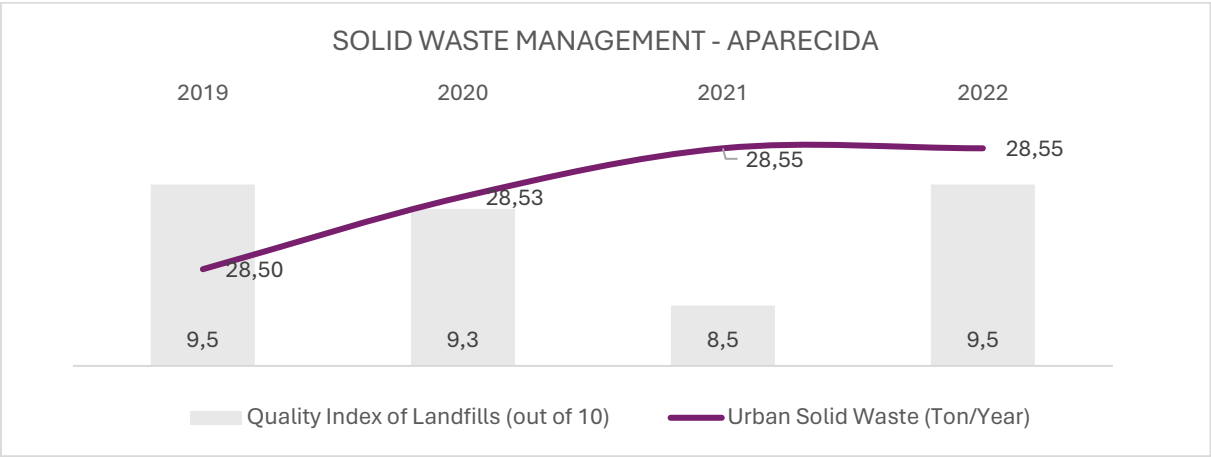
Considering the goal of potable water and sanitation, there are still great challenges regarding the population served with household collection of urban solid waste (0.0 of 80). Regarding the goal of decent work and economic growth, there are still significant challenges to be overcome, especially about GDP per capita (29,969.65 of 38,000) and employed population between 10 and 17 years old (23.37 of 7.59).

There are also great challenges in the goal of sustainable production and consumption regarding the recovery of selectively collected urban solid waste (0.59 of 25.48). In the objective of climate actions, Aparecida still faces significant challenges, mainly regarding

CO²e emissions per capita (3.33 of 2) and the proportion of strategies for risk management and prevention of natural disasters (36 of 80).

(Source: Sustainable Development Index of the State of São Paulo - 2020)

1.3 SOLID WASTE MANAGEMENT

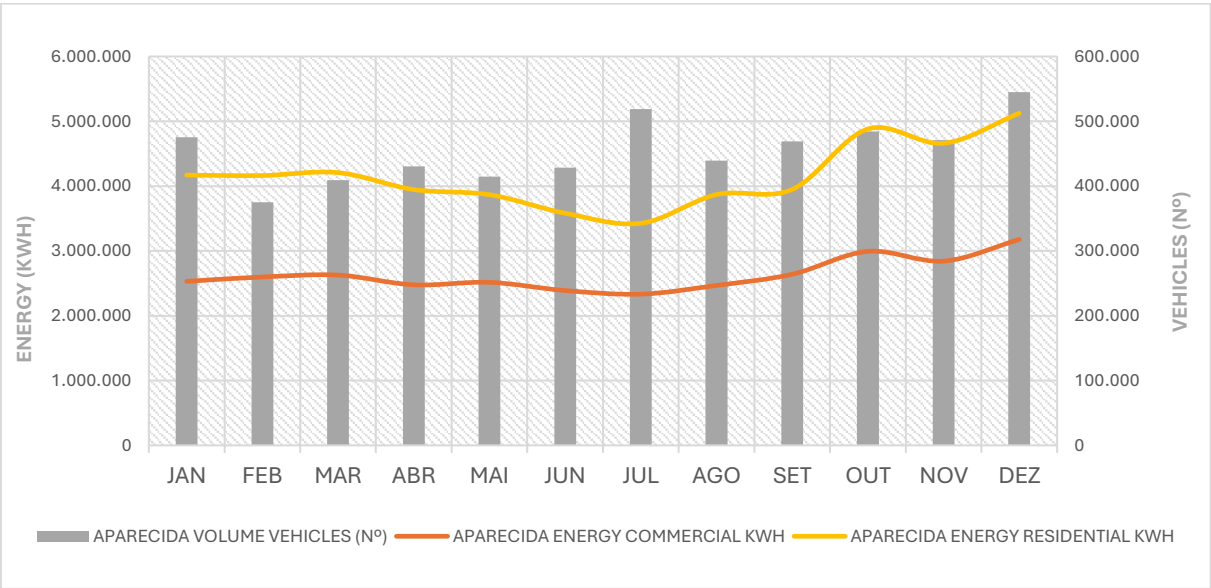


Source: Environmental Company of the State of São Paulo (CETESB)

1.4 ELECTRICITY MANAGEMENT

The highest energy consumption in Aparecida occurs during the months of December and October. October marks the celebration of Our Lady of Aparecida, the peak tourist season in the state, with consumption reaching 16% higher than the yearly average.

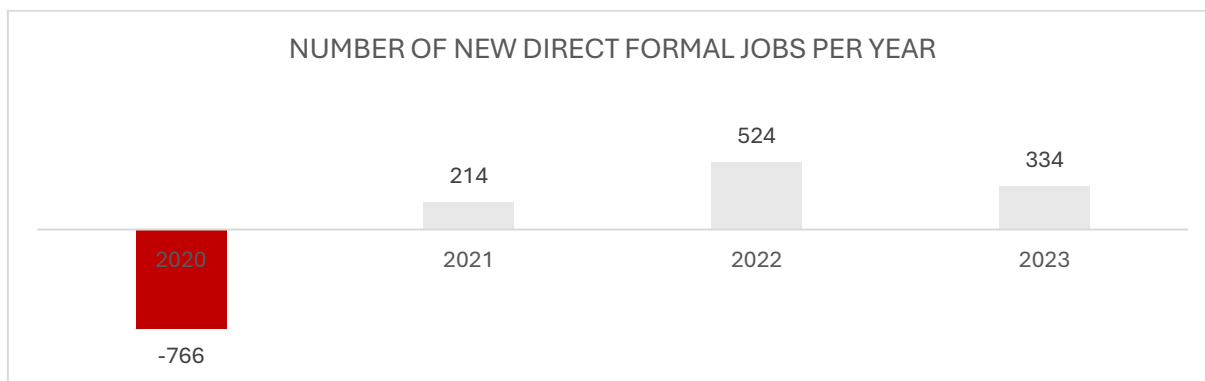
Aparecida energy consumption 2023 (KWH)



Source: EDP

1.5 EMPLOYMENT

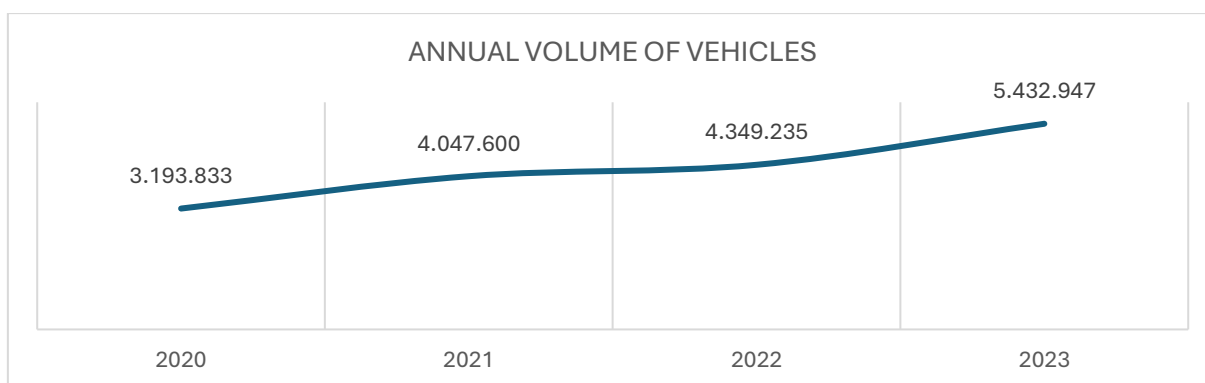
The city of Aparecida has, currently, 3.057 people formally employed in the tourism-related sectors, mostly the hospitality and food sectors, which accounts for 26% of its occupied population of 11,739 people (IBGE/2021). The year 2023 closed with a balance of 334 direct formal jobs, recovering the losses during the pandemic.



Source: Ministry of Labor, CITE/SETUR-SP

1.6 VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Aparecida is located in the Paraíba Valley and the Dutra Highway, which crosses the city, is one of the main connections of the state of São Paulo with the states of Rio de Janeiro and Minas Gerais. The movement of 5.4 million vehicles in 2023 is 17% bigger than in 2022. On weekends (Friday to Sunday) there were 1.9 million vehicles, which represents 36% of the total number of vehicles during the year.

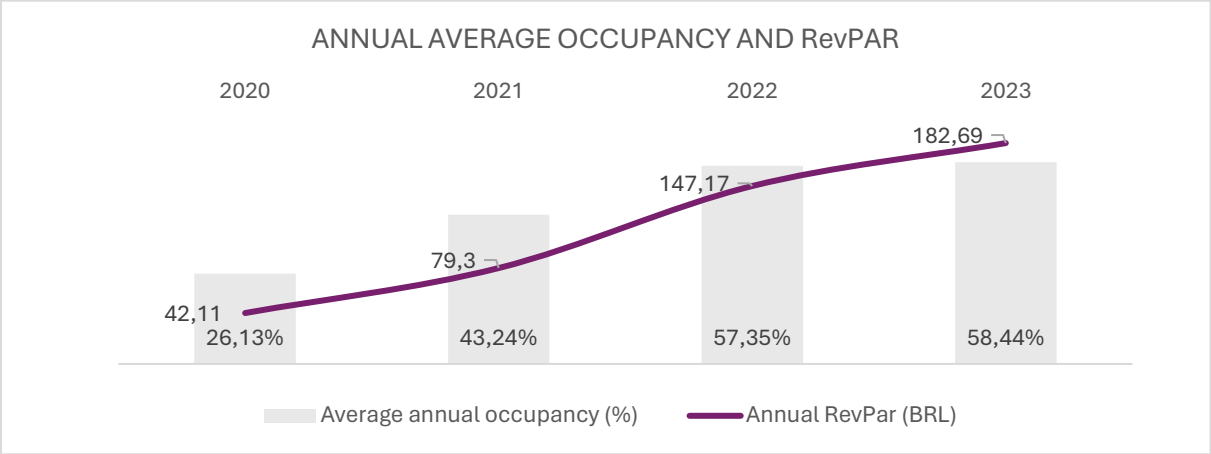


Source: São Paulo State Transportation Agency – ARTESP

1.7 ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism's national registration system for individuals and enterprises in the tourism sector, Aparecida has 45 accommodation facilities with 2,880 rooms and 1,091 accessible rooms (which accounts for 38% of the total of rooms), as recorded in December 2023.

The city of Aparecida, alongside the cities of the “Vale do Paraíba”, showed improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 55% and RevPAR of BRL 219,04, representing an increase of 6.2 percentage points in occupancy and +41,9% variation in RevPAR when compared to 2022.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

1.8 NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM

APARECIDA	JANUARY/2023	JANUARY/2024
Travel Agencies and Tour Operators	7	9
Tour Guides	19	22
Accommodation	50	45
Event Organizers	3	2
Service Provider Specialized in Tourism Segments	2	3
Restaurants, Cafes, Bars and Similar	9	8
Tourist Carrier	4	6
TOTAL	94	95

Source: Ministry of Tourism

2. BROTAS

Located in the central region of the State of São Paulo is the city of Brotas, 246 km from the Capital. Its area of 1,101 square kilometers allows a wide variety of options for its visitors and its 23,898 residents (IBGE 2022).

Tourist activity is the city's main source of income and stands out in adventure tourism, even earning the nickname “National Adventure Capital”. In the municipality, it is possible to practice rafting, night rafting, mini-rafting, kayak rafting, canyoneering, zip lining, tree climbing, tubing, quad biking, mountain biking, and off-road riding. One of the main points of Brotas is the Jacaré Pepira River, which is of great importance for tourism in the municipality. The mapping of the river's potential in the 90s demonstrated the city's vocation for Ecotourism. The river is 174 km long and flows into the Tietê River (the main river in the state), which has more than 50 waterfalls with a diversity of fauna and flora throughout its length. (Source: Travel and Tourism Secretariat of the State of São Paulo).

In 2023, one of the main actions promoted by the Brotas Municipal Tourism Secretariat was to encourage the development of tourist infrastructure in the region. With significant private investments, the contributions of approximately 110 million reais from Raceville stand out, as well as the doubling of the number of apartments in both Areia Que Canta and Cassorova, renowned eco park resorts that are references for visitors to the metropolitan regions of Campinas and São Paulo. Furthermore, Recanto das Cachoeiras Resort also received robust private investments, strengthening the city's tourist offer.

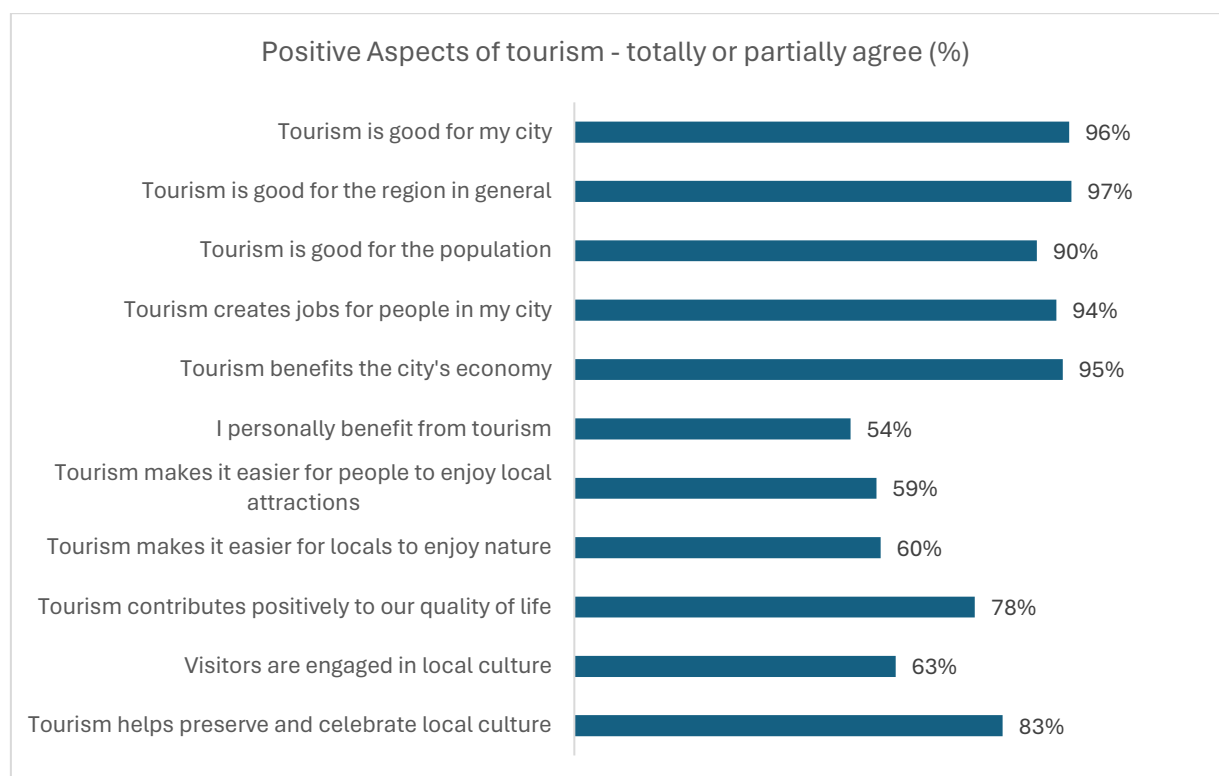


Brotas' Rapids – photo by Ken Chu

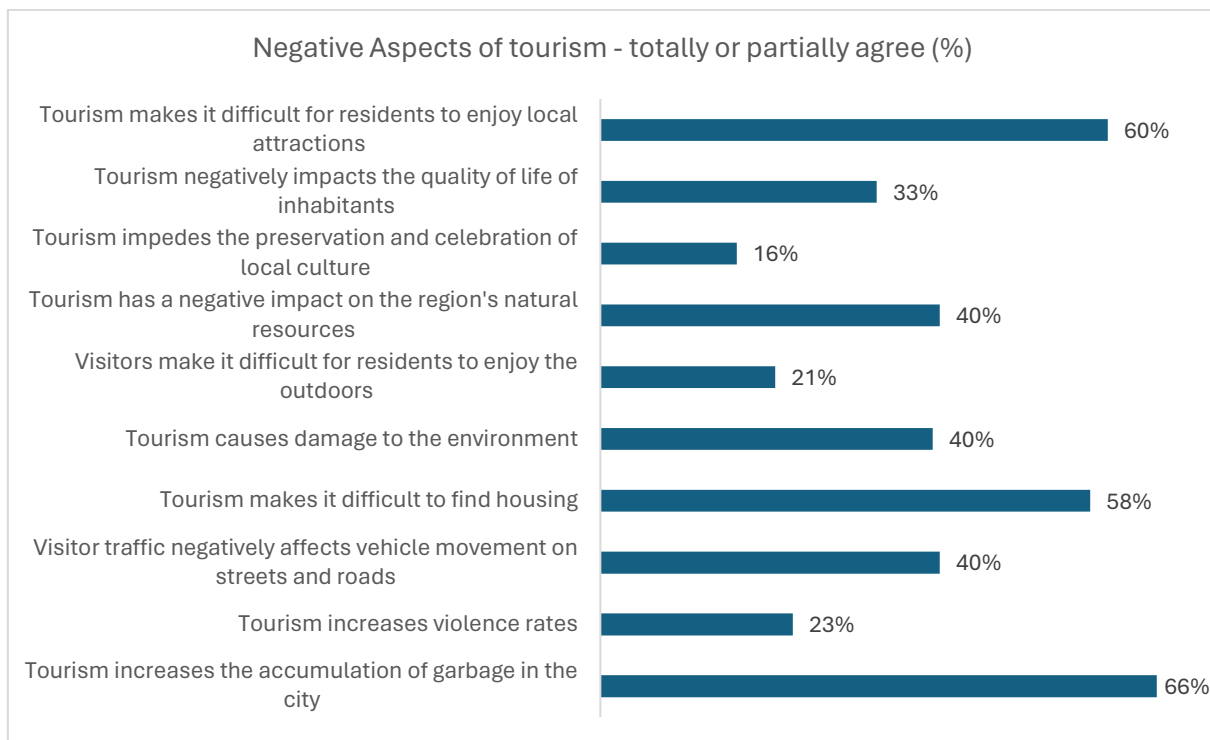
2.1. LOCAL SATISFACTION WITH TOURISM

Brotas had 240 residents participating in the tourism perception survey carried out at the end of 2023. For the survey to be a success, local stakeholders must be involved for the duration of the survey. The results, released at the beginning of the year, are used by local managers in the construction of their annual municipal tourism plans.

It is possible to observe that the population of Brotas considers tourism as beneficial for the city and the population, creating jobs and improving the economy. However, almost half of the population doesn't see themselves as personally benefiting from tourism. Although the resident's perception is quite positive, there are still some aspects that bother them, such as the accumulation of garbage, difficulty finding places to live, and difficulty accessing attractions, which must be considered by the municipality's management.

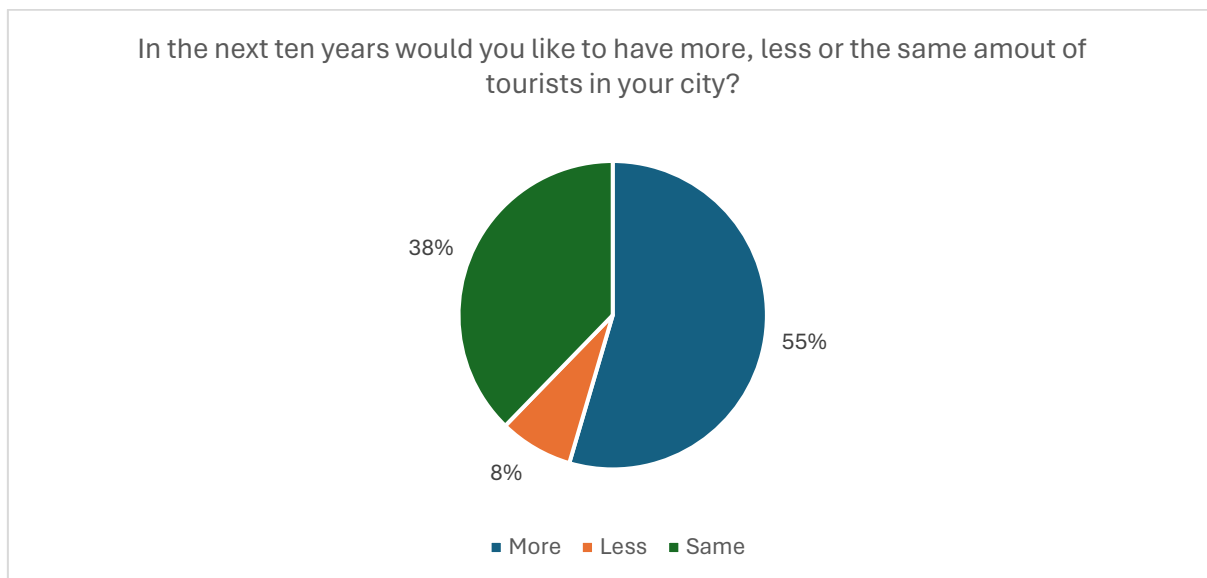


Source: CITE/SETUR-SP



Source: CITE/SETUR-SP

When asked about the volume of tourists in the city in the next ten years, and whether they would like an increase, reduction, or maintenance of this volume of tourists, 55% of the population of Brotas would like to see an increase in the current number of tourists visiting the city.



Source: CITE/SETUR-SP

2.2. SUSTAINABLE DEVELOPMENT GOALS



According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Brotas is at **60.2**, highlighting the objectives of renewable and accessible energy and protection of marine life that have already been achieved. The city ranks 84th out of 645 municipalities in the state of São Paulo.

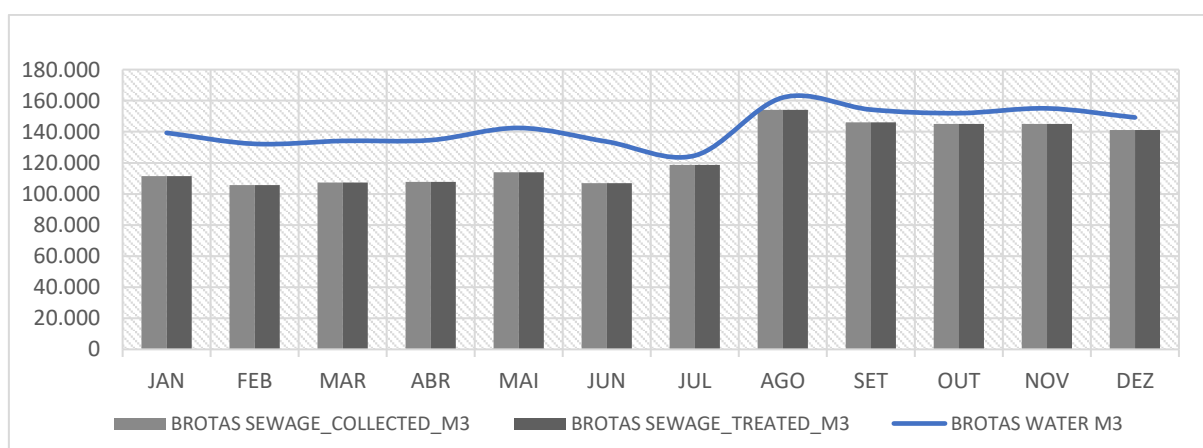
Considering the goal of potable water and sanitation, there are still challenges about water loss in distribution (24.67 of 12.1). Regarding the goal of decent work and economic growth, there are still significant challenges to be overcome, especially about GDP per capita (27,225.67 of 38,000).

There are also challenges in the goal of sustainable production and consumption regarding the recovery of selectively collected urban solid waste (4,67 of 25.48). In the objective of climate actions, Brotas still faces major challenges, most often regarding CO²e emissions per capita (12.85 of 2) and the proportion of strategies for risk management and prevention of natural disasters (8 of 80). Source: Sustainable Development Index of the State of São Paulo – 2020.

2.3. WATER AND SEWAGE MANAGEMENT

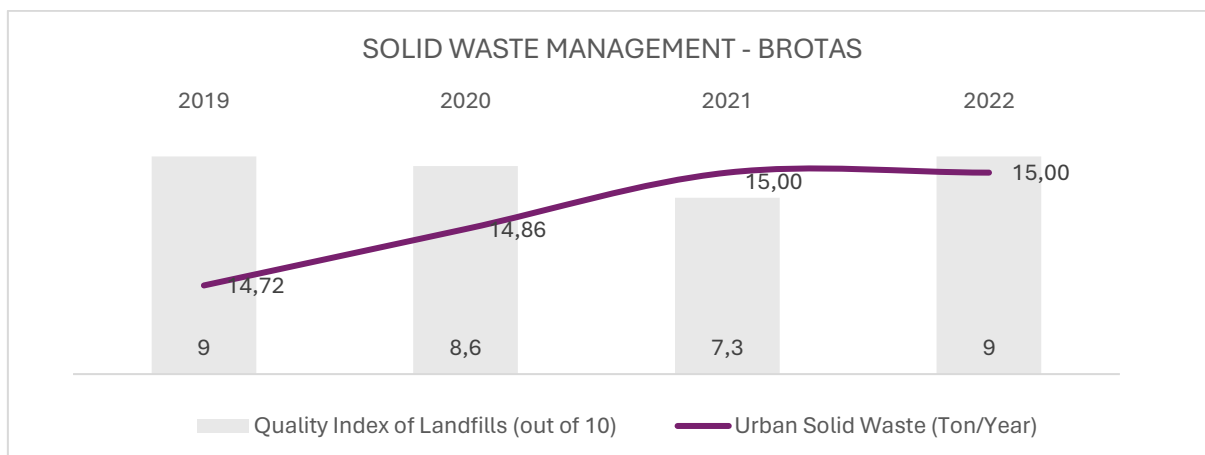
Brotas is equipped with a sewage collection and treatment system to address the needs of its population, effectively treating 100% of the collected sewage. The correlation between the increase in monthly water consumption and the volume of treated sewage is evident.

Brotas water consumption, sewage collected, and sewage treated 2023 (m³)



Source: SAAE Brotas

2.4. SOLID WASTE MANAGEMENT

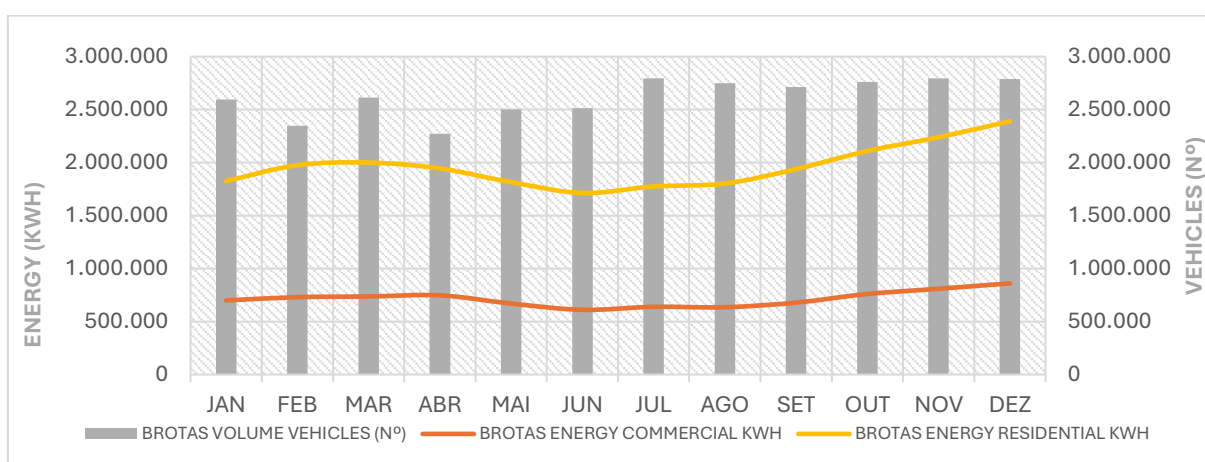


Source: Environmental Company of the State of São Paulo (CETESB)

2.5. ELECTRICITY MANAGEMENT IN 2023

The analysis revealed a significant and consistent increase in energy consumption, encompassing both residential and commercial sectors, from October to December. December stands out as the month with the highest consumption, marking a 22% increase compared to the annual average. It's noteworthy that this surge aligns directly with both the peak tourist season in Brotas and extended holidays nationwide, highlighting the strong correlation between visitor influx and energy demand in the region.

Brotas energy consumption 2023 (KWH)

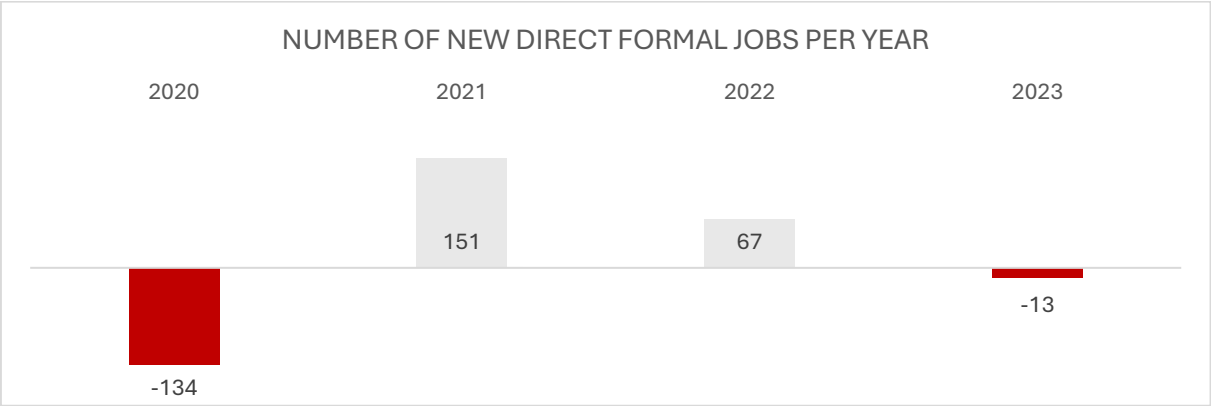


Source: CPFL

2.6. EMPLOYMENT

The city of Brotas has, currently, 824 people formally employed in the tourism-related sectors, foremost in the hospitality, food, and entertainment sectors, which accounts for 11,4% of its occupied population of 7,200 people (IBGE/2021). The year 2023 closed with

a negative balance of -13 direct formal jobs, especially due to the large number of layoffs in the sports, recreation, and leisure activities sector. It is believed that this number was caused by changes in tax laws for small and micro-entrepreneurs in 2023, which led many to become informal or register in other sectors. The effects of the new law can be clearly observed in smaller cities but are diluted in cities with a larger active population.

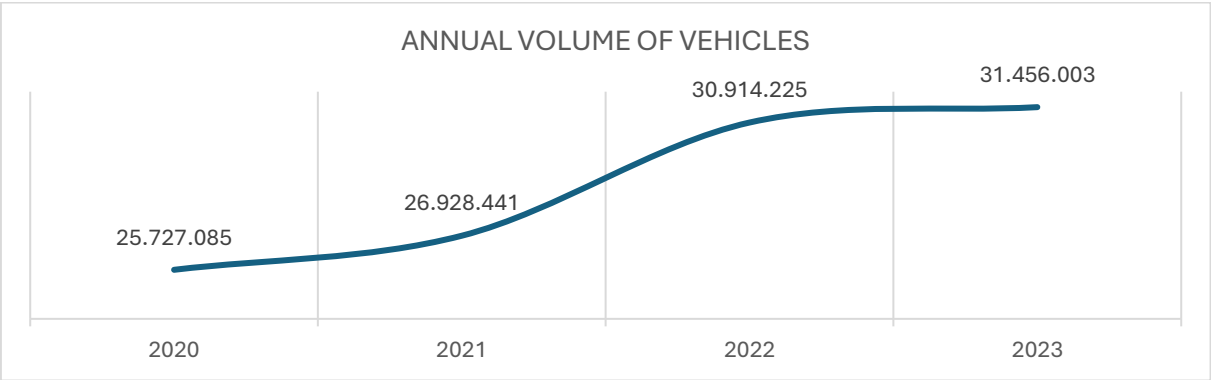


Source: Ministry of Labor, CITE/SETUR-SP

2.7. VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Brotas is accessible by two highways coming from the east, west, and south of the state. It is approximately three hours from the Capital and two hours from Campinas (the two most populous cities in the state) and the nearest airport is 110km away to the west in the city of Bauru.

The movement of 31.5 million vehicles was recorded on the access roads to Brotas in 2023, with 12.6 million vehicles on weekends alone (Friday to Sunday) representing 40% of the total number of vehicles in the year.



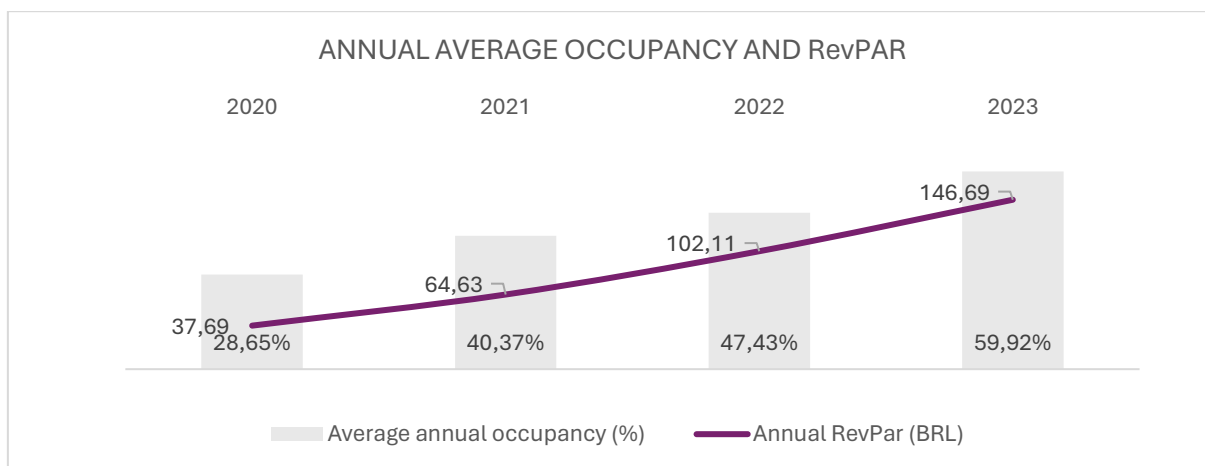
Source: São Paulo State Transportation Agency - ARTESP

2.8. ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism's national registration system for individuals and enterprises in the tourism sector, Brotas has 27 accommodation facilities with 535 rooms and 45 accessible rooms (which accounts for 8% of the total of rooms), as recorded in December 2023.

The city of Brotas, as well as nearby cities within the Serra do Itaqueri region, showed constant improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 60% and RevPAR of BRL 146.69, representing an increase of 12.5 percentage points in occupancy and +43.7% variation in RevPAR when compared to 2022.

Considering that the historical series of accommodation performance only began in July 2020, there is no means to make a comparison with pre-pandemic numbers.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

2.9. NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM

BROTAS	JANUARY/2023	JANUARY/2024
Camping Sites	1	2
Travel Agencies and Tour Operators	10	14
Support to Nautical Tourism and Sport Fishing	1	1
Tour Guides	9	7
Accommodation	24	27
Event Organizers	1	3
Theme Parks	0	1
Service Provider for Support Infrastructure in Events	1	1
Service Provider Specialized in Tourism Segments	3	4
Restaurants, Cafes, Bars and Similar	2	3
Tourist Carrier	3	3
TOTAL	55	66

Source: Ministry of Tourism

3. CAMPINAS

Campinas, with 1,139,047 inhabitants and 97 km from the Capital, combines the pleasures of a rural city with the convenience of a large metropolis. Among the natural attractions are Taquaral Park, Jequitibas Forest, and the Chapadão Quarry. The city has several shopping malls and museums, such as the interesting Coffee Museum, which tells the story of the product that modernized the entire State of São Paulo. For Religious Tourism, the highlight is the Our Lady of Conceição Metropolitan Cathedral.

Opened in 1884, the São Paulo Railway Company station is a historic landmark in the center of Campinas, which represents the splendor of the coffee era and is currently called Cultural Station. The building has architecture built with bricks imported from England, and the station maintained passenger train travel until 2001. Currently, the building is used by the local City Hall for cultural activities and events.

Campinas is of great importance for the state's tourism, as it is where Viracopos International Airport is located, the second largest in the state and departure point for tourists heading to the Capital and countryside.

(Source: Travel and Tourism Secretariat of the State of São Paulo)



Cultural Station – photo by SETUR-SP

3.1. LOCAL SATISFACTION WITH TOURISM

Unfortunately, the city of Campinas and its region did not participate in any of the four editions of the Annual Perception Survey coordinated by CITE.

3.2. SUSTAINABLE DEVELOPMENT GOALS



According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Campinas is at **60.9**, highlighting the objectives of renewable and accessible energy, protection of marine life and industry, innovation, and infrastructure that have already been achieved. The city ranks 56th out of 645 municipalities in the state of São Paulo.

Considering the goal of potable water and sanitation, there are still challenges regarding water loss in distribution (21.5 of 12.1). Regarding the goal of decent work and economic growth, there are still significant challenges awaiting resolution, especially regarding youth unemployment (11.08 of 5.18).

There are also great challenges in the goal of sustainable production and consumption regarding the recovery of selectively collected urban solid waste (0,34 of 25.48). In the objective of climate action, Campinas still faces challenges, mainly referred to the percentage of the municipality deforested (0.13 of 0.05).

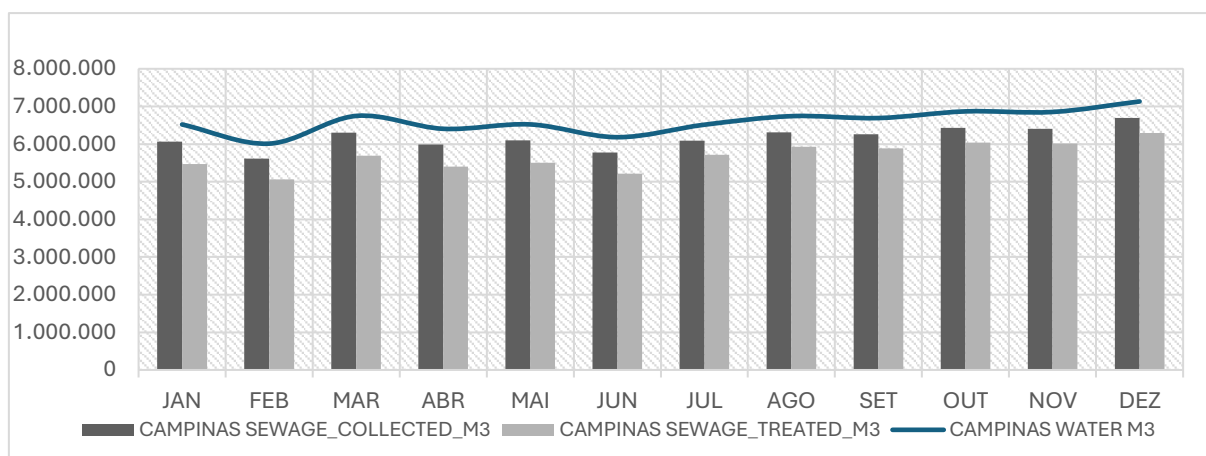
(Source: Sustainable Development Index of the State of São Paulo - 2020)

3.3. WATER AND SEWAGE MANAGEMENT

According to SANASA (Water and Sewage Company of Campinas), Campinas is divided into 3 (three) natural drainage basins for sewage, which were further subdivided into 15 sewage systems.

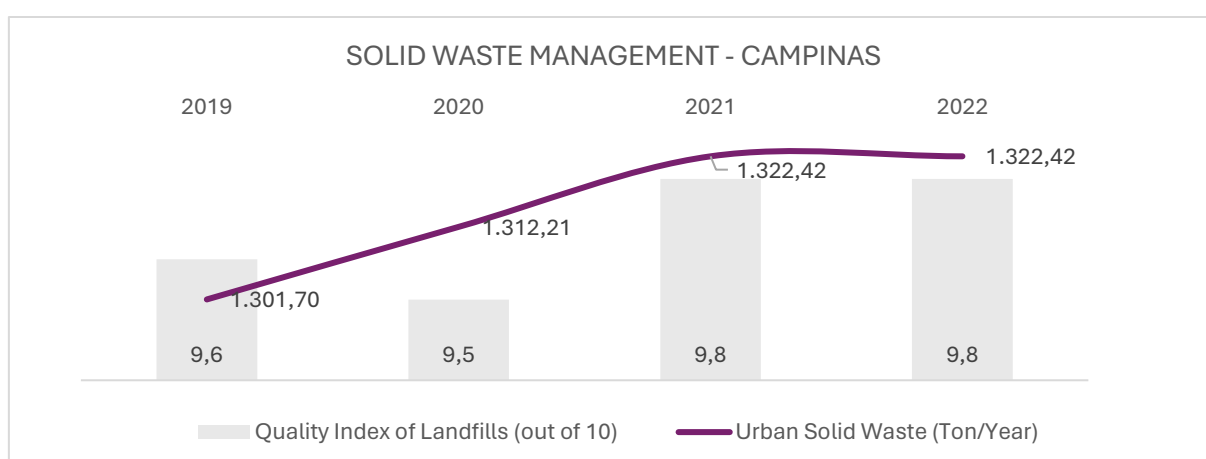
The sewage collection and treatment data for Campinas reveals that up to June 2023, 90% of the collected sewage was treated. Subsequently, from July 2023 onwards, this percentage increased to 94%.

Campinas water consumption, sewage collected, and sewage treated 2023 (m³)



Source: SANASA

3.4. SOLID WASTE MANAGEMENT

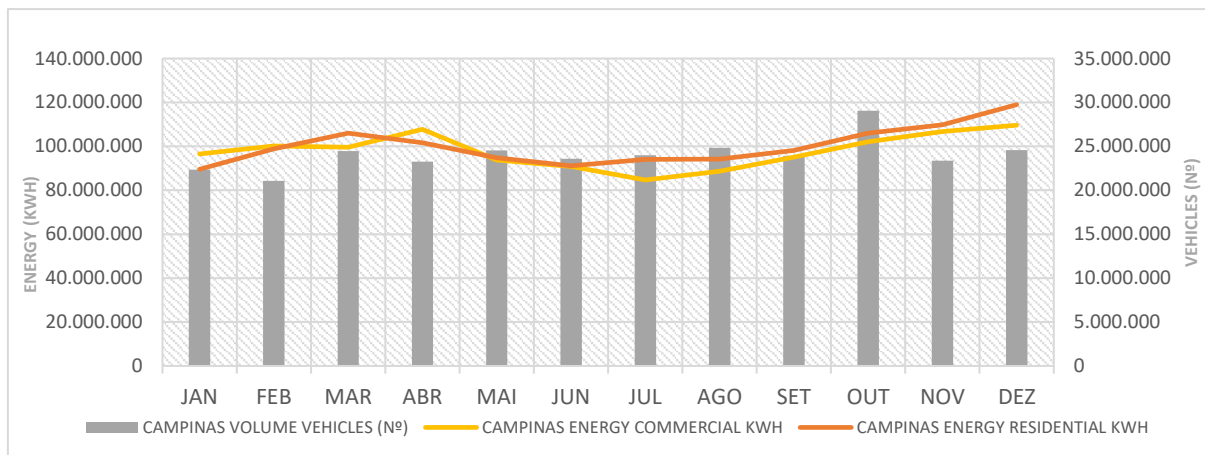


Source: Environmental Company of the State of São Paulo (CETESB)

3.5. ELECTRICITY MANAGEMENT

It was observed that December records the highest energy consumption in Campinas, with a 22% increase compared to the annual average. This surge coincides with the onset of summer in the region, suggesting a correlation between increased energy consumption and the arrival of the warmer season. Additionally, the occurrence of extended holidays between October and December may also contribute to this increase, stimulating tourism and leisure activities. The rising temperatures during summer, coupled with extended holidays, can lead to more intensive use of air conditioning and cooling systems, further boosting energy consumption during this period.

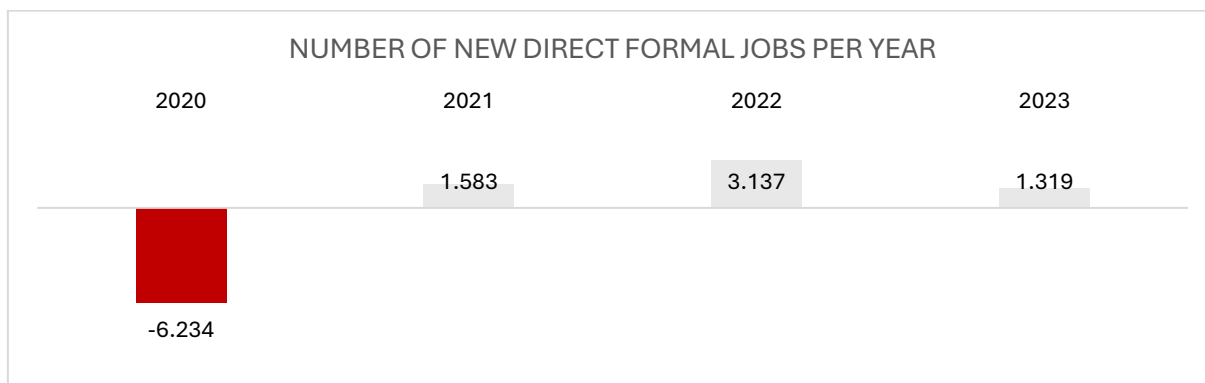
Campinas energy consumption 2023 (KWH)



Source: CPFL

3.6. DIRECT FORMAL JOBS IN TOURISM IN THE CITY OF CAMPINAS

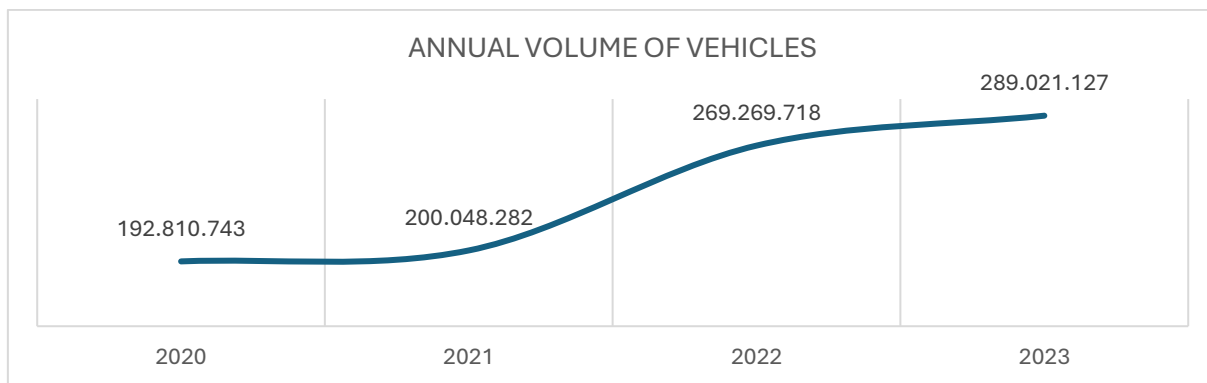
The city of Campinas has, currently, 36,381 people formally employed in the tourism-related sectors, which accounts for 7.66% of its occupied population of 475,000 people (IBGE/2021). The year 2023 closed with a balance of 1,319 new direct formal jobs, which signals a return to normality after the boom in 2022 when the city was still recovering from pandemic losses. However, the city has made up for the losses in 2020 and growth is expected from 2024 onwards.



Source: Ministry of Labor, CITE/SETUR-SP

3.7. VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Campinas is accessible by over 10 roads and highways coming from the east, west, north, and south of the state. The movement of 289 million vehicles on the access roads to Campinas in 2023 is 7.4% bigger than in 2022. On weekends (Friday to Sunday) there were 114,236,446 vehicles, which represents 39.4% of the total number of vehicles circulating on the access roads during the year.

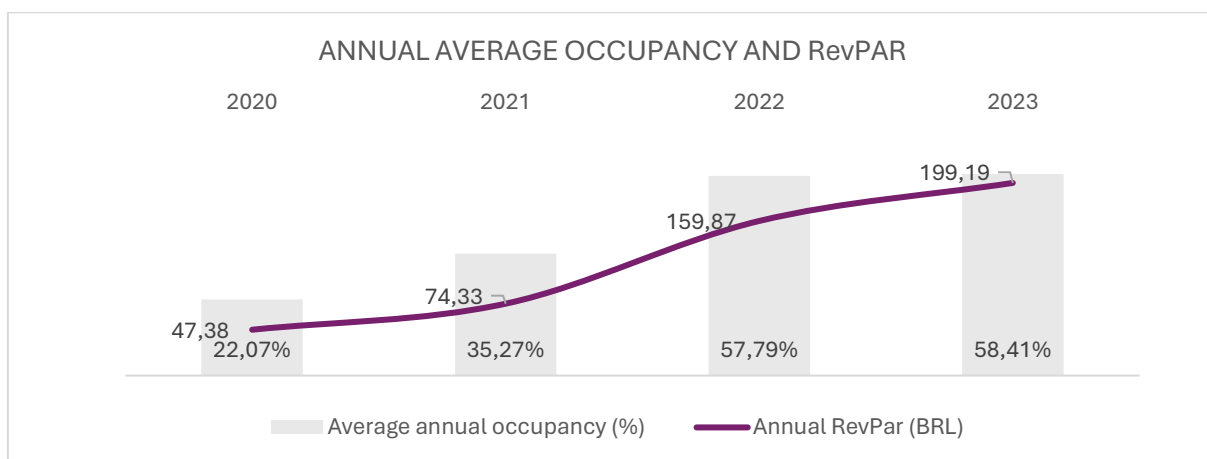


Source: São Paulo State Transportation Agency - ARTESP

3.8. ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism's national registration system for individuals and enterprises in the tourism sector, Campinas has 39 accommodation facilities with 5,936 rooms and 683 accessible rooms (which accounts for 11.5% of the total of rooms), as recorded in December 2023.

The city of Campinas and region showed constant improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 58% and RevPAR of BRL 199.19, representing an increase of 0.62 percentage points in occupancy and +24.6% variation in RevPAR when compared to 2022.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

3.9. NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM

CAMPINAS	JANUARY/2023	JANUARY/2024
Travel Agencies and Tour Operators	386	441
Show houses and tourist entertainment equipment	1	1
Convention Centers	1	1
Support to Nautical Tourism and Sport Fishing	1	1
Tour Guides	125	133
Car Rental Companies	29	27
Accommodation	38	39
Event Organizers	45	46
Theme Parks	1	1
Service Provider for Support Infrastructure in Events	28	26
Service Provider Specialized in Tourism Segments	38	42
Restaurants, Cafes, Bars and Similar	238	244
Tourist Carrier	71	72
TOTAL	1002	1074

Source: Ministry of Tourism

4. CAMPOS DO JORDÃO

Located in “Serra da Mantiqueira”, the city of Campos do Jordão - with 46,974 inhabitants and 182 km from the capital - is at 1,639 m above sea level and is the highest Brazilian municipality. When passing through the city portal, which has a typically European appearance, the visitor enters an environment of refinement and great beauty.

There are more than 4.5 million tourists every year, and in winter alone, more than 1.5 million people. Campos do Jordão is the tenth most visited Brazilian city. The mountain climate, the fog, the fresh air, and the greenery of the Atlantic Forest are ingredients that frame gardens, houses, and buildings that are eye-catching. Touring the city on foot, day or night, the feeling that tourists have is that of strolling through a mini-Europe, which the climate helps to make it more similar. Campos do Jordão was already known by doctors who recommended the city to their patients with respiratory problems.

Bringing Campos de Jordão into the conversation, it's impossible not to mention the Winter Festival, which takes place every year in July. The grand concert music event, whose main setting is the Claudio Santoro Auditorium, attracts 500,000 visitors annually. The success of the festival is so guaranteed that hotel reservations are made practically a year in advance. The Boa Vista Palace houses a collection of colonial and modern art. The Felícia Leirner Museum has open-air sculptures and at the Chocolate Museum, tourists can learn about the food production process, as well as the Casa da Xilogravura Museum, the largest in Brazil of its kind.

(Source: Travel and Tourism Secretariat of the State of São Paulo)

In 2023, the Tourism Observatory of the city launched the Tourist Intelligence System and the destination's Official Promotion Portal. Monitoring is based on data obtained through statistics generated about the municipality by IBGE (Brazilian Institute of Geography and Statistics), SEBRAE - Data MPE Brasil, sampling of 7,747 Tourist Charter Registrations, and filling out 733 visitor forms. The information collected and its combinations will transform into valuable data and provide a basis for various marketing actions. Furthermore, the Secretariat of Tourism and Economic Development of Campos do Jordão highlights the launch of the Official Tourism Calendar, which includes a strategy to reduce seasonality, and highlights the implementation of the city's Place Branding, which gains even more strength from 2024 with the support of local institutions.



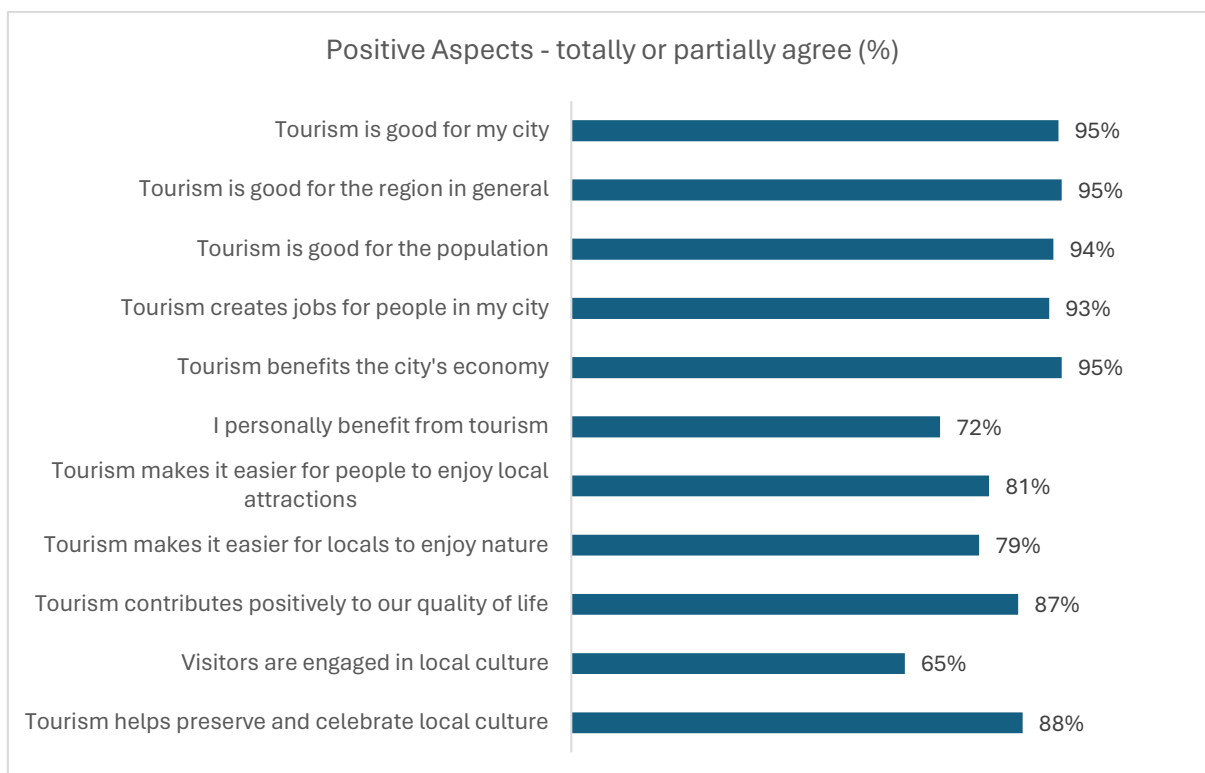
Foto: André Rosa | @andrerosa.com.br

Cable Car at Capivari Park – photo by André Rosa

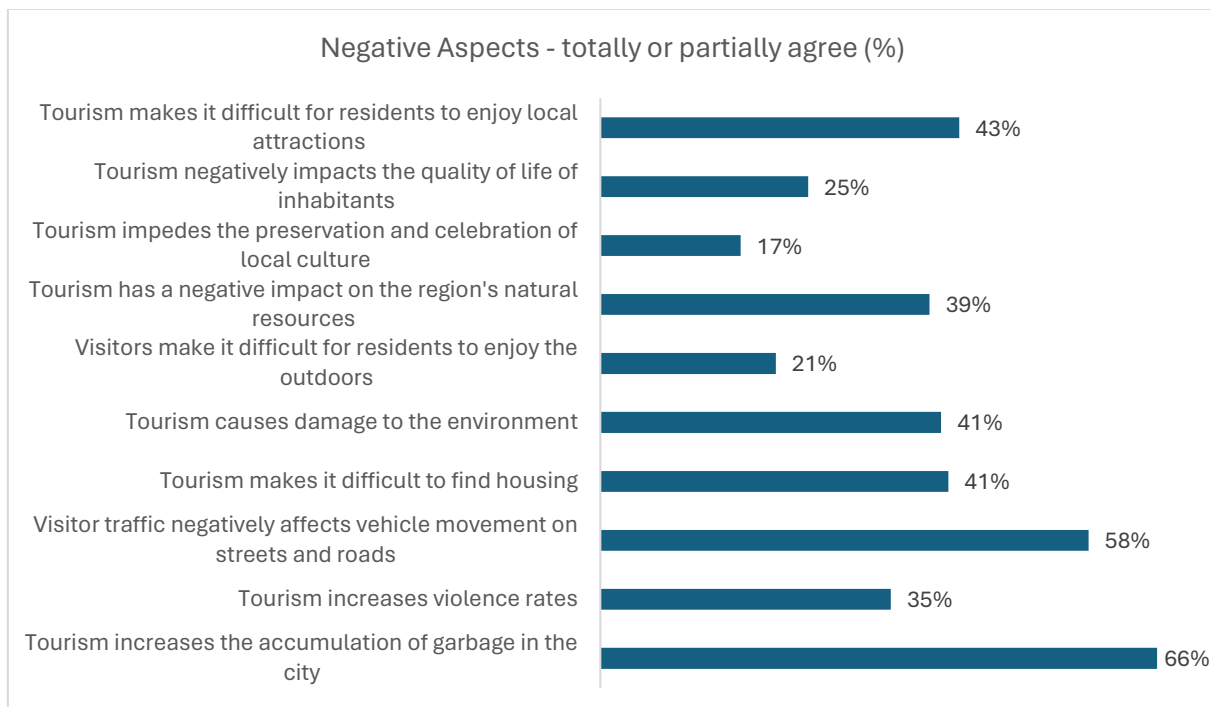
3.1. LOCAL SATISFACTION WITH TOURISM

Campos do Jordão was unable to obtain a minimum sample for the 2023 perception survey (161 of 200), but the six cities in the “Serra da Mantiqueira” tourist region managed a sample of 934 responses and CITE chose to consider the regional result.

The vast majority of the population of the region consider tourism as beneficial for the city and the population, creating jobs and improving the economy, in addition to helping to preserve local culture. Despite the positive perception of tourism in the city and region, we still identify problems related to garbage accumulation and excessive traffic. These problems are identified in almost all the cities that participated in the survey.



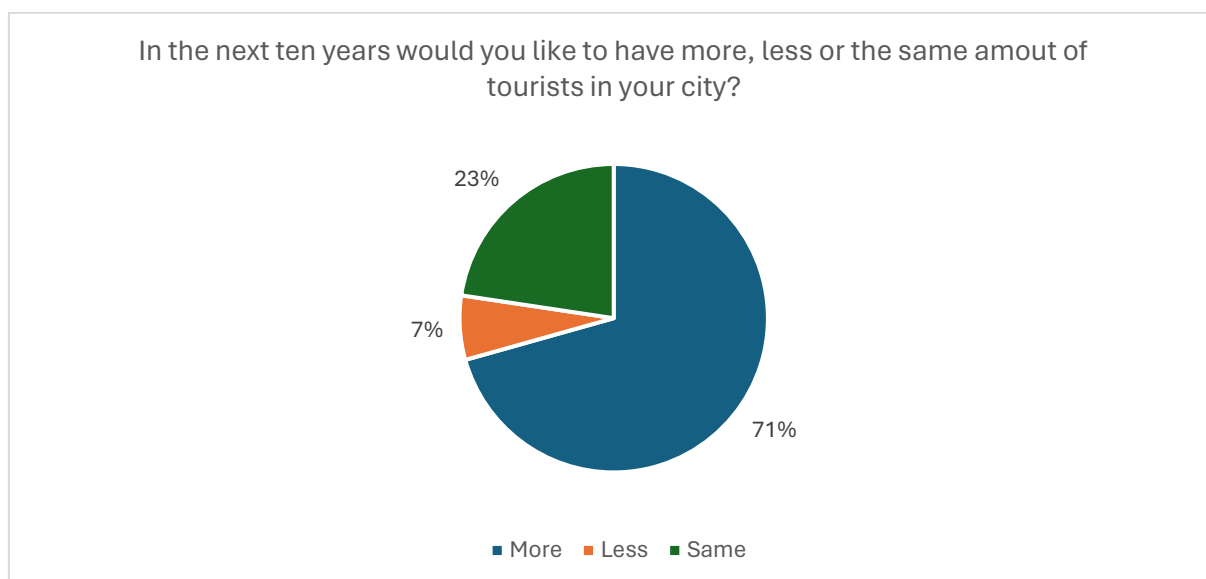
Source: CITE/SETUR-SP



Source: CITE/SETUR-SP

When asked about the volume of tourists in the region in the next ten years, and whether they would like an increase, reduction, or maintenance of this volume of tourists, 71% of

the population would like to see an increase in the current number of tourists visiting their cities.



Source: CITE/SETUR-SP

3.2. SUSTAINABLE DEVELOPMENT GOALS



According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Campos do Jordão is at **58.5**, highlighting the objective of partnerships to implement objectives that have already been achieved. The city ranks 164th out of 645 municipalities in the state of São Paulo.

When considering the objectives of potable water and sanitation, significant challenges persist in terms of the population served with water service (62.28 out of 85) and the population served with sanitary sewage (53.4 out of 70). Similarly, in the pursuit of decent work and economic growth, notable challenges remain, particularly concerning GDP per capita (24,107.48 out of 38,000).

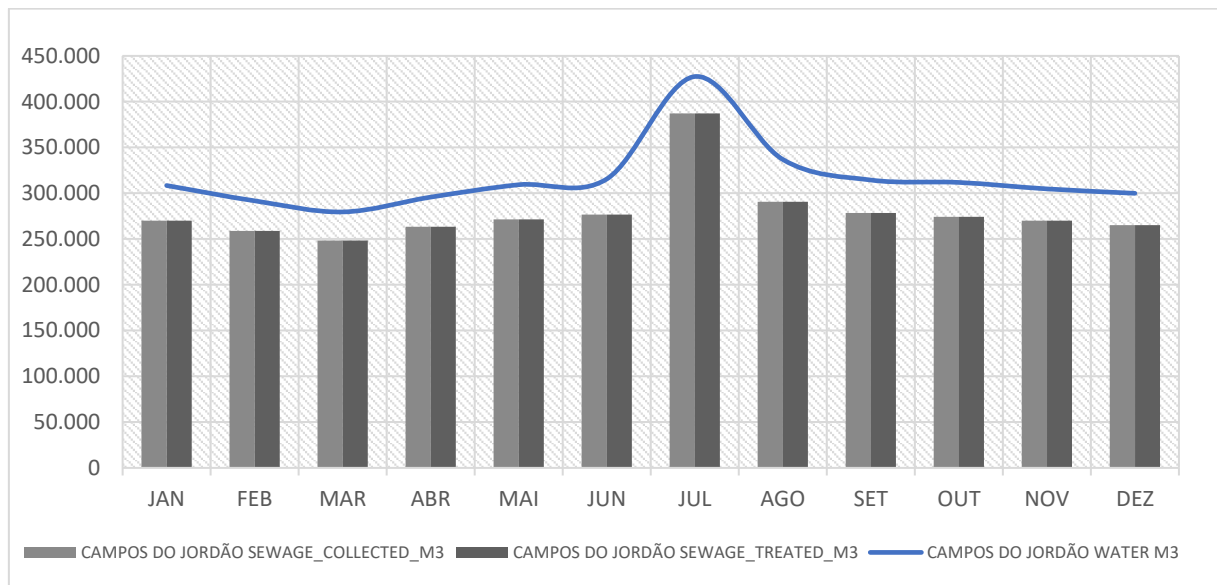
There are also challenges in the goal of sustainable production and consumption regarding the recovery of selectively collected urban solid waste (14.25 of 25.48). In the objective of climate actions, Campos do Jordão still faces challenges, mainly regarding the proportion of strategies for risk management and prevention of natural disasters (64 of 80).

(Source: Sustainable Development Index of the State of São Paulo - 2020)

3.3. WATER AND SEWAGE MANAGEMENT IN 2023

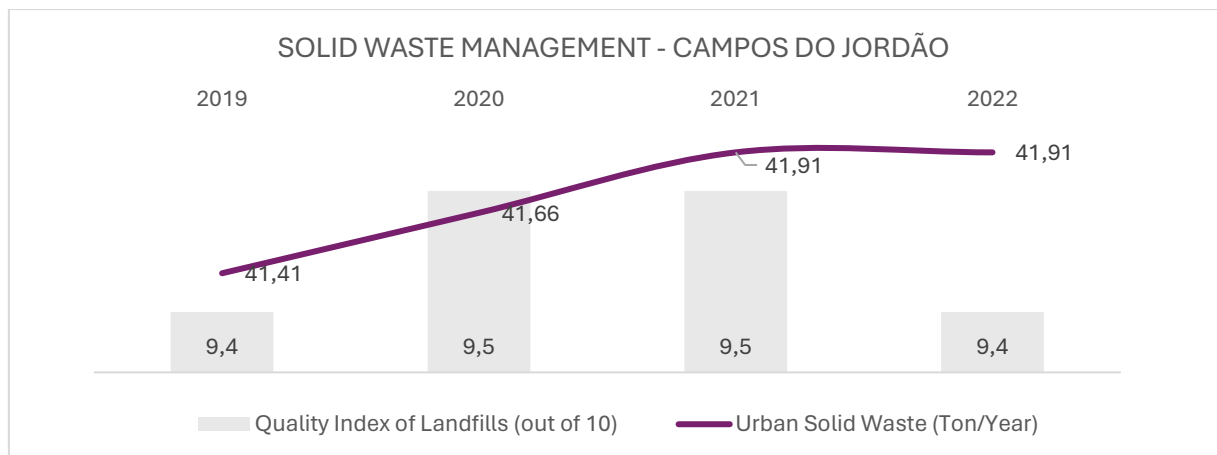
Campos do Jordão is equipped with a sewage collection and treatment system to meet the needs of its population, efficiently treating 100% of the collected sewage. During the month of July, water consumption in the city records a 35% increase. This increase is directly related to the rise in tourist influx during the city's winter festival period. With the arrival of more visitors, there is an additional demand for services and infrastructure, including increased water usage for accommodation, dining, and leisure activities.

Campos do Jordão water consumption, sewage collected, and sewage treated 2023 (m³)



Source: SABESP

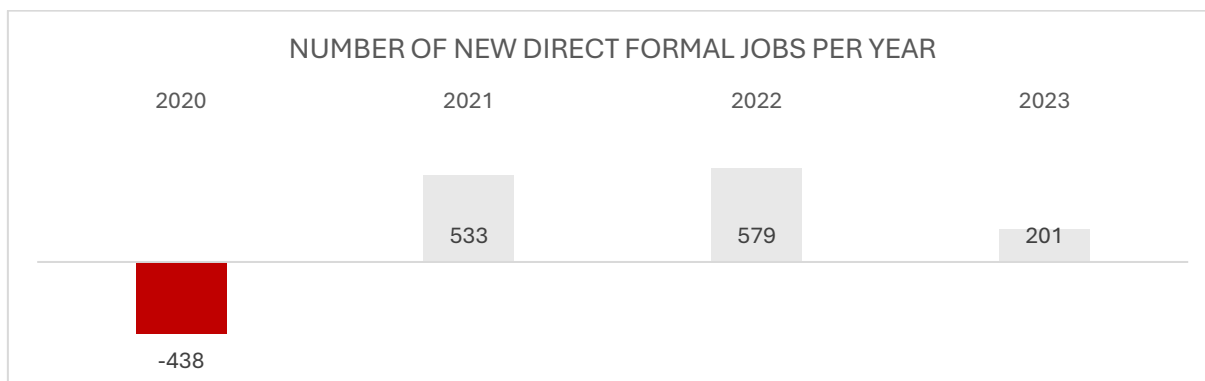
3.4. SOLID WASTE MANAGEMENT



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

3.5. DIRECT FORMAL JOBS IN TOURISM IN THE CITY OF CAMPOS DO JORDÃO

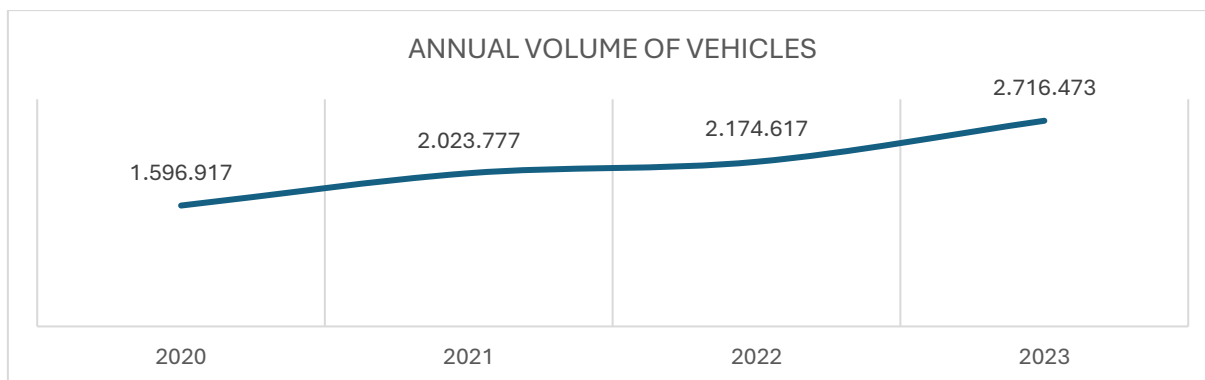
The city of Campos do Jordão has, currently, 4,677 people formally employed in the tourism-related sectors, which accounts for 31.3% of its occupied population of 14,948 people (IBGE/2021). The year 2023 closed with a balance of 201 new direct formal jobs.



Source: Ministry of Labor, CITE/SETUR-SP

3.6. VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Campos do Jordão is located near the border of the state of Minas Gerais and is accessible by one highway coming from the state of Minas Gerais and another coming from the state of São Paulo. The movement of 2.7 million vehicles on the access roads to Campos do Jordão in 2023 is 19.95% bigger than in 2022. On weekends (Friday to Sunday) there were 1.2 million vehicles, which represents 44,4% of the total number of vehicles circulating on the access roads during the year.

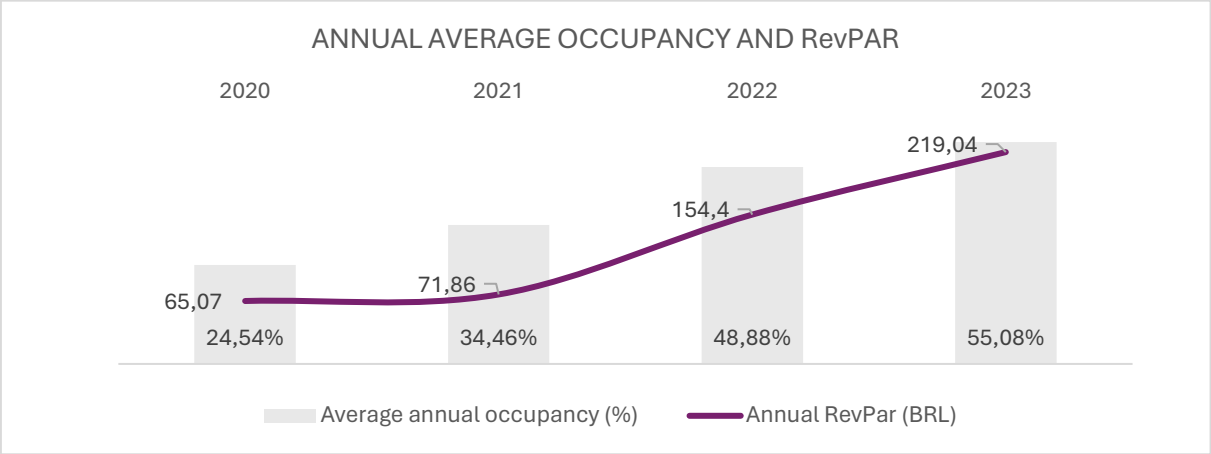


Source: São Paulo State Transportation Agency - ARTESP

3.7. ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism's national registration system for individuals and enterprises in the tourism sector, Campos do Jordão has 91 accommodation facilities with 3,568 rooms and 385 accessible rooms (which accounts for 10.8% of the total of rooms), as recorded in December 2023.

The city of Campos do Jordão alongside the cities of the “Vale do Paraíba”, showed improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 55% and RevPAR of BRL 219,04, representing an increase of 6.2 percentage points in occupancy and +41,9% variation in RevPAR when compared to 2022.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

3.8. NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM OF THE MINISTRY OF TOURISM

CAMPOS DO JORDÃO	JANUARY/2023	JANUARY/2024
Travel Agencies and Tour Operators	29	37
Entertainment and Leisure Companies and Water Parks	4	3
Tour Guides	89	108
Car Rental Companies	7	4
Accommodation	97	91
Event Organizers	14	14
Theme Parks	2	4
Service Provider for Support Infrastructure in Events	5	2
Service Provider Specialized in Tourism Segments	18	18
Restaurants, Cafes, Bars and Similar	46	64
Tourist Carrier	30	36
TOTAL	341	381

Source: Ministry of Tourism

5. ELDORADO

Eldorado is the 4th largest municipality in São Paulo, with over 70% of its area covered by Atlantic Forest in an excellent state of conservation. The city is located south of the State

of São Paulo, in the Ribeira Valley, a region nicknamed “Amazon of São Paulo” by the Portuguese naturalist, botanist, and geologist Manoel Pio Correa, on a scientific visit around the 1920s. The region has been recognized by UNESCO as a “Natural Heritage of Humanity” since February 1993.

Currently, Eldorado is struggling to resume its growth, with the challenge of combining economic development with socio-environmental issues, building a future where the next generations can enjoy its natural and sustainable resources.

According to the Travel and Tourism Secretariat of the State of São Paulo, the city has a population of 13,069 people, its area is 1,657 km² and it is 243 km from the Capital. One of the most iconic points of tourism in Eldorado is the “Caverna do Diabo”, the largest in the entire State of São Paulo, where tourists are guided on a one-and-a-half-hour journey through galleries, stairs, stalactites, and stalagmites (structures of sedimentary rocks formed inside caves) and water currents from a 600-million-year-old rock formation. Eldorado usually receives visitors focused on Ecotourism and Adventure Tourism. The city's inns offer receptive tourism services and usually take visitors to “Parque Estadual Caverna do Diabo”, quilombos such as Ivaporunduva, and several waterfalls. (*quilombos were originally hidden places, usually in the bush, where escaped slaves were sheltered and built their communities*).

According to the Eldorado Department of Tourism, together with the Forestry Foundation and AMAMEL (Association of Environmental Monitors of Eldorado), The “Parque Estadual Caverna do Diabo” received 40,881 visitors in 2023.

The city of Eldorado also claims to have received approximately 10,000 people, including visitors and residents, at the religious festival of Our Lady of Guia, in addition to approximately 10,000 visitors to sporting events throughout the year.



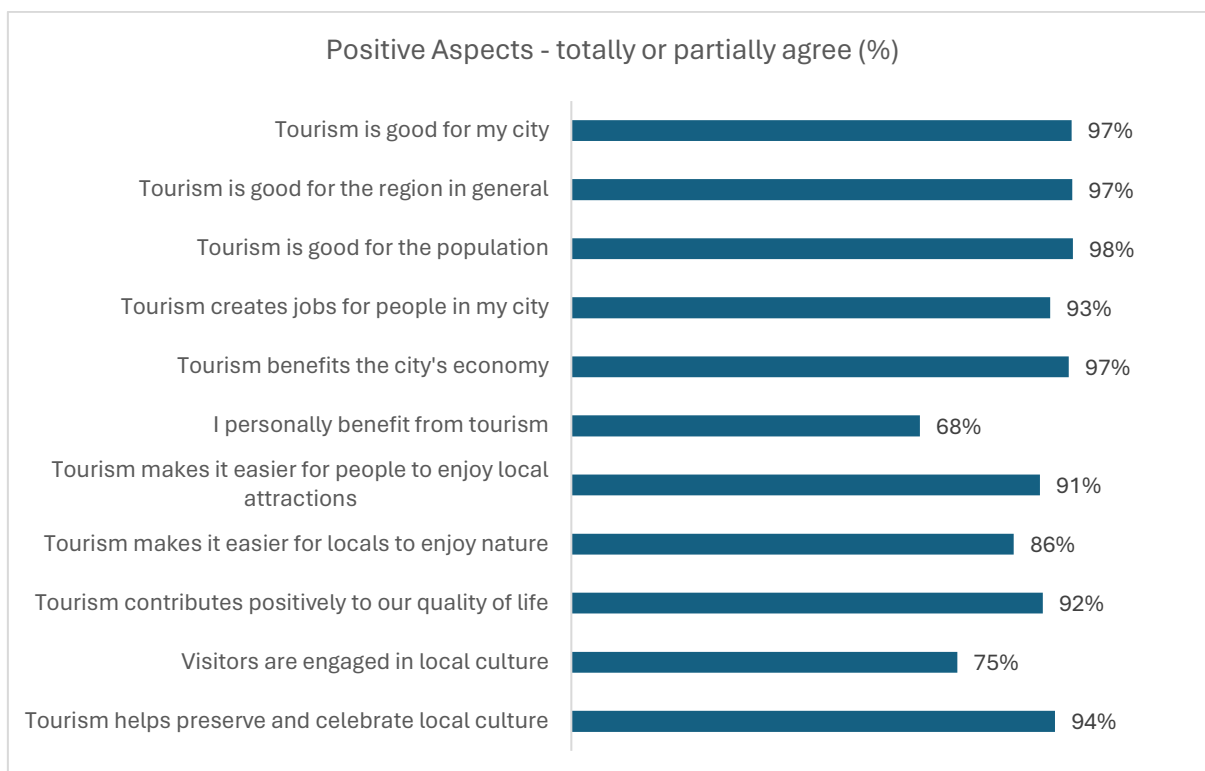
ELDORADO / SP - CAVERNA DO DIABO - KEN CHU - EXPRESSO STUDIO

“Caverna do Diabo” – photo by Ken Chu

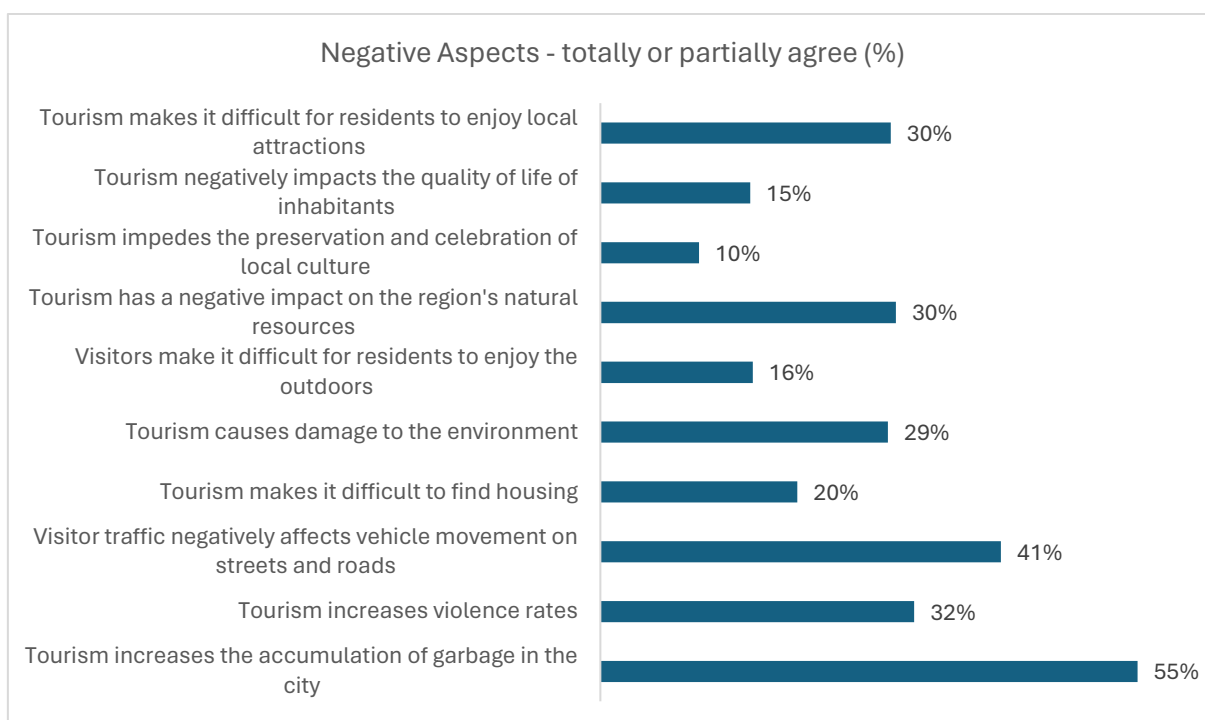
5.1. LOCAL SATISFACTION WITH TOURISM

Eldorado was unable to obtain a minimum sample for the 2023 perception survey (4 of 200), but the nine cities in the Caves of the Atlantic Forest tourist region, where Eldorado is located, managed a sample of 415 responses and CITE chose to consider the regional result.

The overwhelming majority of the population of the region consider tourism as beneficial for the city and the population, creating jobs and improving the economy, in addition to helping to preserve local culture. Like in the other cities monitored by CITE, we still identify problems related to garbage accumulation, but in Eldorado, a smaller part of the population considers garbage a problem when compared to other cities.

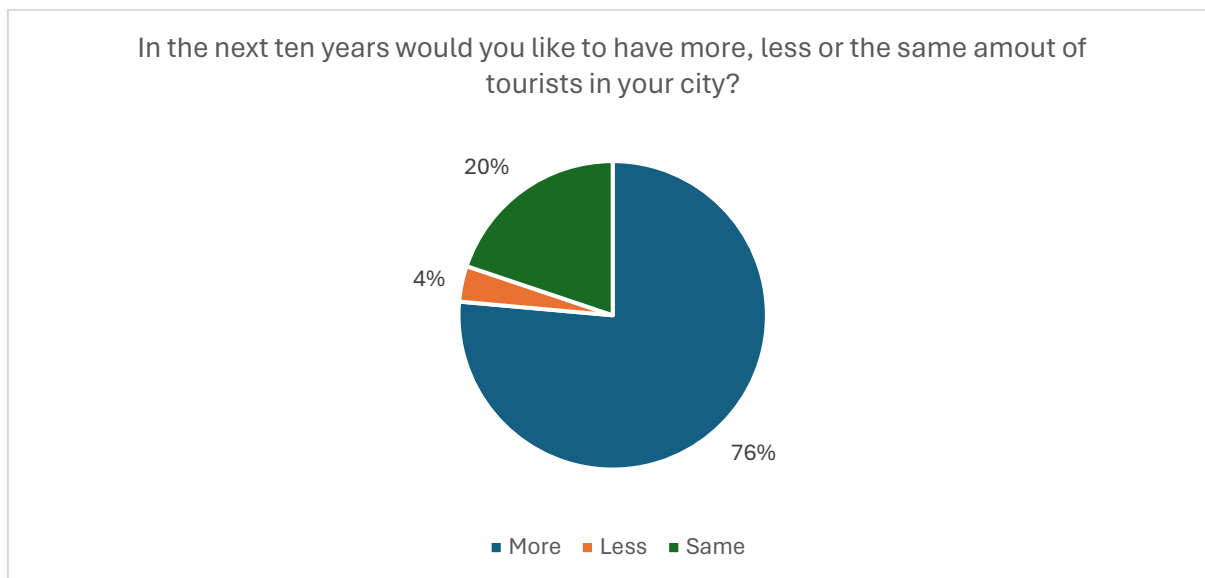


Source: CITE/SETUR-SP



Source: CITE/SETUR-SP

When asked about the volume of tourists in the region in the next ten years, and whether they would like an increase, reduction, or maintenance of this volume of tourists, 76% of the population would like to see an increase in the current number of tourists visiting their cities.



Source: CITE/SETUR-SP

5.2. SUSTAINABLE DEVELOPMENT GOALS



According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Eldorado is at **57.6**, highlighting the objective of protection of marine life that has already been achieved. The city ranks 224th out of 645 municipalities in the state of São Paulo.

Considering the goal of potable water and sanitation, there are still great challenges regarding the population served with water service (49.37 of 85) and the population served with sanitary sewage (45.9 of 70). Regarding the goal of decent work and economic growth, there are great challenges to be overcome, especially in GDP per capita (20,795.32 of 38,000).

There are also challenges in the goal of sustainable consumption and production regarding the recovery of selectively collected urban solid waste (3.07 of 25.48). In the objective of climate actions, Eldorado still faces significant challenges, especially regarding CO²e emissions per capita (4.30 of 2).

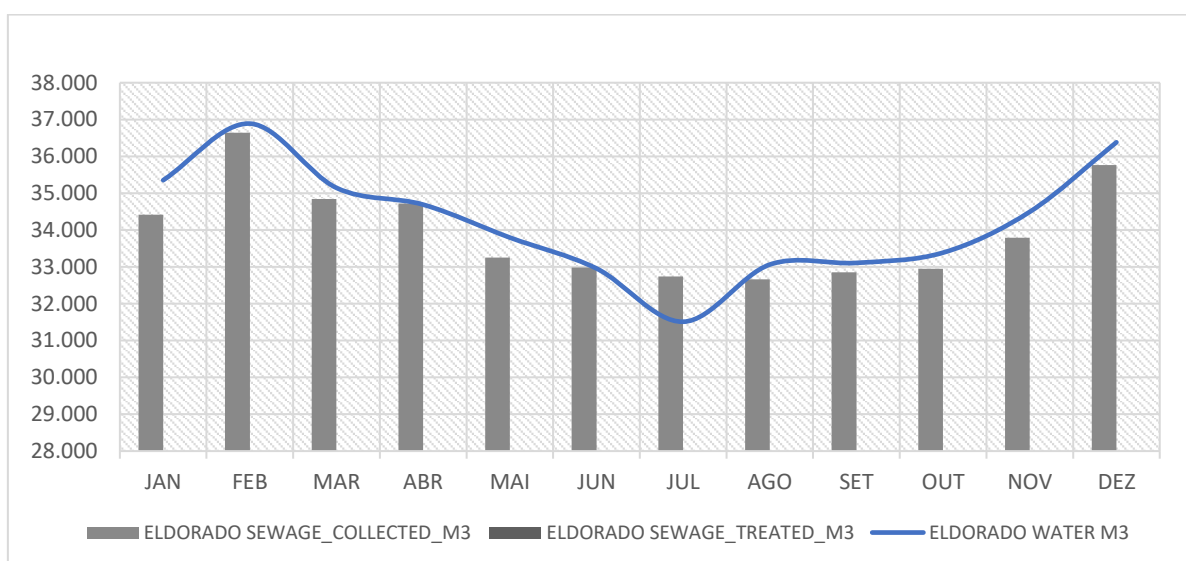
(Source: Sustainable Development Index of the State of São Paulo - 2020)

5.3. WATER AND SEWAGE MANAGEMENT IN 2023

In 2023, Eldorado experienced a significant increase in water consumption during the months of February and December, registering increases of 7% and 6% compared to the annual average, respectively. These periods coincide with the peak of tourist influx, driven by year-end festivities and the carnival holiday. During these months, the city receives many visitors seeking leisure and entertainment, resulting in a significant demand for services and infrastructure, including water consumption for accommodation, food, and recreational activities.

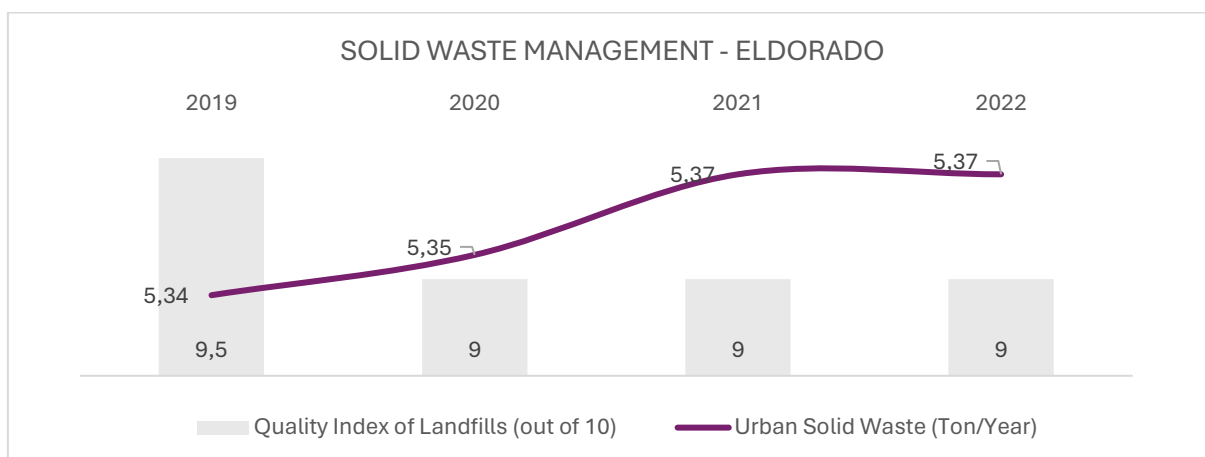
Note: the city did not provide information about sewage treatment.

Eldorado water consumption, sewage collected, and sewage treated 2023 (m³)



Source: SAAE Aparecida

5.4. SOLID WASTE MANAGEMENT

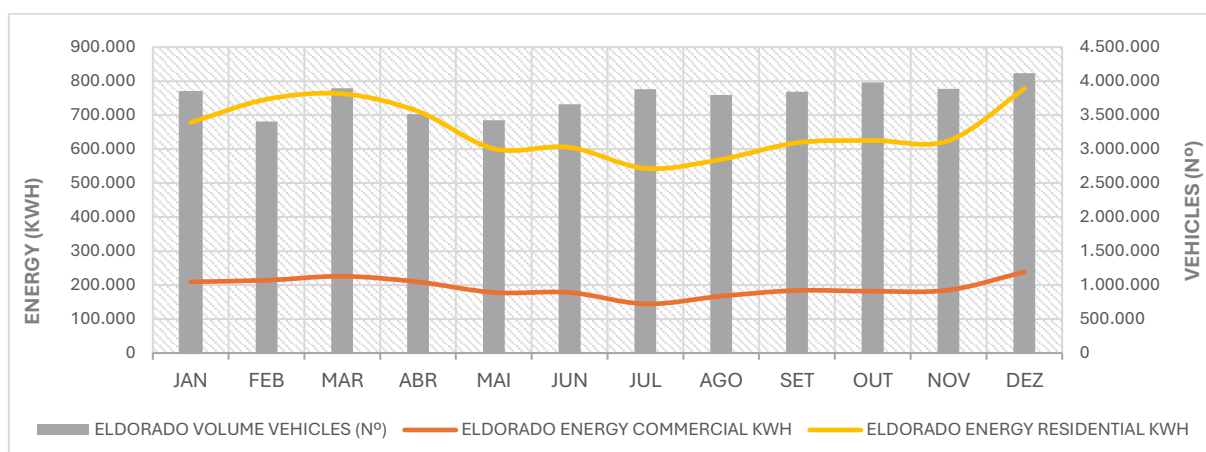


Source: Environmental Company of the State of São Paulo (CETESB)

5.5. ELECTRICITY MANAGEMENT

In December, Eldorado experienced a significant increase in electricity consumption, particularly in the residential sector, reaching 23% above the annual average. This substantial rise is directly related to the influx of visitors during the year-end festivities. With the arrival of these tourists, there is an additional demand for services and infrastructure, including energy consumption for accommodation, dining, and recreational activities.

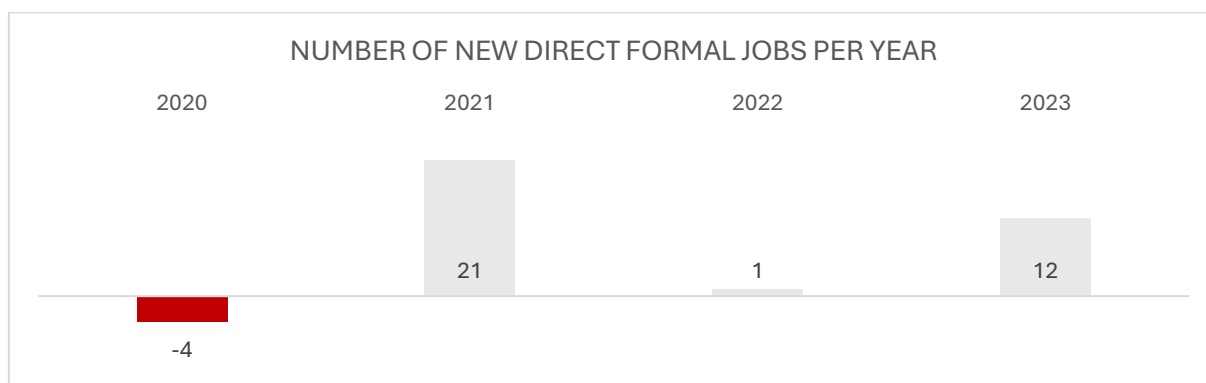
Eldorado energy consumption 2023 (KWH)



Source: EDP

5.6. DIRECT FORMAL JOBS IN TOURISM IN THE CITY OF ELDORADO

The city of Eldorado has, currently, 75 people formally employed in the tourism-related sectors, which accounts for 5.32% of its occupied population of 1,409 people (IBGE/2021). The year 2023 closed with a balance of 12 new direct formal jobs.

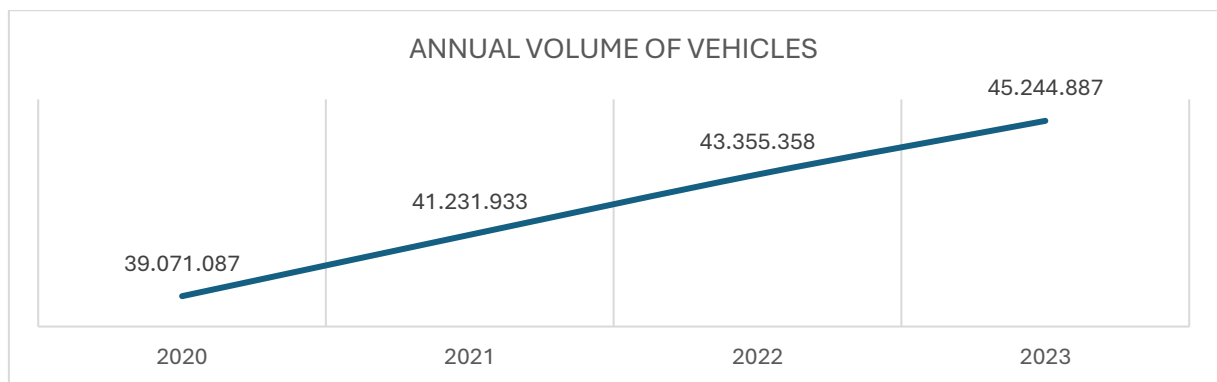


Source: Ministry of Labor, CIET/SETUR-SP

5.7. VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Eldorado is accessible by two highways coming from east and west and we have to consider that the main highway that leads to Eldorado is the most important connection between the Capital São Paulo and the states from the south of the country, which explains the high volume of vehicles, that does not directly reflect on the volume of tourists in the city or region, but it gives us an estimate of increase or reduction in flow.

The movement of 45.2 million vehicles on the access roads to Eldorado in 2023 is 4.4% bigger than in 2022. On weekends (Friday to Sunday) there were 17.4 million vehicles, which represents 38.5% of the total number of vehicles circulating on the access roads during the year.

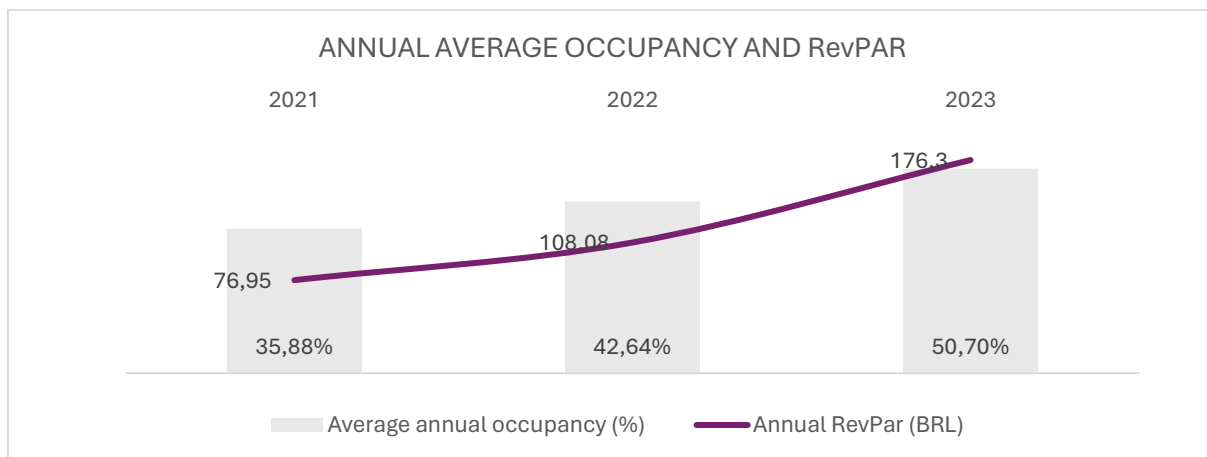


Source: São Paulo State Transportation Agency - ARTESP

5.8. ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism's national registration system for individuals and enterprises in the tourism sector, Eldorado has 5 accommodation facilities with 53 rooms and 12 accessible rooms (which accounts for 23% of the total of rooms), as recorded in December 2023.

The city of Eldorado, among the other cities of the Ribeira Valley, showed improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 50.7% and RevPAR of BRL 176.30, representing an increase of 8.06 percentage points in occupancy and +61.8% variation in RevPAR when compared to 2022.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

5.9. NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM OF THE MINISTRY OF TOURISM

ELDORADO	JANUARY/2023	JANUARY/2024
Travel Agencies and Tour Operators	3	2
Convention Centers	1	1
Tour Guides	4	4
Accommodation	3	5
Service Provider Specialized in Tourism Segments	1	1
Restaurants, Cafes, Bars and Similar	1	0
Tourist Carrier	3	5
TOTAL	16	18

Source: Ministry of Tourism

6. ILHABELA

One of the only Brazilian marine archipelago municipalities, Ilhabela - with 34,934 inhabitants and 207 km away from the Capital - has tourism as the basis of its economy, and has to its credit landscapes of beaches with preserved Atlantic Forest, waterfalls, and trails, in addition to “*caiçara*” (population of the coast of São Paulo) culture, stories and traditions. Highlights include activities such as bird watching, which attracts tourists from all over the world. There are more than 40 beaches around the main island, as well as other islets that are part of the archipelago. Ilhabela is also internationally recognized for its nautical events, such as the Ilhabela International Sailing Week, the largest event in the sector in Latin America, always in July.

(Source: Travel and Tourism Secretariat of the State of São Paulo)

According to the Ilhabela City Tourism Observatory, the city has stood out on the tourist scene not only for its exuberant natural beauty but also for the innovative and strategic initiatives that have boosted the sector on the island. The selection of Ilhabela in the Sebrae/BID notice of the “Future Brazil Program – Smart Tourist Destinations” reflects the commitment to developing activity management in a sustainable and attractive way, always seeking new opportunities for growth and improvement.

The structuring of trails and the creation of an accessible waterfall demonstrate the care taken to provide inclusive tourist experiences and preserve the environment, allowing visitors of all ages and abilities to enjoy the natural beauty of Ilhabela in a safe and conscious way.

Whale watching is another activity that has gained prominence on the island, offering tourists the opportunity to experience unique moments in contact with marine fauna in a responsible way. The awareness-raising actions done by the Ilhabela Tourism Department at marinas and schools, in partnership with the Jubarte Whale Institute, Viva Institute, and Verde Azul Institute, reinforce Ilhabela's commitment to sustainability and the best experience for visitors.

Although the year 2023 will be marked in the history of the North Coast of São Paulo, due to the heavy rains at the end of February that hit the region, which directly impacted tourist activity in Ilhabela, the municipality's active participation in the main national and international tourism fairs, such as WTM, FIT Buenos Aires, Sea Trade, ANATO Colombia, ABAV, among others, have increased Ilhabela's visibility in the global market, attracting a growing diverse audience, which has contributed to maintaining tourism indicators with good results.

With an average annual occupancy rate of 67.26%, Ilhabela demonstrates its ability to attract visitors throughout the year, offering a variety of attractions and activities for all tastes. Almost 2 million tourists visited the destination throughout 2023, which contributed to companies in the sector reaching the revenue mark of BRL

173,273,191.01, generating around BRL 3,811,564.59 for public coffers from Services Tax (ISS).

Thus, the actions and initiatives implemented in Ilhabela highlight the island's tourism potential, its concern with environmental conservation, and the constant search for innovation and excellence in the sector, consolidating it as an unmissable destination in the state of São Paulo and Brazil.

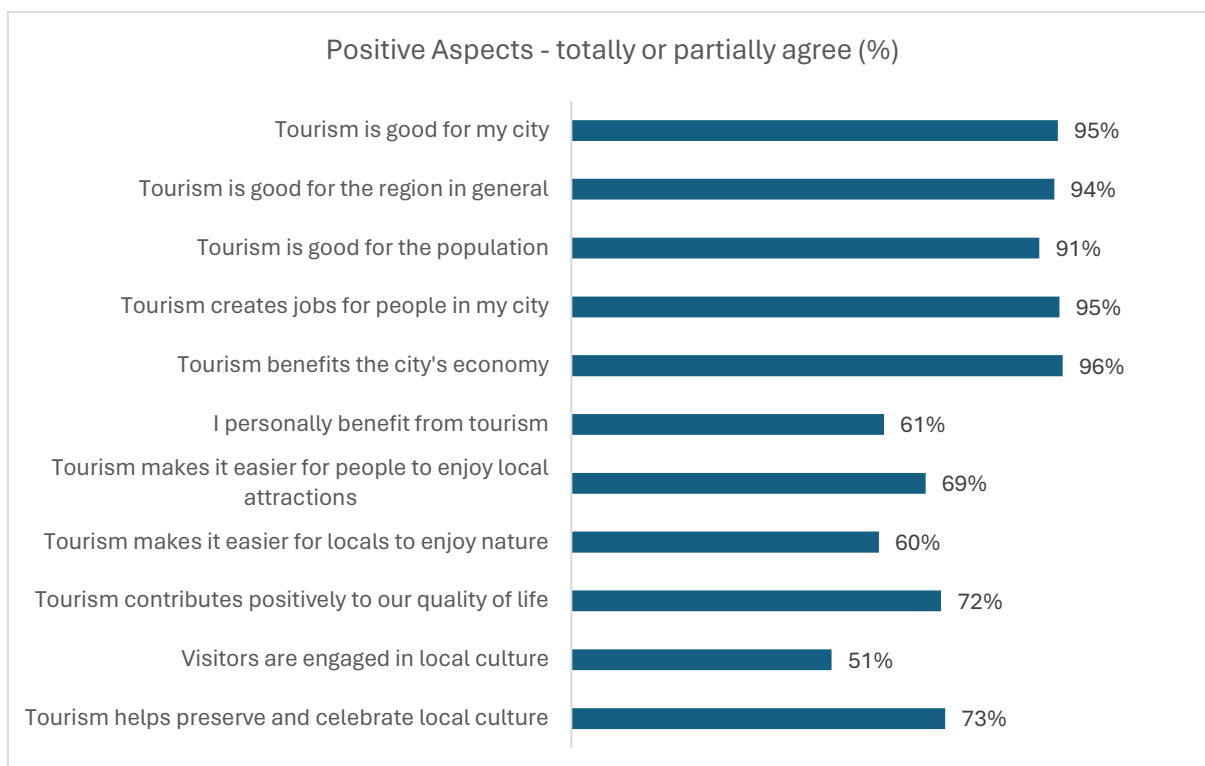


Castelhanos Beach – photo by SETUR-SP

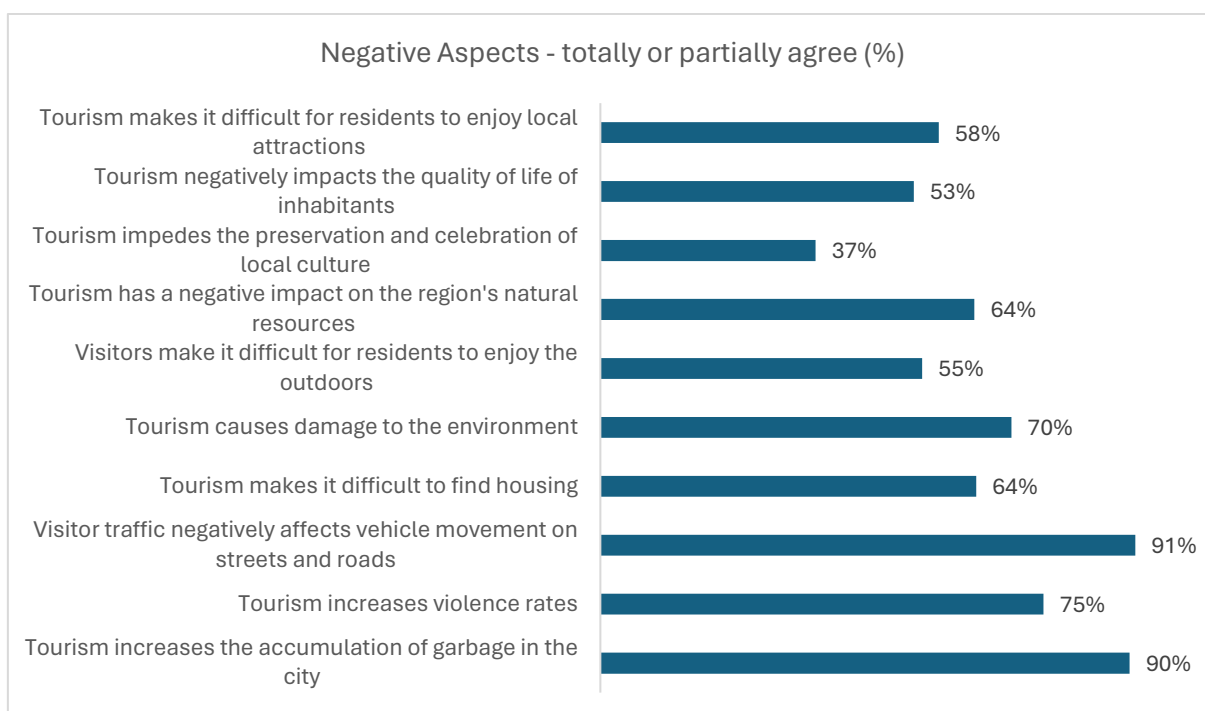
6.1. LOCAL SATISFACTION WITH TOURISM

Ilhabela was unable to obtain a minimum sample for the 2023 perception survey, but the five cities in the North Coast tourist region, where Ilhabela is located, managed a sample of 1,386 responses and CITE chose to consider the regional result.

The great majority of the population of the region considers tourism as beneficial for the city and the population, creating jobs and improving the economy. Despite the positive perception of tourism in the city and region, we still identify problems related to garbage accumulation and excessive traffic among the substantial part of the population.



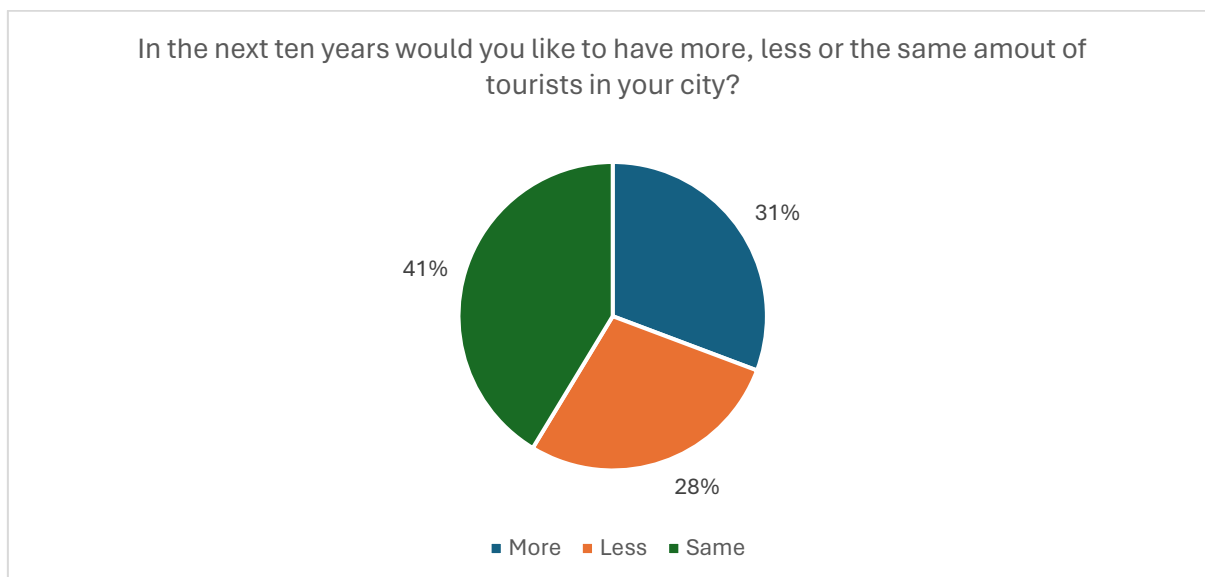
Source: CITE/SETUR-SP



Source: CITE/SETUR-SP

When asked about the volume of tourists in the region in the next ten years, and whether they would like an increase, reduction, or maintenance of this volume of tourists, only 41% of the population would like to see an increase in the current number of tourists

visiting the region. If we look at this assessment for the summer holiday period, all cities in the region would like to see a reduction in the number of tourists.



Source: CITE/SETUR-SP

6.2. SUSTAINABLE DEVELOPMENT GOALS



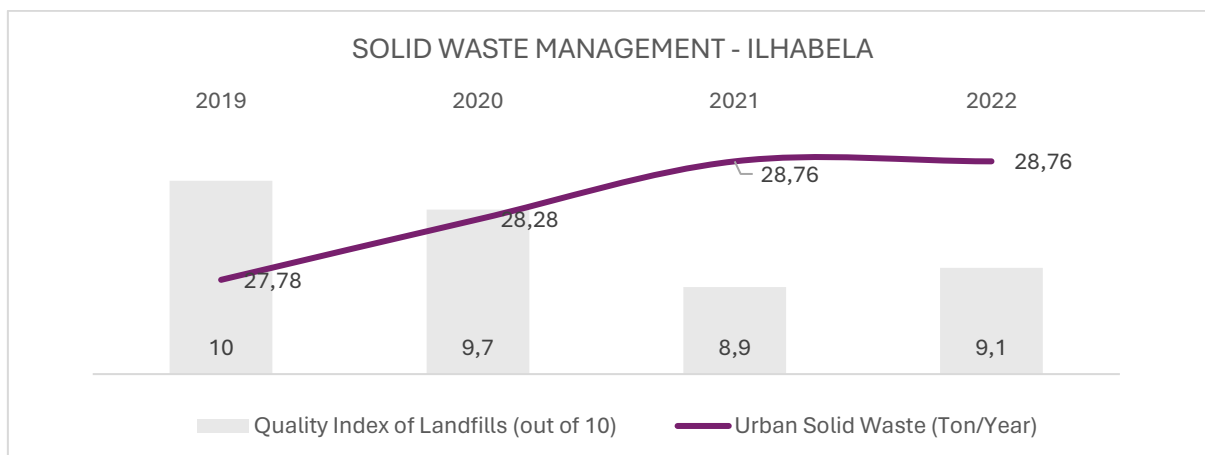
According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Ilhabela is at 58.8%. The city ranks 149th out of 645 municipalities in the state of São Paulo.

Considering the goal of potable water and sanitation, there are still great challenges regarding the population served with sanitary sewage (38.66 of 70). Regarding the goal of decent work and economic growth, there are significant challenges lie ahead, especially unemployment (7.12 of 3).

There are also challenges in the goal of sustainable consumption and production especially regarding the recovery of selectively collected urban solid waste (6.77 of 25.48) and on climate actions there are challenges concerning the proportion of strategies for risk management and prevention of natural disasters (36 of 80).

(Source: Sustainable Development Index of the State of São Paulo - 2020)

6.3. SOLID WASTE MANAGEMENT

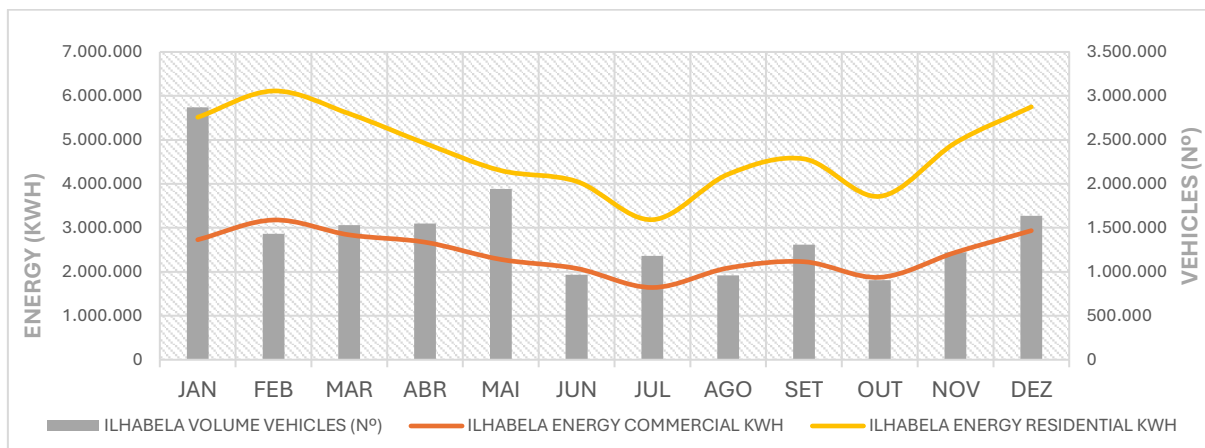


Source: Environmental Company of the State of São Paulo (CETESB)

6.4. ELECTRICITY MANAGEMENT

During the summer holidays and Carnival period (December to February), Ilhabela experiences the highest peaks in energy consumption. February stands out as the month with the highest increase, reaching 29% above the annual average. This increase coincides directly with the influx of tourists, characteristic of many visitors from the state who take advantage of the Carnival holiday at the beach.

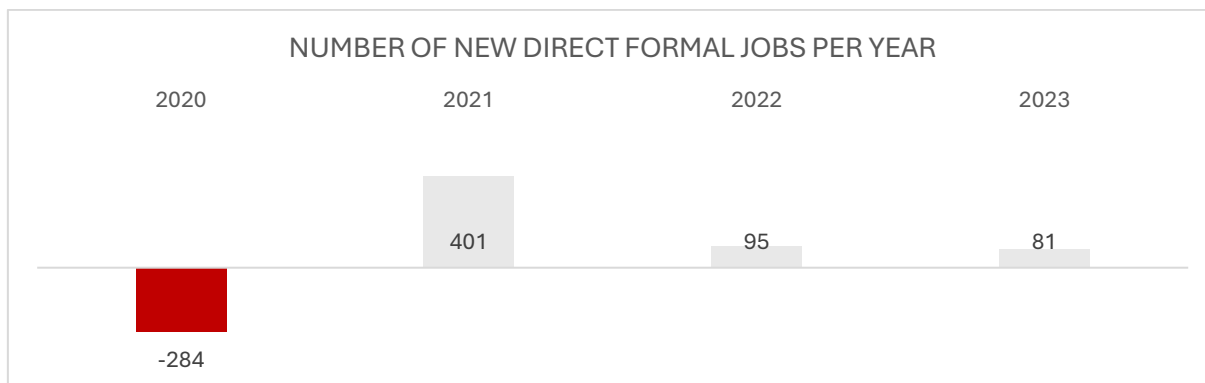
Ilhabela energy consumption 2023 (KWH)



Source: NEOENERGIA

6.5. DIRECT FORMAL JOBS IN TOURISM IN THE CITY OF ILHABELA

The city of Ilhabela currently has 3,006 people formally employed in the tourism-related sectors, which accounts for 26,7% of its occupied population of 11,253 people (IBGE/2021). The year 2023 closed with 81 new direct formal jobs, representing a return to normality after compensation post-pandemic in 2021.

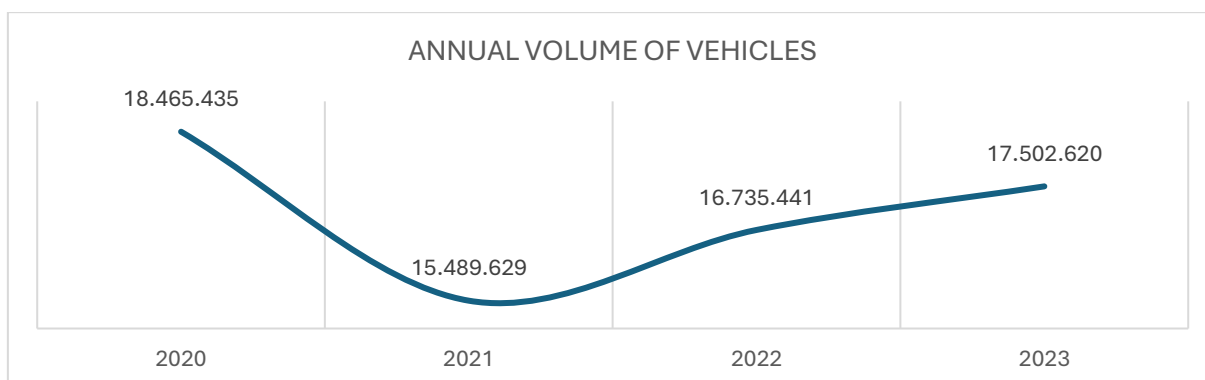


Source: Ministry of Labor, CIET/SETUR-SP

6.6. VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Ilhabela is accessible by three highways coming from the north (neighboring states), west, and south. The 17 million vehicles counted in 2023 do not just refer to the city of Ilhabela but to all five cities on the north coast, which share the same access highways. This region of the state is considered the most important for sun and beach tourism and has the highest flow of tourists in the state looking for beaches or people who own summer homes.

The existence of summer homes or second homes throughout the region justifies the high volume of vehicles during the pandemic period in 2020, when there was an exodus, particularly from the capital, in search of places considered safer.

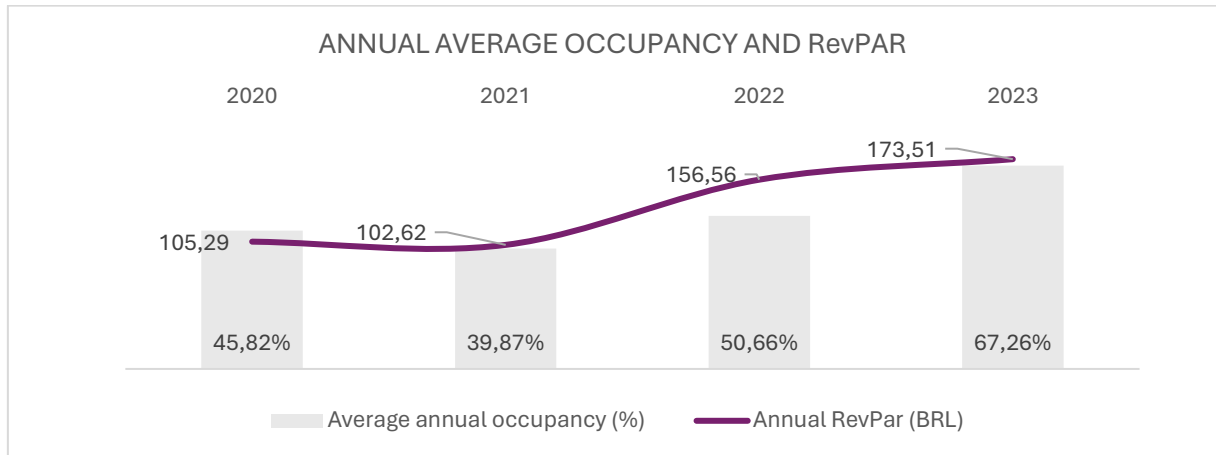


Source: São Paulo State Transportation Agency - ARTESP

6.7. ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism's national registration system for individuals and enterprises in the tourism sector, Ilhabela has 107 accommodation facilities with 1,781 rooms and 526 accessible rooms (which accounts for 30% of the total of rooms), as recorded in December 2023.

The city of Ilhabela showed improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 67.26% and RevPAR of BRL 173.51, representing an increase of 16.6 percentage points in occupancy and +10.8% variation in RevPAR when compared to 2022.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

6.8. NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM

ILHABELA	JANUARY/2023	JANUARY/2024
Camping Sites	1	5
Travel Agencies and Tour Operators	127	124
Show houses and tourist entertainment equipment	9	5
Convention Centers	10	6
Support to Nautical Tourism and Sport Fishing	16	12
Entertainment and Leisure Companies and Water Parks	6	4
Tour Guides	40	46
Car Rental Companies	7	6
Accommodation	109	107
Event Organizers	82	65
Service Provider for Support Infrastructure in Events	40	34
Service Provider Specialized in Tourism Segments	47	38
Restaurants, Cafes, Bars and Similar	34	30
Tourist Carrier	29	31
TOTAL	557	513

Source: Ministry of Tourism

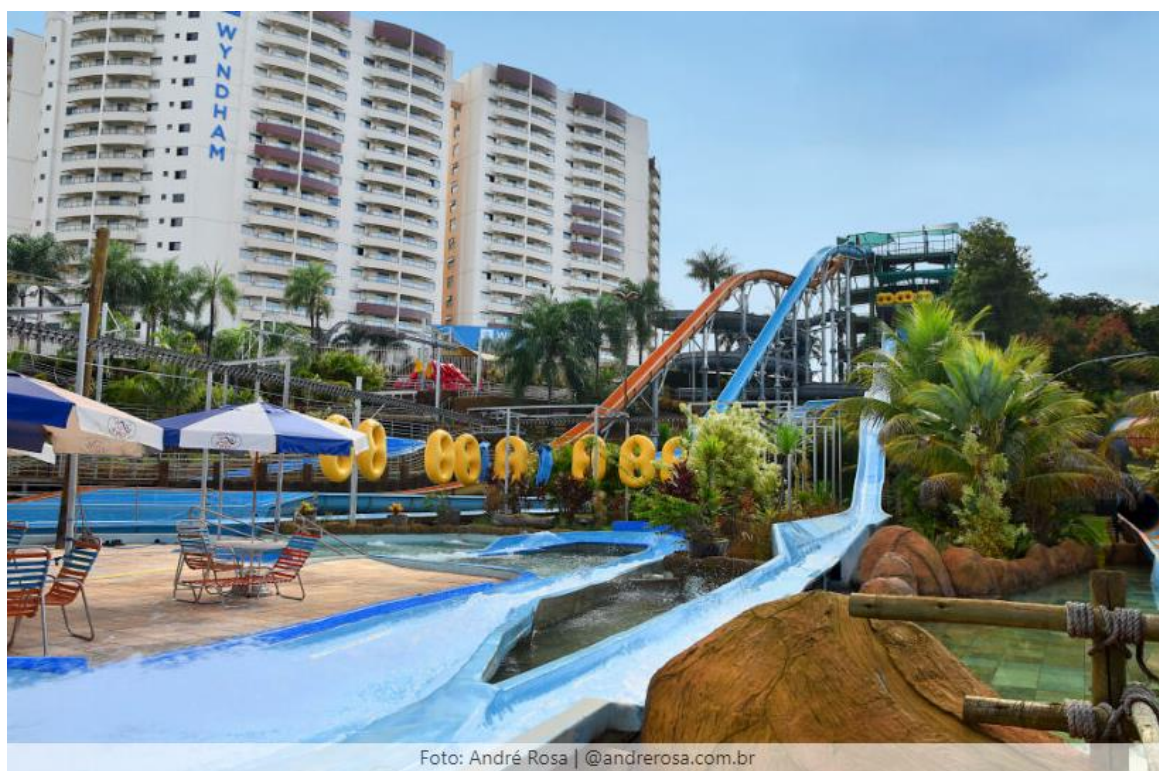
OLÍMPIA

Olímpia occupies an area of 802.5 km², of which 20.3 km² is in the urban perimeter, and its population was estimated at 55,075 inhabitants in 2022 (IBGE/2022). The city is located 450 km from the Capital and is accessible by highways and the airport in the city of São José do Rio Preto, 54 km away.

It is popularly known as the "National Capital of Folklore", for the Folklore Festival, where groups from various states in the country come together to perform typical dances from their regions. Recognized as one of the main tourist destinations in Brazil, tourism is the most important sector of the city's economy, being known nationally and internationally for its thermal waters and for its theme parks and water parks such as “Thermas dos Laranjais” and “Hot Beach”, which annually attract millions of tourists, and which earned the city the title of "Brazilian Orlando".

(Source: Travel and Tourism Secretariat of the State of São Paulo)

According to the local Tourism Observatory (ORTE - Regional Observatory of Tourism and Events), the city of Olímpia received 4.8 million tourists in 2023, which represents 41.2% more than in 2022. These numbers may be even higher since they are data collected from the city's hotel network, which does not inform the volume of day-use visitors.

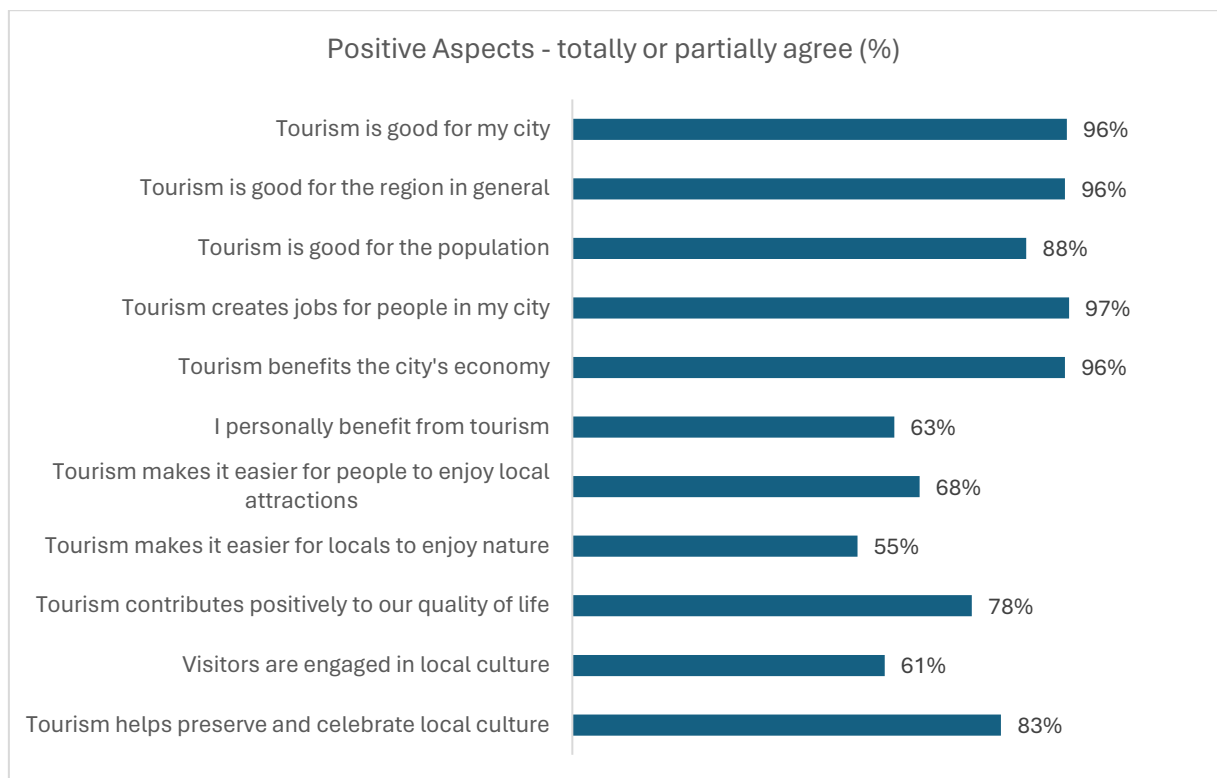


Whydam Olímpia Royal Resort – photo by André Rosa

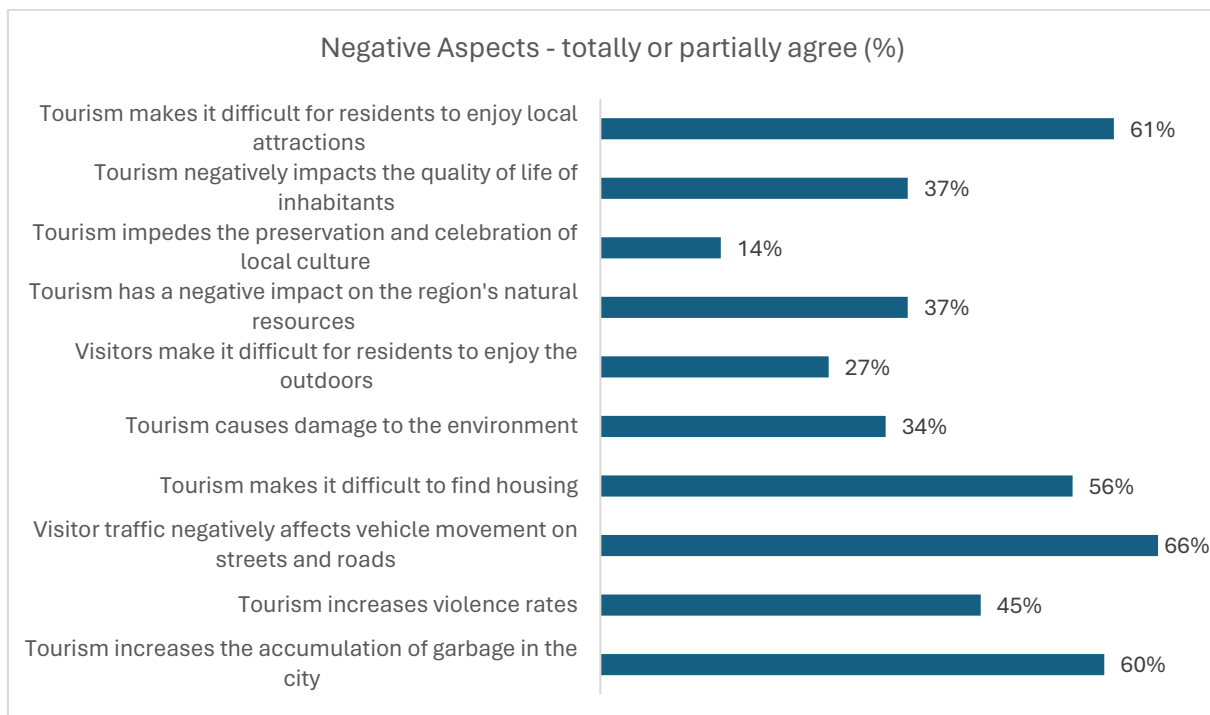
7.1. LOCAL SATISFACTION WITH TOURISM

Olímpia had 265 residents participating in the tourism perception survey realized at the end of 2023. For the survey to be a success, local stakeholders must be involved for the duration of the survey. The results, released at the beginning of the year, are used by local managers in the construction of their annual municipal tourism plans.

The population of Olímpia considers tourism as beneficial for the city and the population, creating jobs and improving the economy. A considerable portion also believes that tourism helps preserve and celebrate the local culture. There are aspects of the accumulation of garbage and traffic, but not at the same level as other cities since the main hotel chains and parks are on the outskirts of the city and tourists spend little time in the city itself.

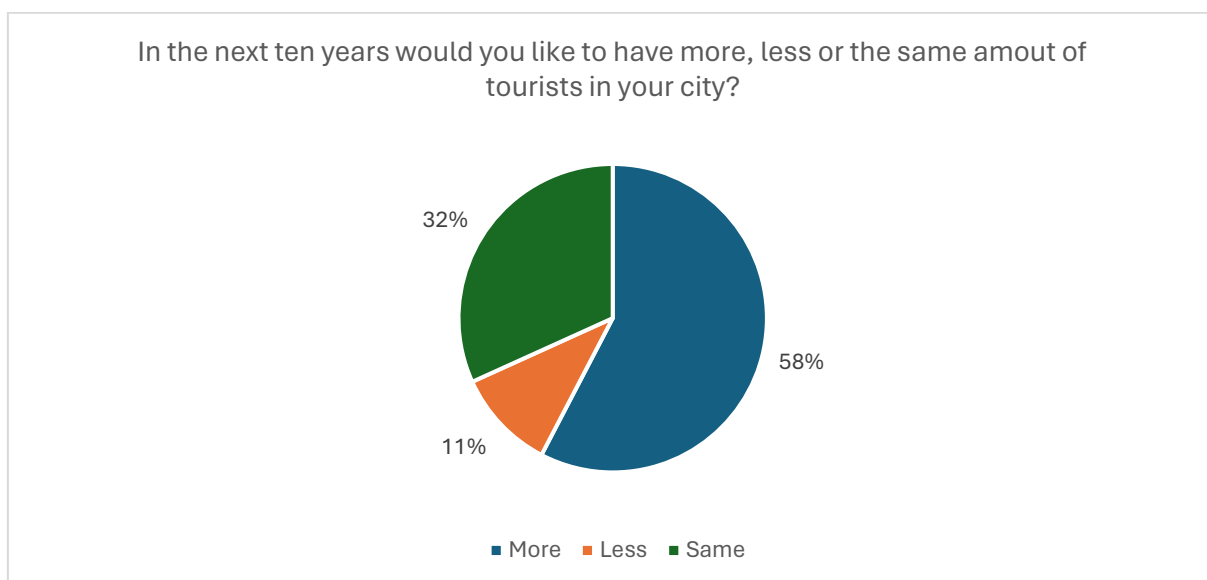


Source: CITE/SETUR-SP



Source: CITE/SETUR-SP

When asked about the volume of tourists in the city in the next ten years, and whether they would like an increase, reduction, or maintenance of this volume of tourists, 58% of the population of Olímpia would like to see an increase in the current number of tourists visiting the city.



Source: CITE/SETUR-SP

7.2. SUSTAINABLE DEVELOPMENT GOALS



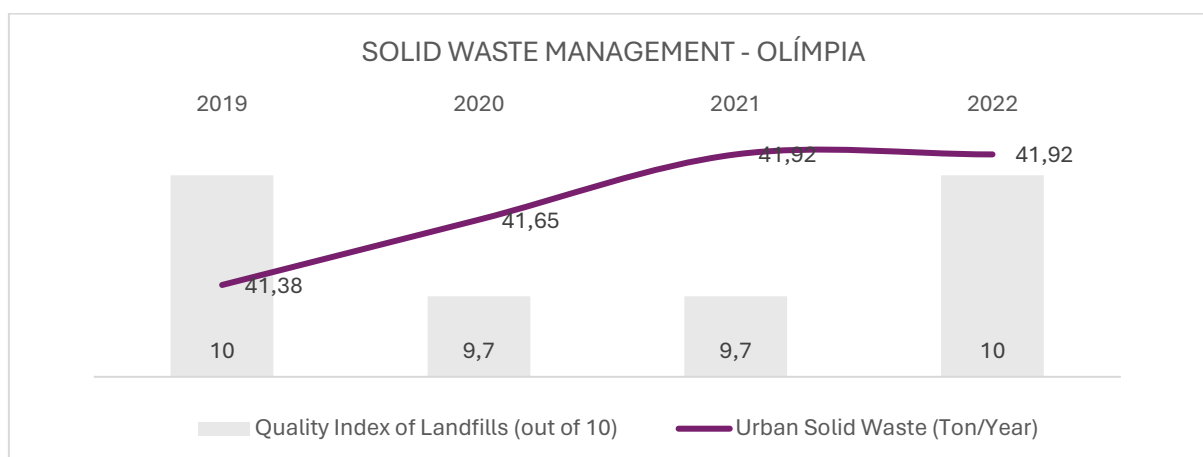
According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Olímpia is at **54.4**, highlighting the objective of renewable and affordable energy and industry, innovation, and infrastructure that have already been achieved. The city ranks 459th out of 645 municipalities in the state of São Paulo.

Considering the goal of potable water and sanitation, there are still challenges regarding water loss in distribution (21 of 12.1). Regarding the goal of decent work and economic growth, there are significant challenges to overthrow, especially in youth unemployment (11.41 of 5.18).

There are also great challenges in the goal of sustainable consumption and production, especially regarding the recovery of selectively collected urban solid waste (0.22 out of 25.48) and population served with selective collection (0 out of 70). On the goal of climate actions, there are great challenges to CO²e emissions per capita (4.13 of 2).

(Source: Sustainable Development Index of the State of São Paulo - 2020)

7.3. SOLID WASTE MANAGEMENT



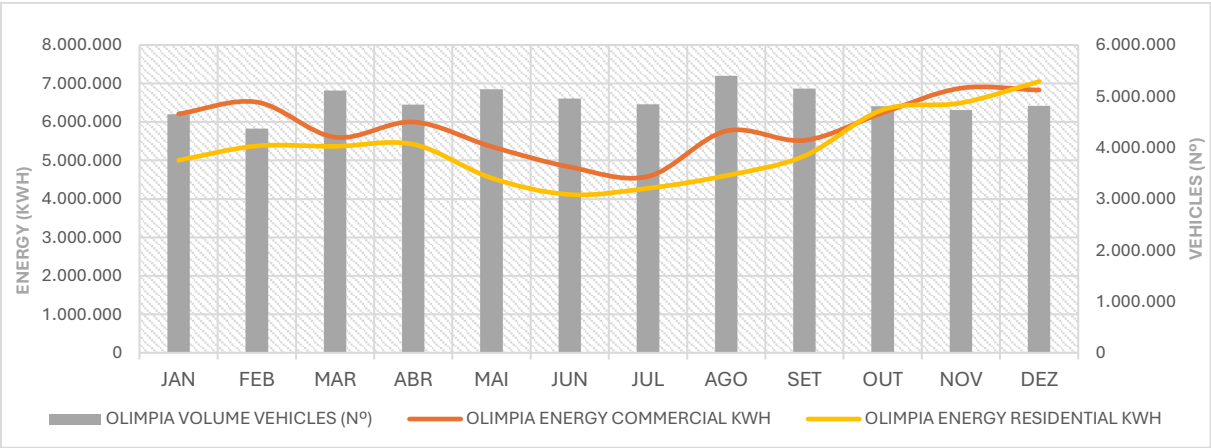
Source: Environmental Company of the State of São Paulo (CETESB)

7.4. ELECTRICITY MANAGEMENT IN 2023

The energy consumption in Olímpia shows a notable increase between the months of October and December, reaching its peak during the year-end holiday season. In

December, this increase reached 24% above the annual average. The city, known for its tourist attractions such as hotels and thermal parks, significantly contributes to this rise due to the additional demand for energy during the high season. It's worth noting that commercial energy consumption is similar to residential consumption, owing to the large number of commercial establishments catering to tourism, especially hotels and thermal parks.

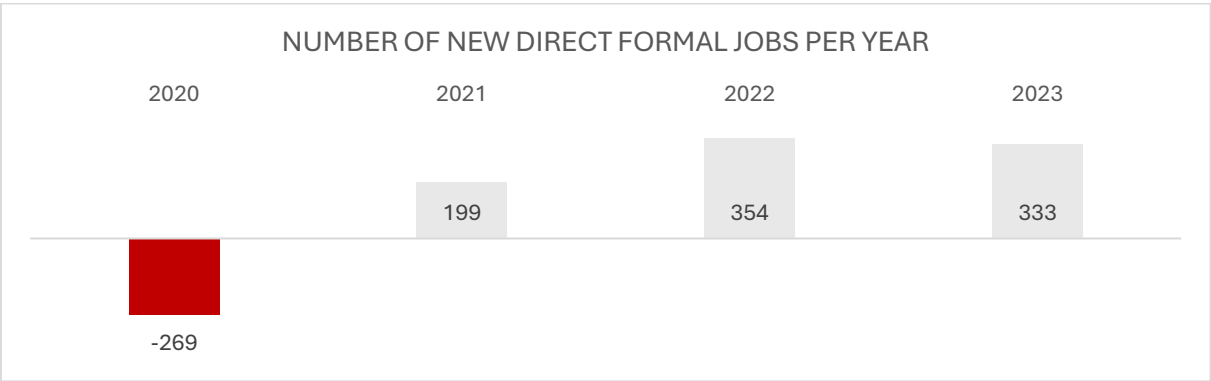
Olímpia energy consumption 2023 (KWH)



Source: CPFL

7.5. DIRECT FORMAL JOBS IN TOURISM IN THE CITY OF OLÍMPIA

The city of Olímpia currently has 3,477 people formally employed in the tourism-related sectors, which accounts for 18% of its occupied population of 19,354 people (IBGE/2021). The year 2023 closed with 333 new direct formal jobs, representing a return to normality after compensation post-pandemic in 2021 and consistent growth.

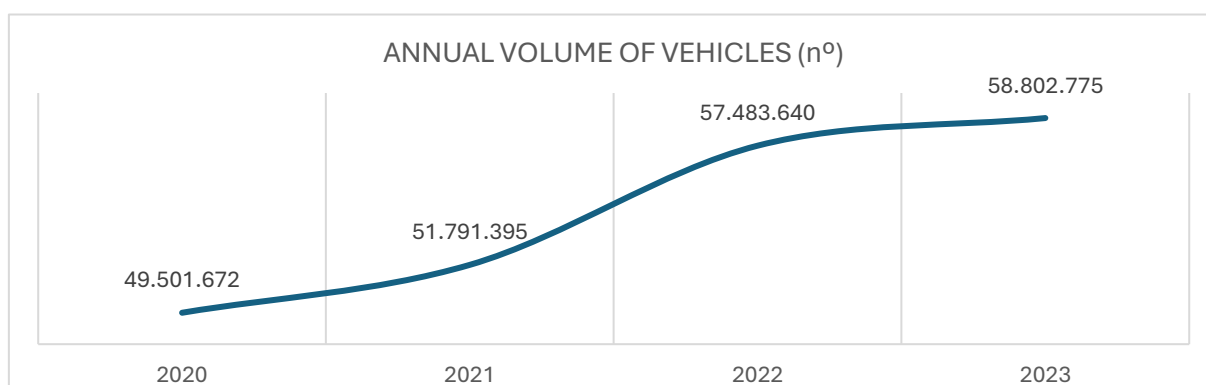


Source: Ministry of Labor, CITE/SETUR-SP

7.6. VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Olímpia is crossed by two highways coming from the north, south, east, and west of the state. It can be reached by road using cars (private or rented and buses) and the São José do Rio Preto airport is 63 km away. The movement of 58.8 million vehicles on the access roads to Olímpia in 2023 is 2,3% bigger than in 2022. On weekends (Friday to Sunday) there were 3.581.622 vehicles, which represents 44% of the total number of vehicles circulating on the access roads during the year.

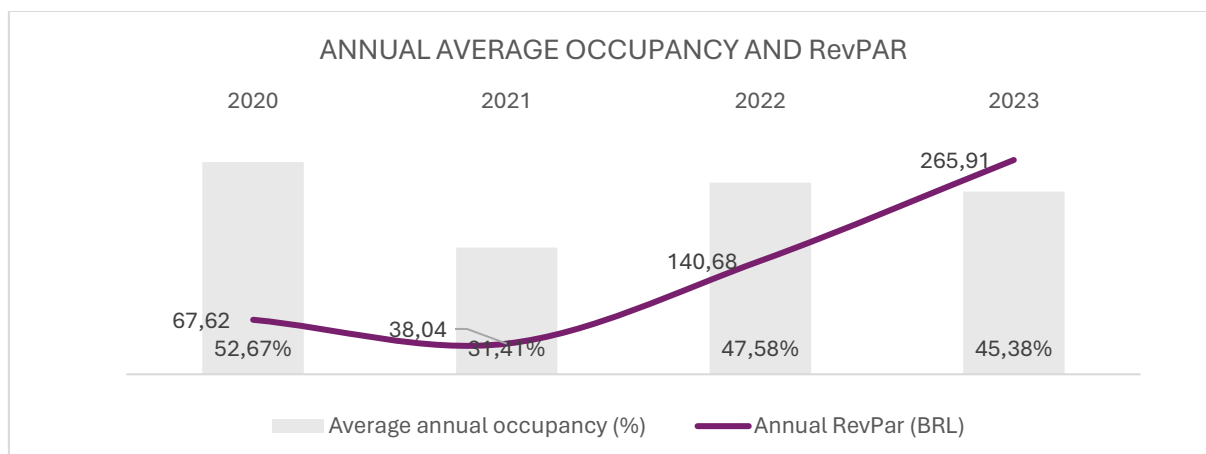
Source: São Paulo State Transportation Agency - ARTESP



7.7. ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism's national registration system for individuals and enterprises in the tourism sector, Olímpia has 39 accommodation facilities with 4,849 rooms and 1,261 accessible rooms (which accounts for 26% of the total of rooms), as recorded in December 2023.

The city of Olímpia showed improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 45.38% and RevPAR of BRL 265.91. Despite the drop of 2.2 percentage points in the average occupancy rate compared to 2022, the increase in the average value of tariffs generated an 89% increase in RevPAR in the 2022 x 2023 comparison.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

7.8. NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM

OLÍMPIA	JANUARY/2023	JANUARY/2024
Travel Agencies and Tour Operators	50	65
Entertainment and Leisure Companies and Water Parks	2	2
Tour Guides	9	9
Car Rental Companies	2	1
Accommodation	40	39
Event Organizers	3	3
Theme Parks	2	1
Service Provider for Support Infrastructure in Events	3	2
Service Provider Specialized in Tourism Segments	4	9
Restaurants, Cafes, Bars and Similar	10	12
Tourist Carrier	6	7
TOTAL	131	150

Source: Ministry of Tourism

7. RIBEIRÃO PRETO

The city is approximately 315 km from the Capital and 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.

In addition to its economic importance, the municipality is an important center for health, education, research, business tourism, and culture in Brazil. Mayor Luiz Roberto Jábali Park, Maurílio Biagi Park, and the Municipal Zoo are important areas for environmental preservation, recreation, and tours, while Pinguim Beer House, Pedro II Theater, and the Café Museum are relevant points of cultural activities and visits by tourists. The city has a relevant music festival, João Rock, and two major events (fairs), the Ribeirão Preto National Book Fair and the traditional and famous Agrishow, responsible for nacional and internacional public / Attracting nacional and internacional public.

(Source: Travel and Tourism Secretariat of the State of São Paulo)

The Ribeirão Preto Department of Culture and Tourism is responsible for organizing events that take place in the city. According to information, in 2023 there were more than 15 events and around 20 musical performances with international and national artists that attracted audiences from the city and nearby regions. In 2023 generated more than 13.2 billion reais in trades, attracting a public (national and international) of almost 200 thousand visitors.

Among the highlights, we find Agrishow, which is considered one of the largest agricultural fairs in the world and the largest agricultural fair in Brazil. Agrishow brings together solutions for all types of crops, harvests, machines, and property sizes, in addition to being recognized as the stage for the launch of the main trends and innovations for agribusiness. In its 29th edition, in 2023, the fair brought together more than 800 exhibiting brands and more than 195 thousand qualified visitors across an area of 530,000 m².

Another major event in the city was the Ribeirão Preto International Book Fair, which attracted an audience of 253,000 people over 10 days in 16 locations in the city. In total, there were around 100 hours of free, in-person programs.

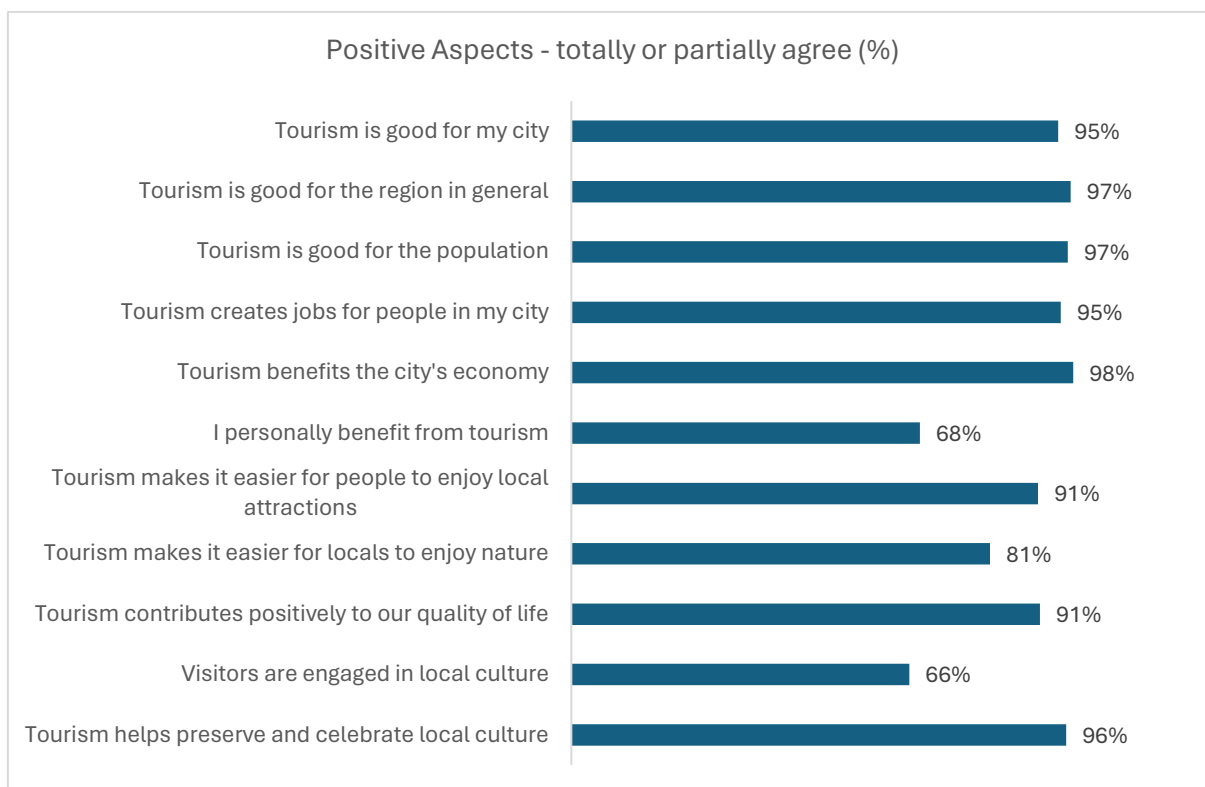


“Quarteirão Paulista” – photo by SETUR-SP

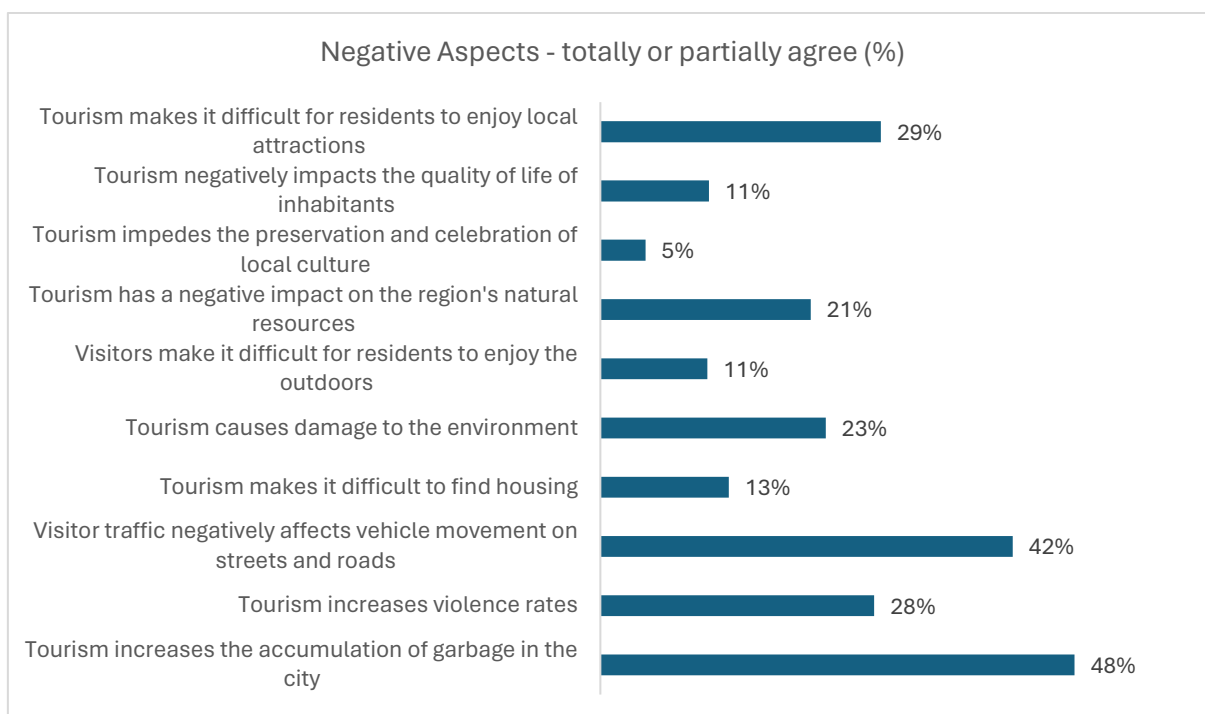
8.1. LOCAL SATISFACTION WITH TOURISM

Ribeirão Preto had 587 residents participating in the tourism perception realized at the end of 2023. For the survey to be a success, local stakeholders must be involved for the duration of the survey. The results, released at the beginning of the year, are used by local managers in the construction of their annual municipal tourism plans.

The great majority of the population of Ribeirão Preto considers tourism as beneficial for the city and the population, creating jobs and improving the economy. They also believe that tourism preserves and celebrates local culture. Of all the monitored cities, Ribeirão Preto, together with Aparecida, is the one with the best perception of the impacts of tourism, with a high proportion of the population agreeing to almost all the positive aspects and a low proportion agreeing to the negative aspects.



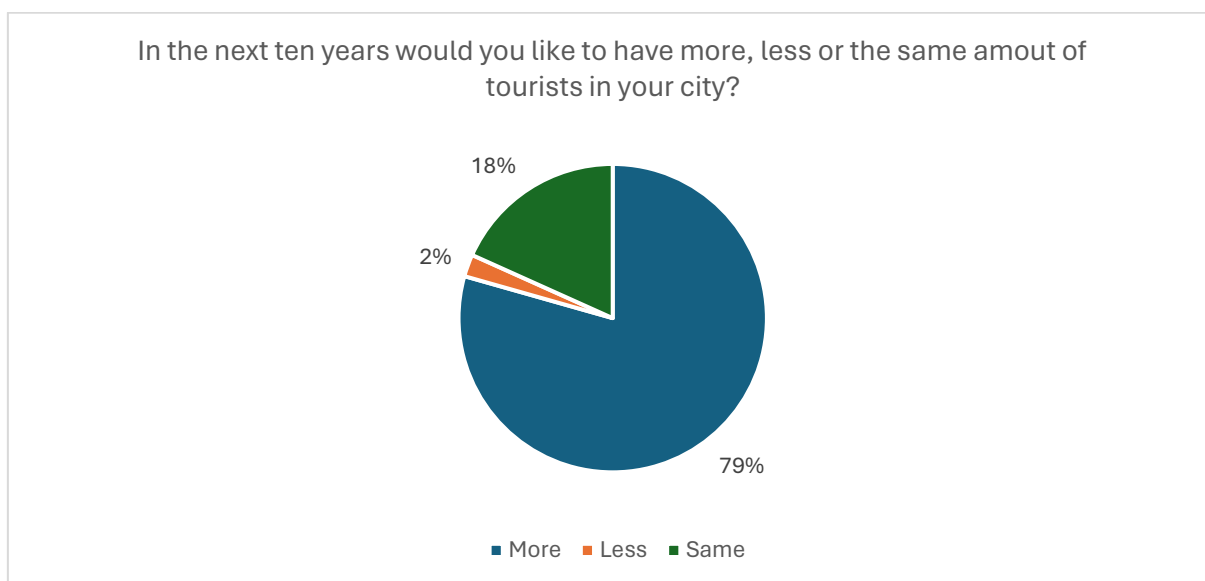
Source: CITE/SETUR-SP



Source: CITE/SETUR-SP

When asked about the volume of tourists in the region in the next ten years, and whether they would like an increase, reduction, or maintenance of this volume of tourists, 79% of

the population would like to see an increase in the current number of tourists visiting the region, which confirms that tourism is well seen and expected in the city and that the municipality is doing a good job on it.



Source: CITE/SETUR-SP

8.2. SUSTAINABLE DEVELOPMENT GOALS



According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Ribeirão Preto is at **60.3**, highlighting the objectives of clean and affordable energy, industry, innovation and infrastructure, and life in the water that have already been achieved. The city ranks 80th out of 645 municipalities in the state of São Paulo.

Considering the goal of potable water and sanitation, there are still great challenges regarding water loss in distribution (49.06 of 12.1). Regarding the goal of decent work and economic growth, there are challenges to be overcome in almost all areas, like youth unemployment (9.44 of 5.18), employed population between 10 and 17 years old (12.6 of 7.59), unemployment (5.17 of 3), young people aged 15 to 24 who do not study or work (15.79 of 14.76) and occupation of people aged 16 or over (67.37 of 68.19). There are also great challenges in the goal of sustainable consumption and production, especially regarding the recovery of selectively collected urban solid waste (0.37 out of 25.48)

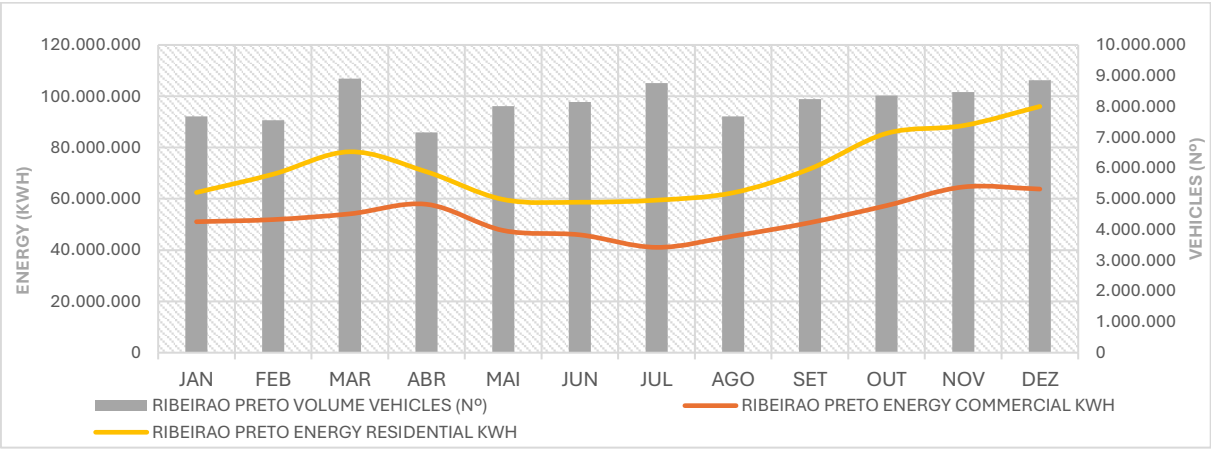
Concerning climate actions there are challenges in the proportion of strategies for risk management and prevention of natural disasters (56 of 80).

(Source: Sustainable Development Index of the State of São Paulo - 2020)

8.3. ELECTRICITY MANAGEMENT

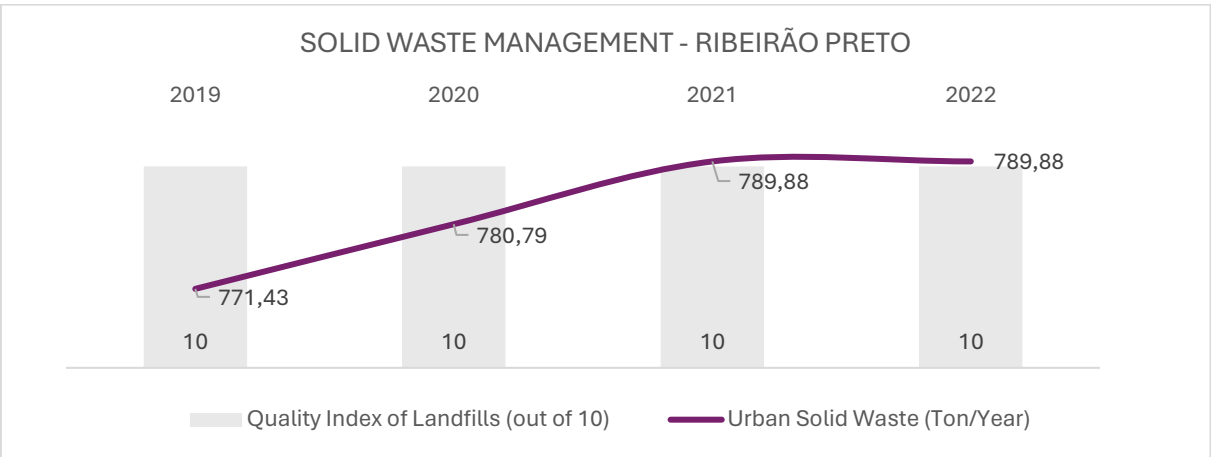
The energy consumption in Ribeirão Preto experiences an increase between November and December, reaching its peak during the year-end holiday season. In December, this increase reached 28% above the annual average.

Ribeirão Preto energy consumption 2023 (KWH)



Source: CPFL

8.4. SOLID WASTE MANAGEMENT

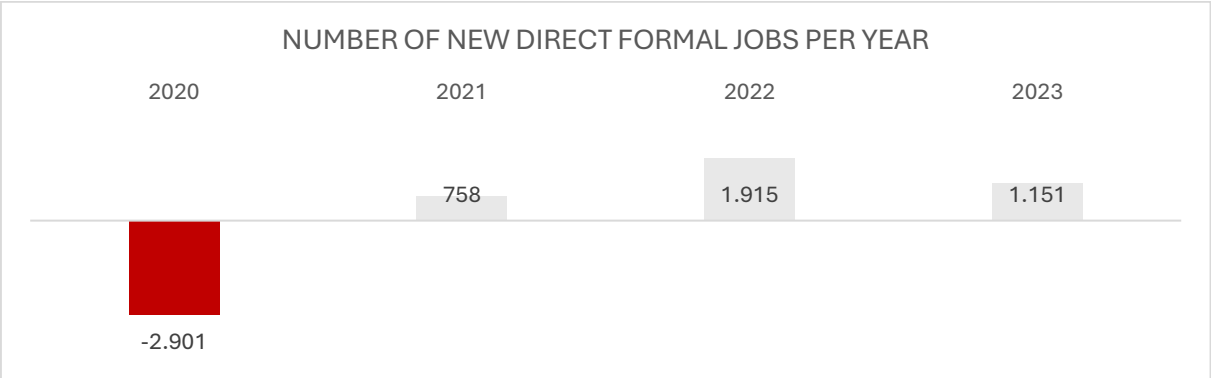


Source: Environmental Company of the State of São Paulo (CETESB)

8.5. DIRECT FORMAL JOBS IN TOURISM IN THE CITY OF RIBEIRÃO PRETO

The city of Ribeirão Preto currently has 19,840 people formally employed in the tourism-related sectors, which accounts for 7% of its occupied population of 283,614 people (IBGE/2021). The year 2023 closed with 1,151 new direct formal jobs, which, together with

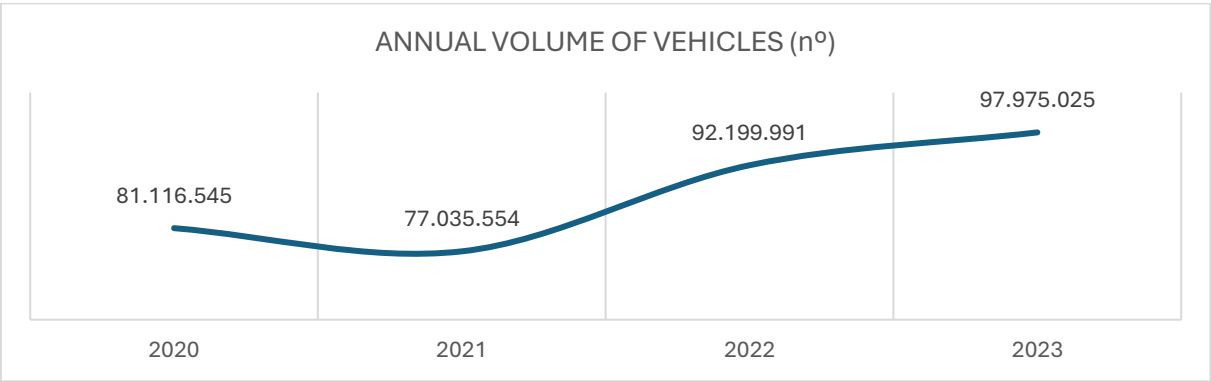
the previous years, compensated for the losses during the pandemic in but did not show considerable growth beyond it.



Source: Ministry of Labor, CIET/SETUR-SP

8.6. VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Ribeirão Preto is accessible by eight roads or highways. The movement of 98 million vehicles on the access roads to the city in 2023 is 6.5% bigger than in 2022. On weekends (Friday to Sunday) there were 3.581.622 vehicles, which represents 44% of the total number of vehicles circulating on the access roads during the year.

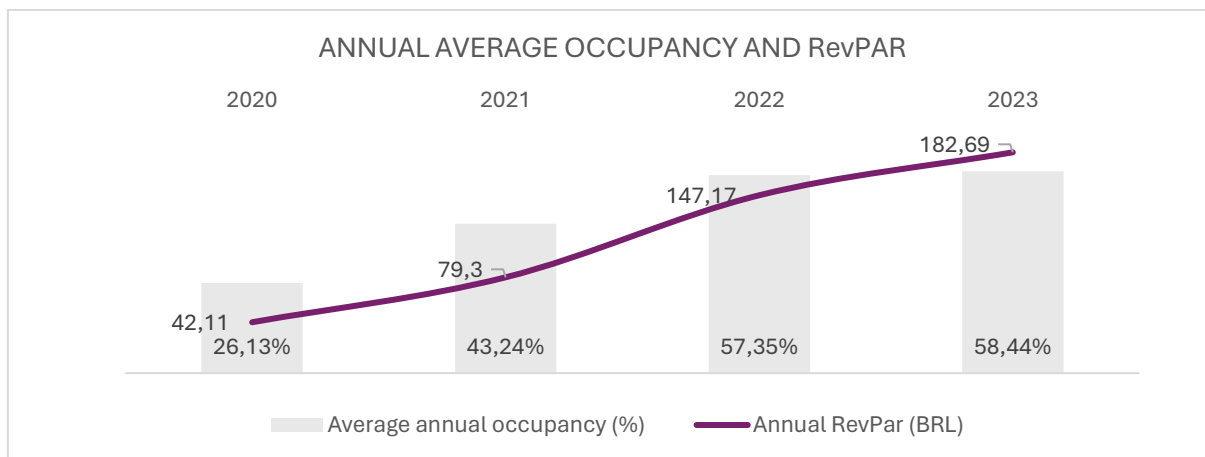


Source: São Paulo State Transportation Agency – ARTESP

8.7. ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism’s national registration system for individuals and enterprises in the tourism sector, Ribeirão Preto has 30 accommodation facilities with 4,186 rooms and 421 accessible rooms (which accounts for 10% of the total of rooms), as recorded in December 2023.

The city of Ribeirão Preto showed improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 58.44% and RevPAR of BRL 182.69, representing an increase of 1.09 percentage points in occupancy and +24.1% variation in RevPAR when compared to 2022.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

8.8. NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM

RIBEIRÃO PRETO	JANUARY/2023	JANUARY/2024
Travel Agencies and Tour Operators	223	259
Convention Centers	0	2
Support to Nautical Tourism and Sport Fishing	1	1
Entertainment and Leisure Companies and Water Parks	4	4
Tour Guides	35	35
Car Rental Companies	20	16
Accommodation	26	30
Event Organizers	32	41
Theme Parks	2	2
Service Provider for Support Infrastructure in Events	16	12
Service Provider Specialized in Tourism Segments	26	22
Restaurants, Cafes, Bars and Similar	123	100
Tourist Carrier	56	52
TOTAL	564	576

Source: Ministry of Tourism

8. SANTOS

Located on the coast and 70 km from the Capital, Santos is home to the largest port in Latin America, which is mainly responsible for the city's economic dynamics alongside tourism, fishing, and commerce. It occupies 5th place among the most important non-capitals for the Brazilian economy and 10th place according to quality of life.

Santos had, for a long time, its economy centered on the commercialization of coffee and in 1922 the Official Coffee Exchange was inaugurated, where wealth from the coffee market for the country was traded. The Exchange Market today houses the Coffee Museum, a space that promotes exhibitions about the product's history throughout Brazil and the city and is decorated with works by a nationally famous artist from the city, Benedito Calixto.

The most populous city on the coast of São Paulo, the city's main attraction is its 7 km of beach. The Book of Records places the Santos Waterfront Gardens as forming the largest beachfront garden in length in the world. The preservation and care for the flora of the Santos beach environment, permeated with palm and almond trees, are the result of joint work by the region's environmental departments, often linked to universities or scientific institutions. Santos has a population of 418,618 inhabitants (IBGE/2022).

(Source: Travel and Tourism Secretariat of the State of São Paulo)



Santos Waterfront – photo by SETUR-SP

In 2023, the Secretariat of Entrepreneurship, Creative Economy, and Tourism (SEECTUR) of Santos carried out several efforts and reaped many positive results. The year 2023 was historic for tourism in Santos. The Tourism group's ISS collection broke a record and was 171% higher than the previous year. The hotel chain recorded the best occupancy average since 2014. Tourism provided Santos with more than BRL 13.7 million in ISS, a record in the historical series, which began to be calculated by the Santos Tourism Observatory in 2018, based on reports collected by the municipality's Finance Department.

The cruise season, which ended in April 2023, recorded the biggest movement at the Port of Santos in the last ten years, with around 450 thousand passengers at the city's cruise terminal and injecting more than BRL 400 million into the local economy. The hotels confirm the trend of tourism growth in the city. The average accommodation rate in 2023 was 58.42%. This is the best number since 2014 and an increase of 5% compared to 2022. If compared to the period before the pandemic (2019), the increase reaches 18%.

The summer season, ending in March 2023, was the best since 2016, with more than 2.6 million tourists in the city.

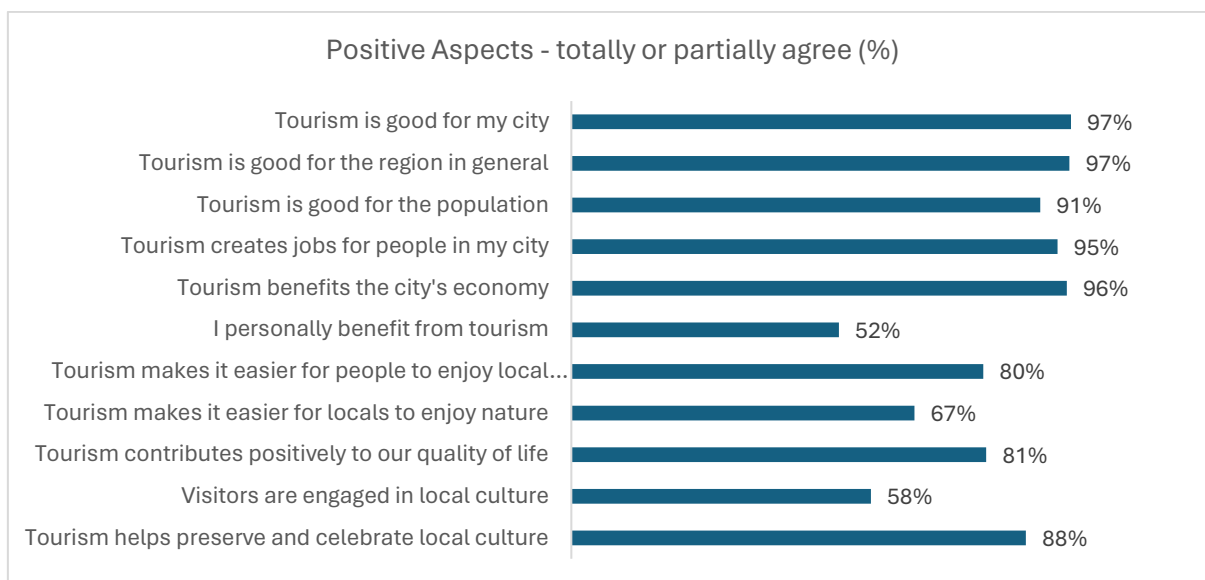
2023 was a very favorable year for tourism, also due to the long holidays distributed throughout the year, the average for the hotel chain reached 63% and a total of 3.4 million tourists chose the city to spend their long holidays.

The positive numbers are the result of many actions accomplished by the city hall, integrating the creative economy, revitalization actions in the Historic Center, and events. The festivals held in the Historic Center registered the participation of 442 thousand people in 2023. SEECTUR also participated in various actions at trade, tourism, and business fairs to increasingly promote the destination as a differentiated product.

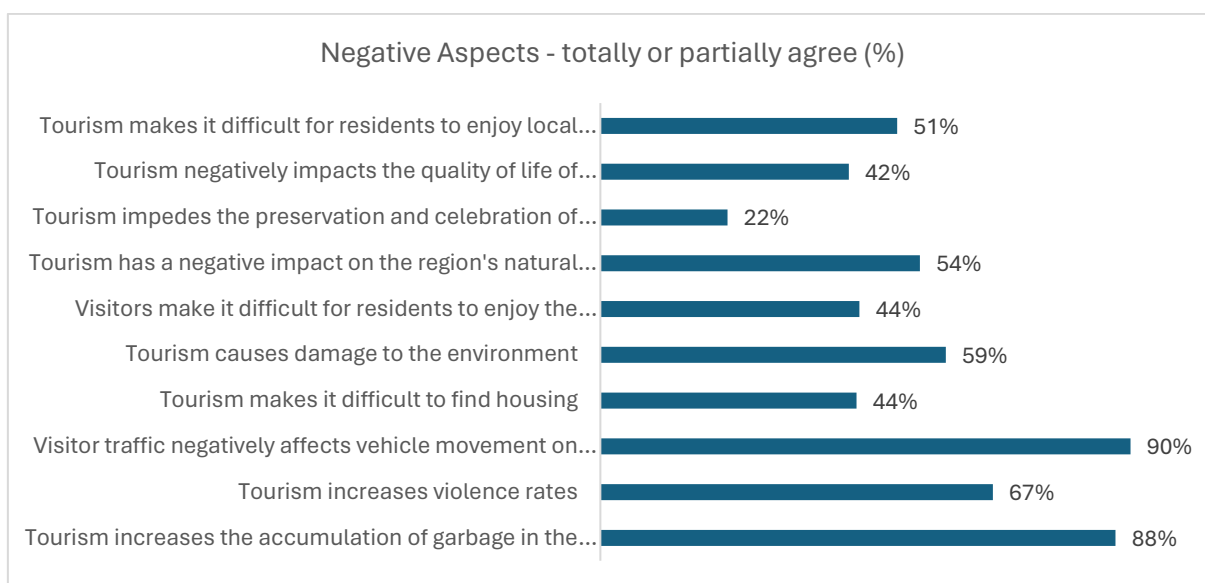
9.1. LOCAL SATISFACTION WITH TOURISM

Santos had 388 residents participating in the tourism perception survey carried out at the end of 2023. For the survey to be a success, local stakeholders must be involved for the duration of the survey. The results, released at the beginning of the year, are used by local managers in the construction of their annual municipal tourism plans.

The great majority of the population of Santos consider tourism as beneficial for the city and the population, creating jobs and improving the economy. They also believe that tourism preserves and celebrates local culture. Following the trend in other cities, the accumulation of garbage and intense vehicle traffic are considered problems generated by tourists, in the view of the population of Santos.



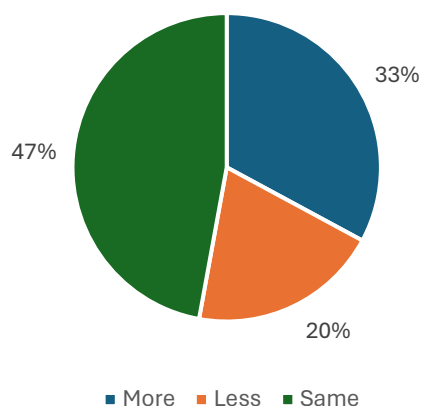
Source: CITE/SETUR-SP



Source: CITE/SETUR-SP

When asked about the volume of tourists in the region in the next ten years, and whether they would like an increase, reduction, or maintenance of this volume of tourists, 47% of the population would like to see an increase in the current number of tourists visiting the region and only 25.32% of its population would like more tourists in the city during summer holidays, like most cities on the coast.

In the next ten years would you like to have more, less or the same amount of tourists in your city?



Source: CITE/SETUR-SP

9.2. SUSTAINABLE DEVELOPMENT GOALS



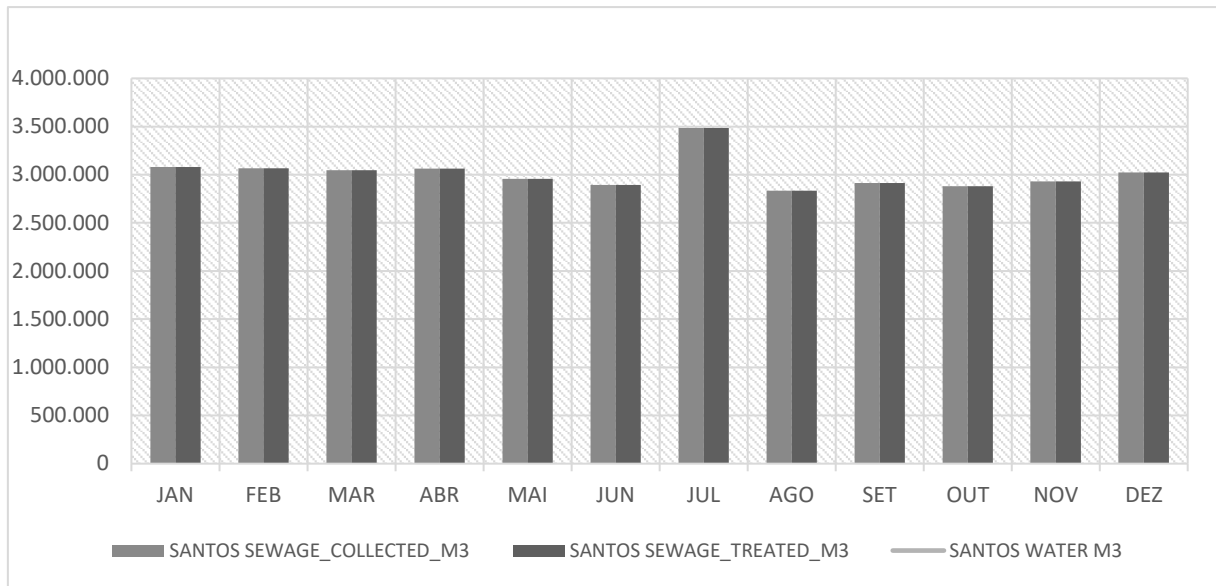
According to the Sustainable Development Index of the State of São Paulo (2020), the sustainable development goal of Santos is at **63.1**, highlighting the objectives of clean and affordable energy, industry, innovation and infrastructure, life in the water, and action against global climate change that have already been achieved. The city ranks 15th out of 645 municipalities in the state of São Paulo.

Considering the goal of potable water and sanitation, there are still challenges regarding water loss in distribution (14 of 12.1). Regarding the goal of decent work and economic growth, there are significant challenges to be overcome in youth unemployment (15.64 of 5.18), and unemployment (7.85 of 3). There are also significant challenges in the goal of sustainable consumption and production especially regarding recovery of selectively collected urban solid waste (4.52 out of 25.48).

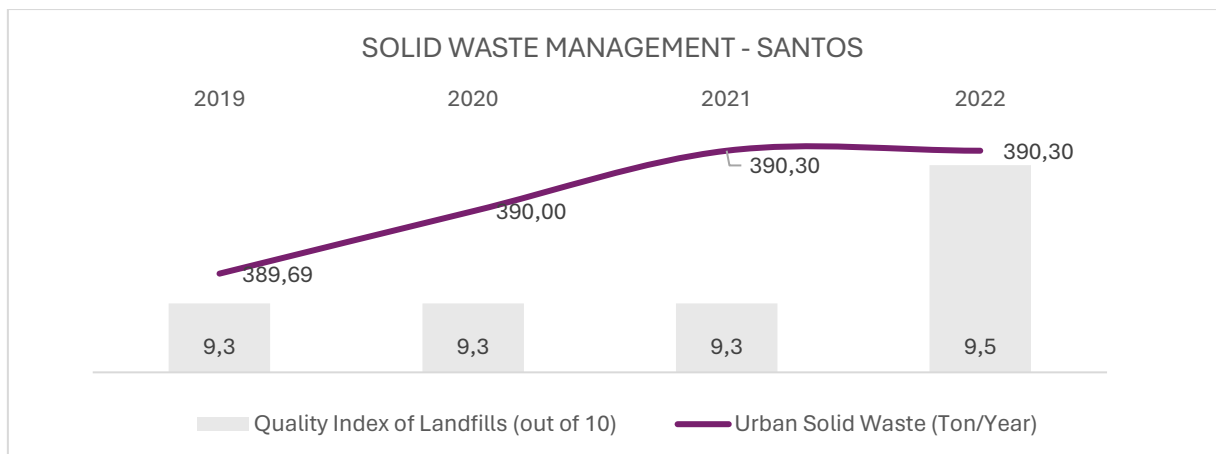
9.3. SEWAGE MANAGEMENT

Santos is equipped with a sewage collection and treatment system to address the needs of its population, effectively treating 100% of the collected sewage. The city didn't provide information about water consumption.

Santos sewage collected and sewage treated 2023 (m³)



9.4. SOLID WASTE MANAGEMENT

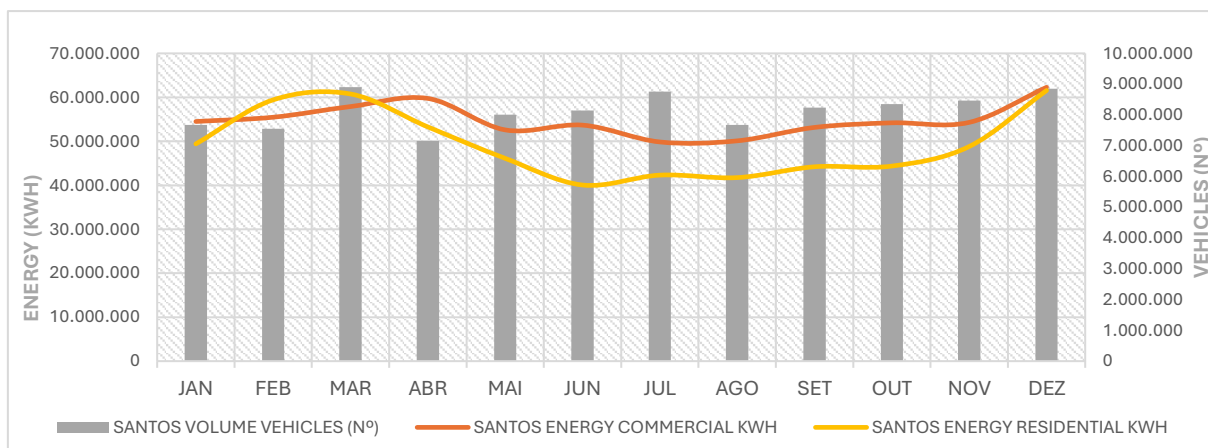


Source: Environmental Company of the State of São Paulo (CETESB)

9.5. ELECTRICITY MANAGEMENT

In 2023, Santos experienced a notable surge in energy consumption in December, marking a 19% increase compared to the annual average. This coincided with the peak of tourist influx, driven by year-end festivities. During these months, the city welcomes numerous visitors seeking leisure and entertainment, leading to a significant demand for services and infrastructure, including water consuming for accommodation, food, and recreational activities.

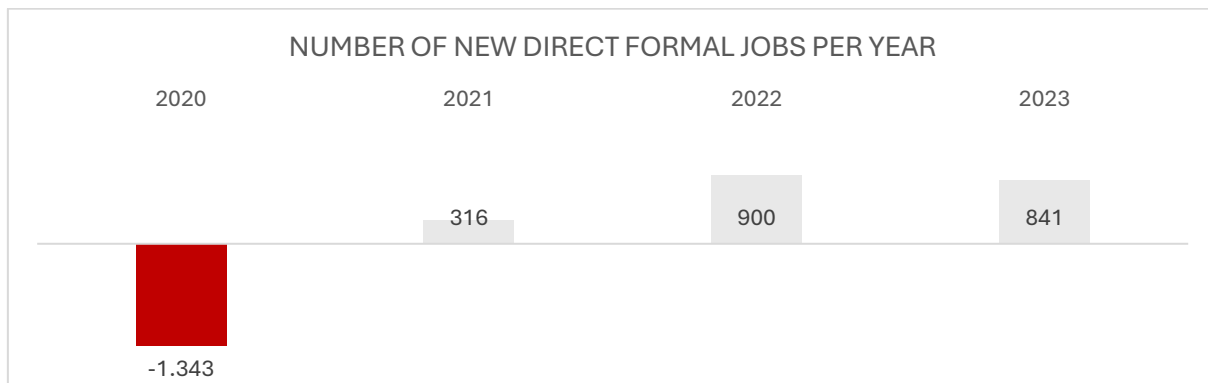
Santos energy consumption 2023 (KWH)



Source: CPFL

9.6. DIRECT FORMAL JOBS IN TOURISM IN THE CITY OF SANTOS

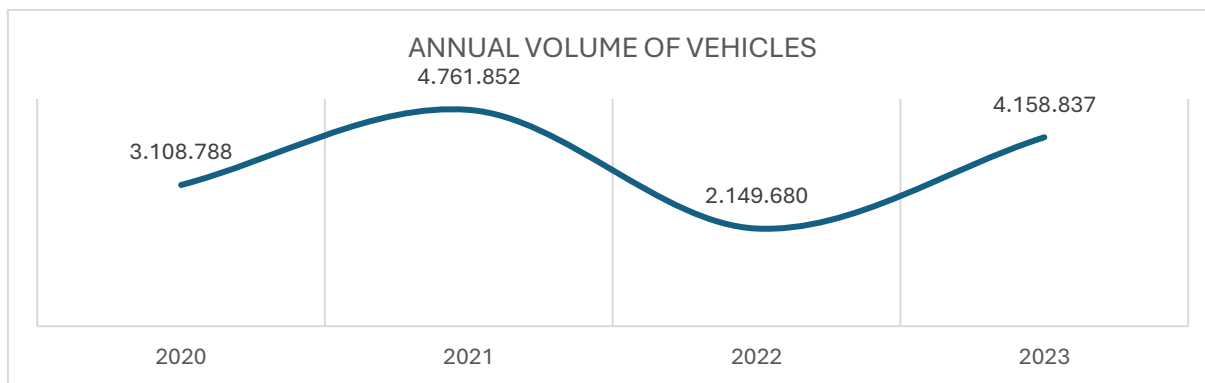
The city of Santos currently has 12,707 people formally employed in the tourism-related sectors, which accounts for 6.2% of its occupied population of 204,937 people (IBGE/2021). The year 2023 closed with 841 new direct formal jobs, which, together with the previous years, compensated for the losses during the pandemic and showed a slight growth.



Source: Ministry of Labor, CIET/SETUR-SP

9.7. VOLUME OF COMMERCIAL AND PASSENGER VEHICLES ON ROAD ACCESSES

Santos is accessible mainly by Imigrantes Highway, which is one of the most important highways of the state, connecting the coast to the countryside. Due to malfunctions in traffic sensors in the region, CITE had to obtain data from another source, in this case, the highway concessionaire itself - Ecovias, through the Santos Observatory. The numbers recorded here refer only to vehicle arrivals in the city and not vehicle flow. We can observe that the movement of 4.1 million vehicles on the access roads to Santos in 2023 is almost double the recorded in the previous year.



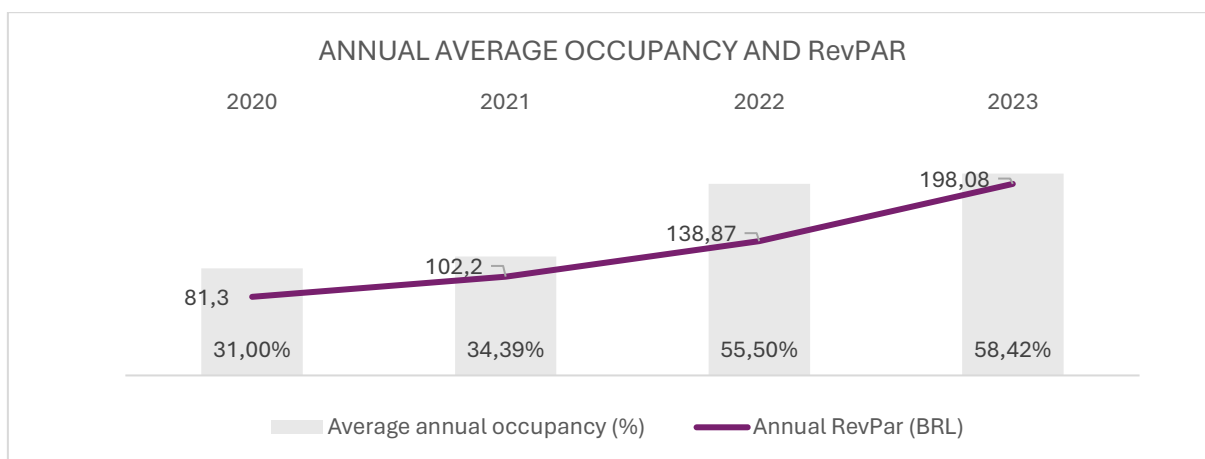
Source: São Paulo State Transportation Agency – ARTESP

9.8. ACCOMMODATION SECTOR

According to the Brazilian Ministry of Tourism's national registration system for individuals and enterprises in the tourism sector, Santos has 19 accommodation facilities registered with 2,234 rooms and 256 accessible rooms (which accounts for 11% of the total of rooms), as recorded in December 2023.

In a city the size of Santos, it is a very low figure, which means that hotels are not registered in the system.

The city of Santos showed improvement in post-pandemic performance (2022 and 2023) ending the year 2023 with an average occupancy of 58.42% and RevPAR of BRL 198.08, representing an increase of 2.92 percentage points in occupancy and +42.6% variation in RevPAR when compared to 2022.



Source: Brazilian Association of the Hotel Industry in the State of São Paulo - ABIH-SP

9.9. NUMBER OF TOURISM PROFESSIONALS AND COMPANIES REGISTERED IN THE NATIONAL SYSTEM OF THE MINISTRY OF TOURISM

SANTOS	JANUARY/2023	JANUARY/2024
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Travel Agencies and Tour Operators	217	241
Support to Nautical Tourism and Sport Fishing	2	2
Tour Guides	253	273
Car Rental Companies	8	7
Accommodation	17	19
Event Organizers	25	34
Service Provider for Support Infrastructure in Events	8	8
Service Provider Specialized in Tourism Segments	32	32
Restaurants, Cafes, Bars and Similar	55	60
Tourist Carrier	21	20
TOTAL	638	696

Source: Ministry of Tourism

CONSIDERATION OF THE NINE KEY CITIES

Santos, a coastal city in the state of São Paulo, emerges as a frontrunner among the cities monitored for boasting the most favorable sustainability indicators. In the state's Sustainable Development Index ranking, the city holds the 15th position. It is particularly distinguished for its clean water and sanitation, as well as its efforts against global climate change. Campinas also boasts strong indicators in these two pillars and ranks 56th in the state ranking.

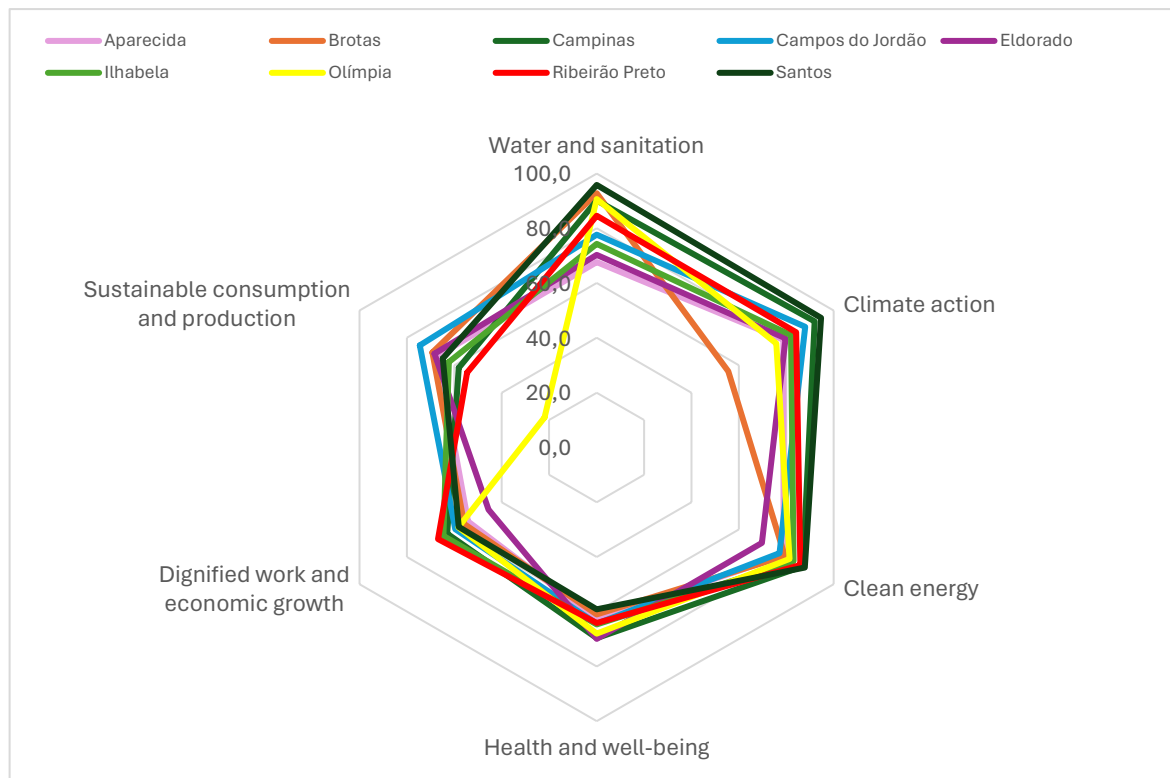
On the other hand, Olímpia, Brotas, Aparecida, and Eldorado deserve attention regarding certain aspects of sustainability.

Olímpia, known for its strong tourist appeal, especially for its water park and rural tourism, faces significant challenges regarding sustainability. The city ranks 459th out of 645 municipalities in the state of São Paulo, standing out for critical challenges in terms of sustainable production and consumption.

Brotas needs to step up its engagement in actions to combat global climate change. While known for its natural beauty and adventure tourism, the city faces significant challenges related to environmental preservation and mitigating the effects of climate change.

Aparecida and Eldorado, two charming cities with tourist potential, face crucial challenges regarding workplace dignity. Ensuring decent employment conditions not only benefits the workers but also plays a fundamental role in strengthening the local economy. Fostering sustainable tourism in these regions can be a promising solution, as it not only creates opportunities for dignified employment but also preserves and valorizes the natural and cultural resources of the communities, generating long-term economic benefits.

Sustainable Development City Index São Paulo 2020 (index 0-100)



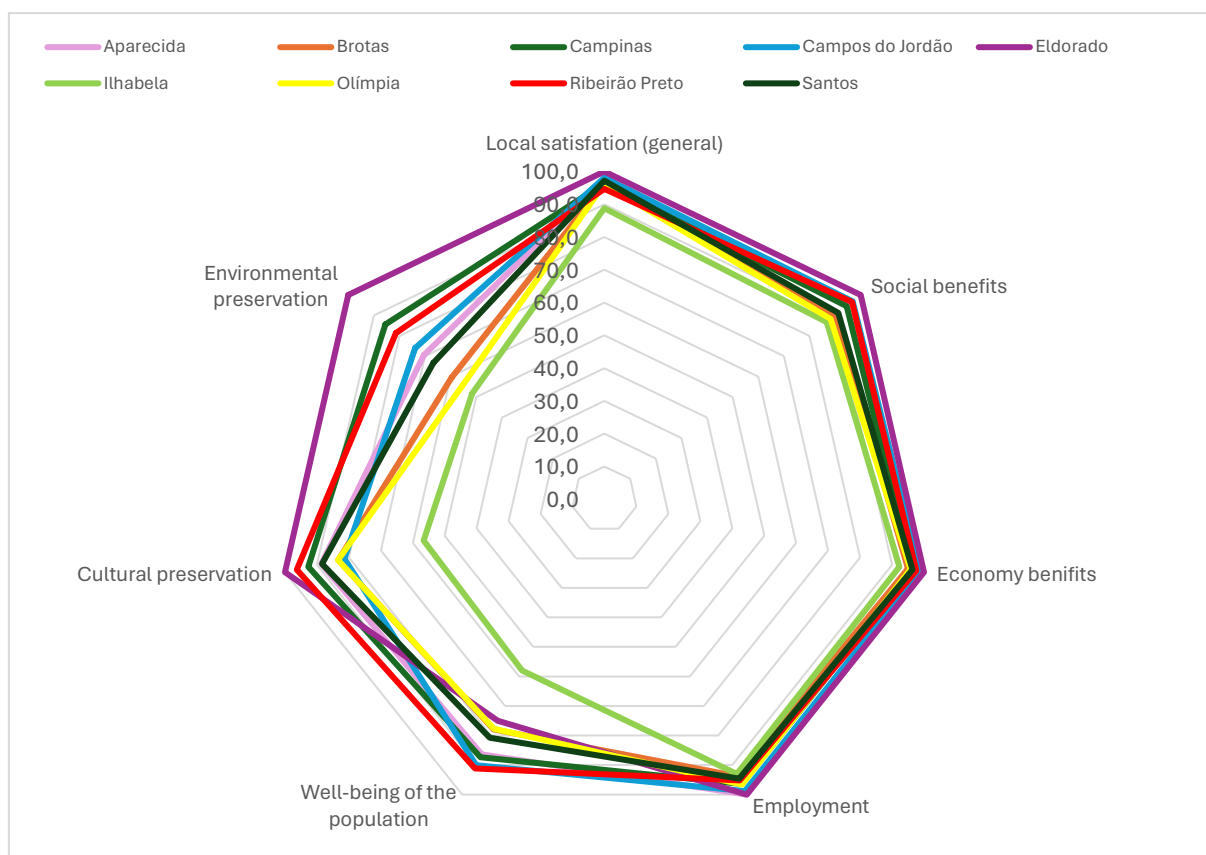
Source: Sustainable Development Index of Cities and CITE/SETUR-SP

From the resident's perspective, generally, tourism is seen as a beneficial activity for the population, the economy, and job creation. Eldorado stands out positively, with residents expressing maximum satisfaction for these three indicators.

On the other hand, while acknowledging the importance of tourism to the local economy and job creation, residents of Ilhabela express growing concerns about environmental, cultural, and community well-being, presenting the worst indicators among monitored cities. The island's stunning natural beauty attracts thousands of tourists during the peak season, impacting its carrying capacity. This influx of visitors results in significant social challenges, such as congestion and increased cost of living. Additionally, serious concerns arise about environmental degradation, coastal pollution, and loss of local traditions.

Overall, the indicators from the residents' perspective have not reached a critical level, and most residents are satisfied with tourism in their city. However, it is crucial to understand the challenges faced and work in collaboration with municipalities to identify opportunities for improvement, aiming for the development of sustainable tourism.

Local satisfaction with tourism survey 2023 (index 0-100)



Source: CITE/SETUR-SP

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>).

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