

SUMMARY VERSION

# STRATEGIC AND MARKETING PLAN FOR AZORES TOURISM

HORIZON 2030







GOVERNO  
DOS AÇORES



## FICHA TÉCNICA

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### TITLE

Strategic and Marketing Plan for  
Azores Tourism - Horizon 2030 |  
Summary Version

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Regional Government of the Azores  
Regional Secretariat for Tourism,  
Mobility and Infrastructure

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## Preamble

The history, identity, and strategy of the Azores as a tourist destination are based on sustainability. Our future lies in strengthening this sustainability of international prestige, which is constantly being confirmed.

Today, when it comes to sustainability, we are an international reference, a case of success and study, in Portugal, the European Union and the world.

We have, by option, to continue to aspire to even higher heights.

In the words of the poet, "we have in (us) all the dreams of the world".

And in order to dream higher, we must always reconcile tourist activities with environmental conservation, the protection of natural and Cultural resources, and the social and economic development of our islands.

Minimizing the negative impacts and maximizing the positive benefits of tourism, both in the short and long term, is our obligation.

Beauty and fragility coexist on our islands.

The fragility of our islands and their beauty are the hallmark of our wealth, but at the same time of our environmental vulnerability.

What's more, the development of tourism must be a foundational reason for the harmonious development of our nine islands.

Entrusted to the entrepreneurial capacity of Azoreans and external investors, the development of sustainable tourism has

in the Government of the Azores an ally and, at the same time, an attentive inspector, so that, in our action on public policies, where we have too much tourism, we control it, and where we have less tourism, we encourage it.

This is how we impose strategic territorial cohesion.

The active participation of local communities, entrepreneurs, and town councils in the planning, decision-making and management of tourism is essential to guarantee the sustainability of tourism in the Azores.

**Economic development is only sustainable if it does not override the environmental and social sustainability of tourism in the Azores.**

**This is the aim of this Strategic and Marketing Plan for the Azores Tourism.**



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## PROCESS

2022

2023

DECEMBER

JANUARY

FEBRUARY

MARCH

Diagnostic Analysis

Strategy and Marketing Policy

Public Consultation

Final Presentation

Meetings and/or Surveys of Trade, Stakeholders, Tour Operators and Residents

## METHODOLOGY

## PRIMARY DATA

- Consultation meetings with trade, stakeholders and residents on the 9 Islands
- Online surveys of residents, trade, stakeholders and tour operators
- Interviews with sector's key public and private agents



## SECONDARY DATA

- Primary sources of knowledge of the sector (OMT, WTTC, ETC, among others)
- National and regional statistics authorities
- Digital platforms (OTAs, operator websites, among others)



# 01

## How we are growing

Since the beginning of the 21st century, tourism in the Azores has developed consistently.

In 2015, with the liberalization of the airspace, the destination entered a new phase of development, having since seen significant growth that allowed **tourism to be positioned as one of the most important economic sectors in the Region.**

Since 2019, **we are the first archipelago in the world certified as a sustainable tourist destination**, a milestone in the international affirmation of the Azores.

**In 2022, we recorded the best tourist year ever**, surpassing pre-pandemic results, proof of resilience of Azorean tourism, which recovered at a faster pace than expected.



**1999**

- Greater investment in Tourism, with operations in the Swedish market
- Adaptation to the Autonomous Region of the Azores of the legal regime of the installation and operation of tourist enterprises

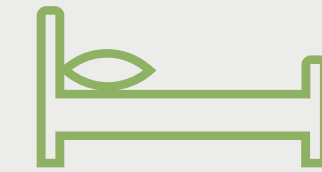


**2003**

Foundation of the Azores Tourism Association

**2008**

Beginning of the Economic Crisis in Portugal



**2014**

Legal Regime for Local Accommodation

**2018**

Creation of the Azores DMO (Destination Management Organization)

Mission Structure for Destination Sustainability



**2020**

Beginning of the COVID-19 Pandemic

Creation of the Clean&Safe Azores Seal



**2023**

**PEMTA 2023-2030**

**EVOLUTION OF TOURISM IN AZORES – IMPORTANT HISTORICAL MILESTONES**



**2001**

Regional Medium-Term Plan 2001-2004

**2006**

Foundation of the Azores Tourism Observatory



**2011**

Troika in Portugal

**2015**

Liberalization of the Airspace

**PEMTA 2015-2020**

New Azores Brand



**2019**

Certification of the Azores as a sustainable tourist destination by EarthCheck



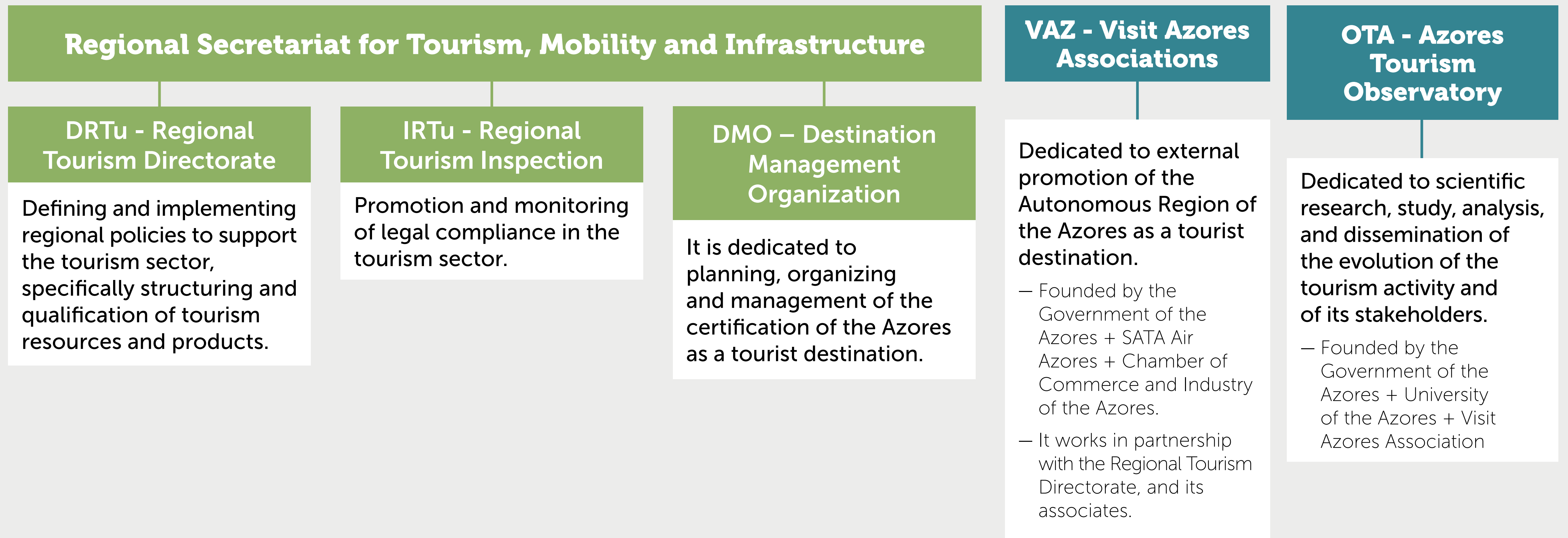
**2022**

Record numbers of overnight stays, guests and revenue





## KEY PLAYERS OF THE AZOREAN TOURISM SYSTEM





## THE LIFE CYCLE OF THE AZORES AS A TOURIST DESTINATION

In terms of life cycle, **the Azores is a tourist destination in the development phase**, having seen greater growth in tourist demand from 2015 onwards.

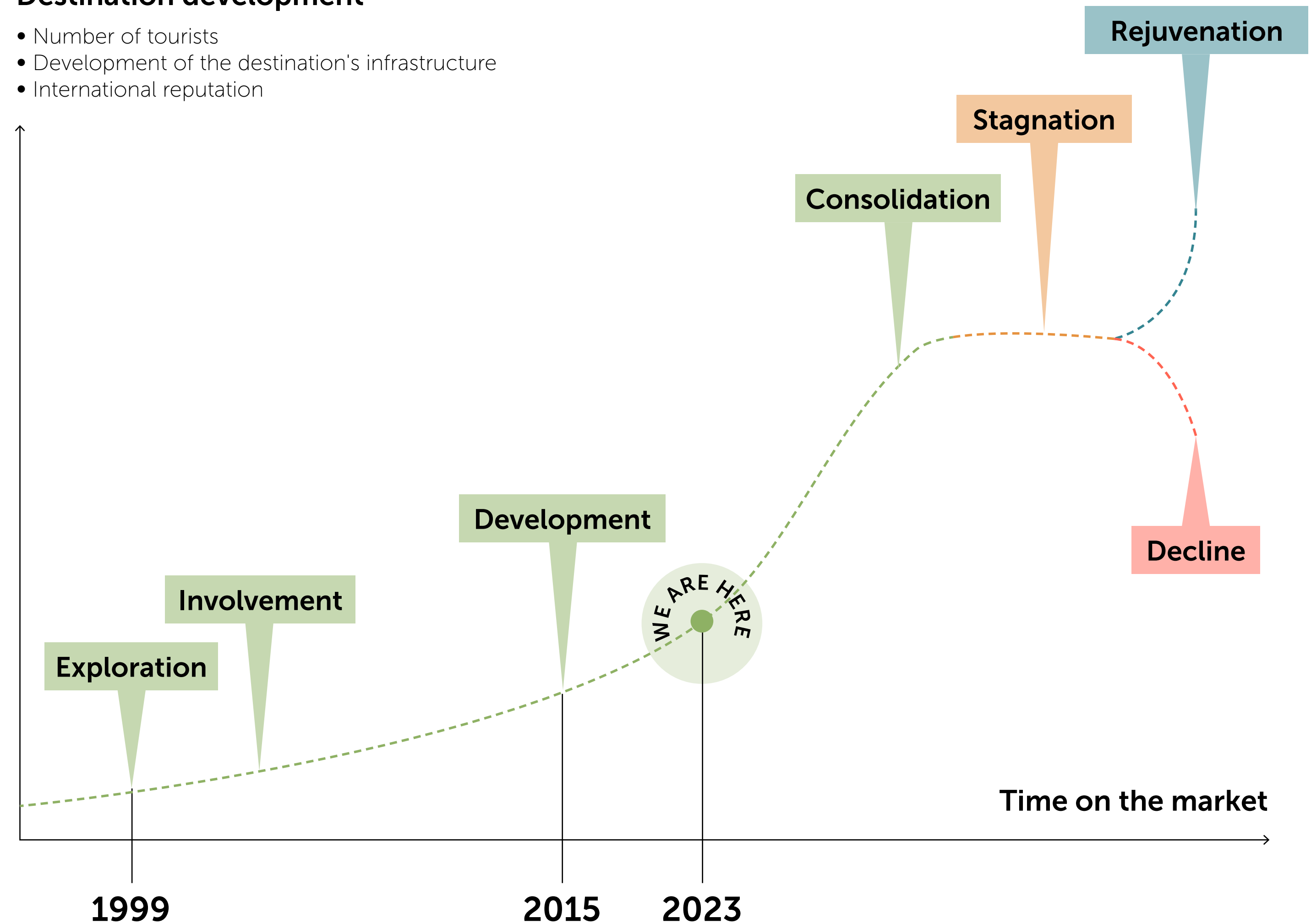
### Infographic

Adapted from Butler, 1980, Tourism Area Life Cycle Model

IPDT analysis, based on the destination's official statistics and the opinion of the trade, stakeholders and international tour operators.

### Destination development

- Number of tourists
- Development of the destination's infrastructure
- International reputation





# AZORES, CERTIFIED SUSTAINABLE TOURIST DESTINATION

In 2019, the Azores became the **first archipelago in the world certified as a sustainable tourist destination** by EarthCheck.



## ENVIRONMENT

- **25%** of the land area of the Azores is "Protected Area" - 56.2 thousand hectares
- **35%** of the energy produced comes from renewable sources (2021)
- The reuse and recycling rate is **40%** (2020)

## CULTURE

The Azores has 3 distinctions awarded by UNESCO: **World Heritage; Biosphere Reserve; World Geopark**

The Underwater Heritage of the Azores was distinguished with the **European Heritage Label**

In 2021, the Region invested around **12 million euros** in Cultural and creative activities

## ECONOMY

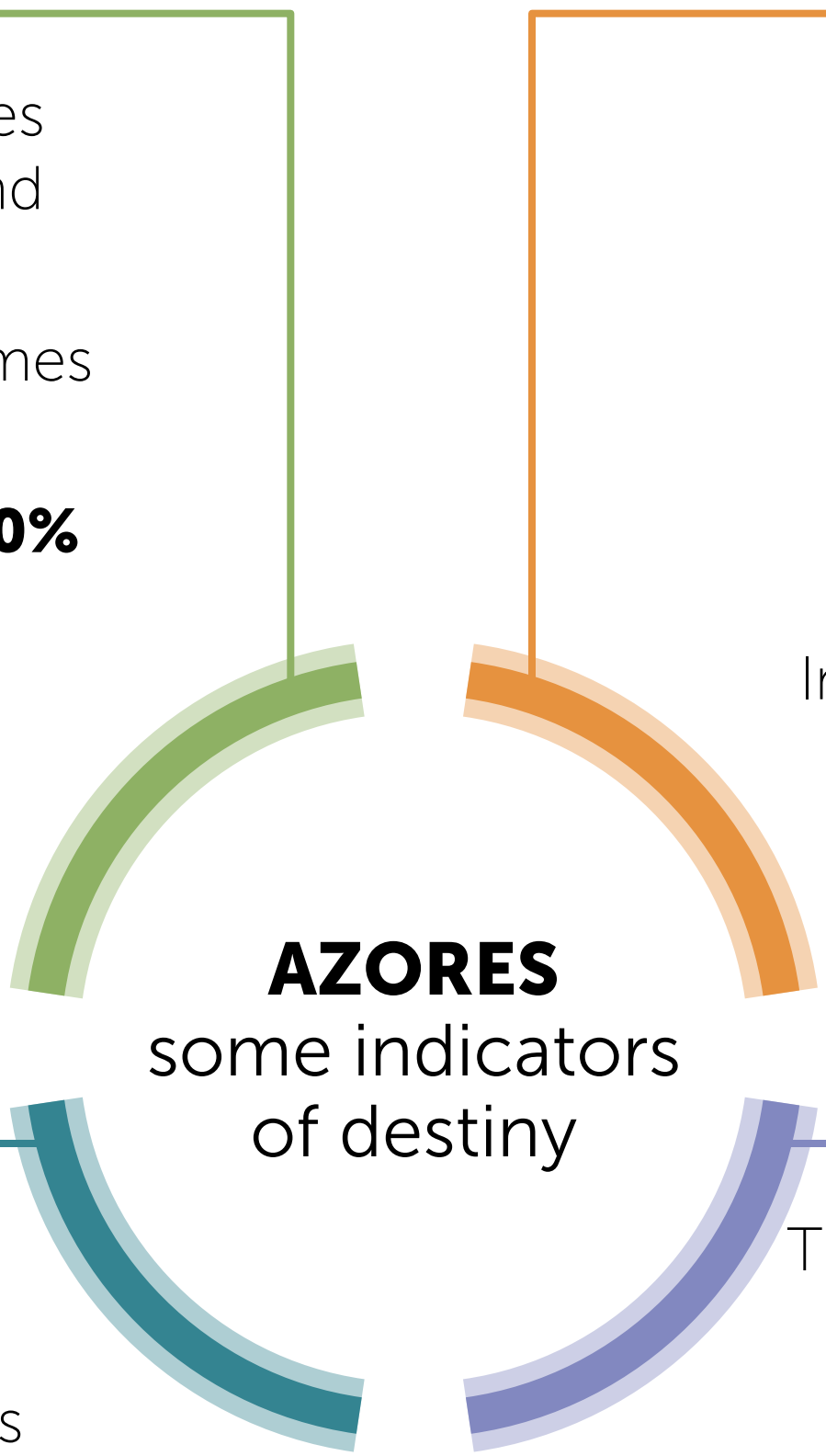
- In 2021, the GDP per capita recorded was **18.263€**
- In 2019, companies' Turnover was **5.5 billion euros** (+25% Vs 2015)
- Tourism was responsible for **13%** of the Region's Gross Added Value (2019)

## SOCIETY

The at-risk-of-poverty rate fell **31.2%** between 2017 and 2020

In the 4th quarter of 2022, the unemployment rate in the Azores fell to **5.5%** (one of the lowest ever)

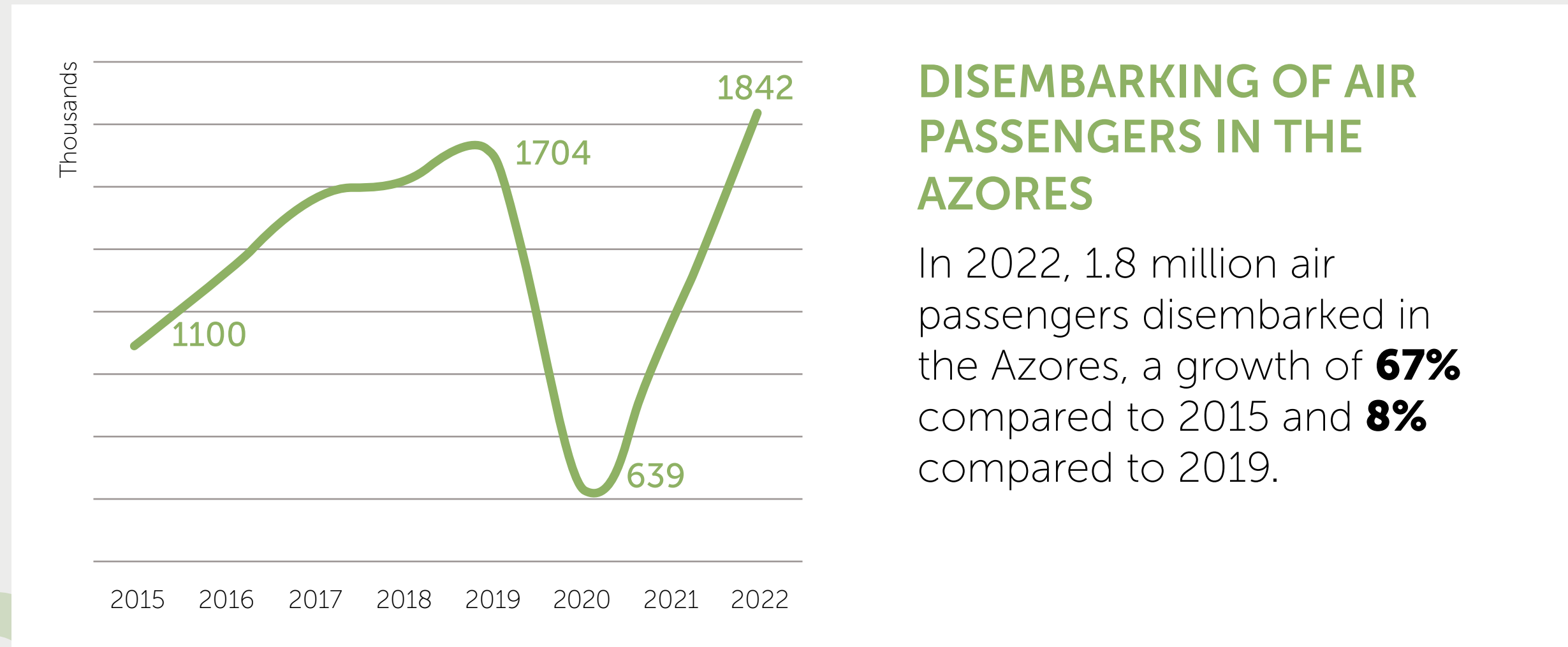
The Azores have been distinguished, since 2020, as **European Safest Destination**





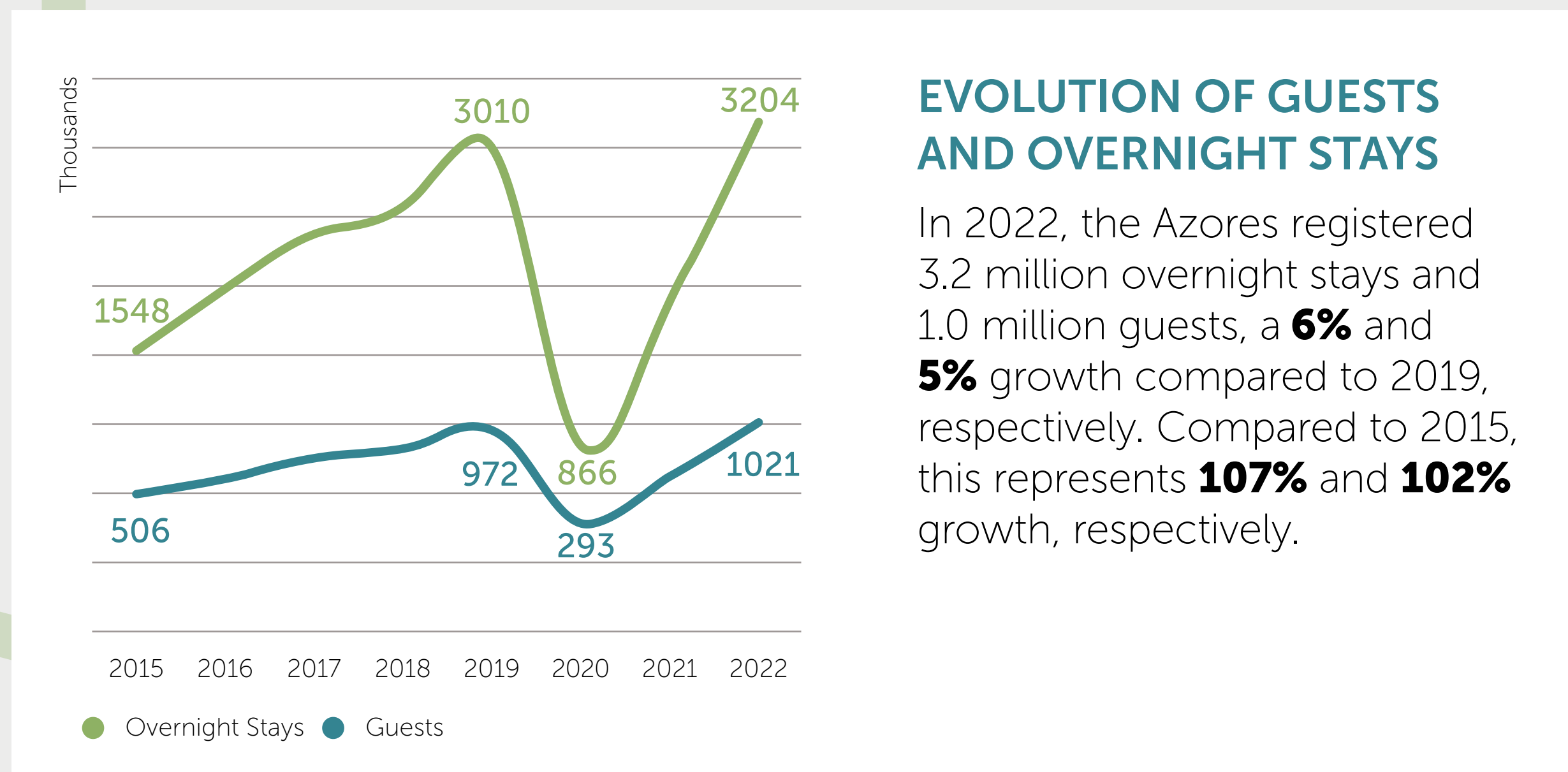
# RESULTS ACHIEVED IN 2022

In 2022, the Azores surpassed the results of 2019, in terms of disembarked **air passengers**, **overnight stays** and **guests**.



## DISEMBARKING OF AIR PASSENGERS IN THE AZORES






In 2022, 1.8 million air passengers disembarked in the Azores, a growth of **67%** compared to 2015 and **8%** compared to 2019.



## EVOLUTION OF GUESTS AND OVERNIGHT STAYS

In 2022, the Azores registered 3.2 million overnight stays and 1.0 million guests, a **6%** and **5%** growth compared to 2019, respectively. Compared to 2015, this represents **107%** and **102%** growth, respectively.

## TOP 5 OF GUESTS AND OVERNIGHT STAYS IN 2022

-  Portugal
-  Germany
-  USA
-  France
-  Spain

In 2022, **61%** of overnight stays in the Azores were from international guests. Portugal continues to be the main market for overnight stays (**39%**) and guests (**45%**).

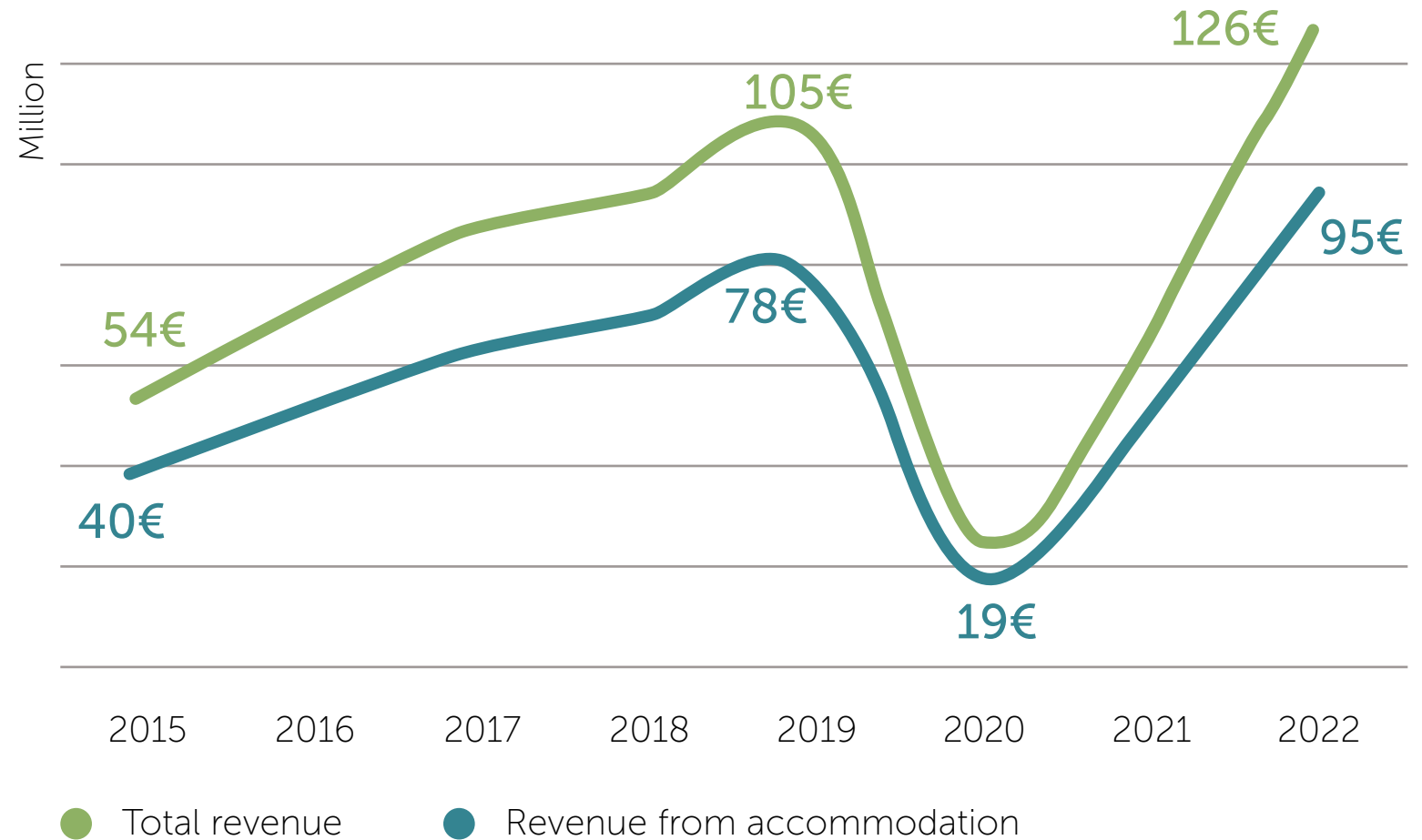
Source  
SREA; INE



# RESULTS ACHIEVED IN 2022

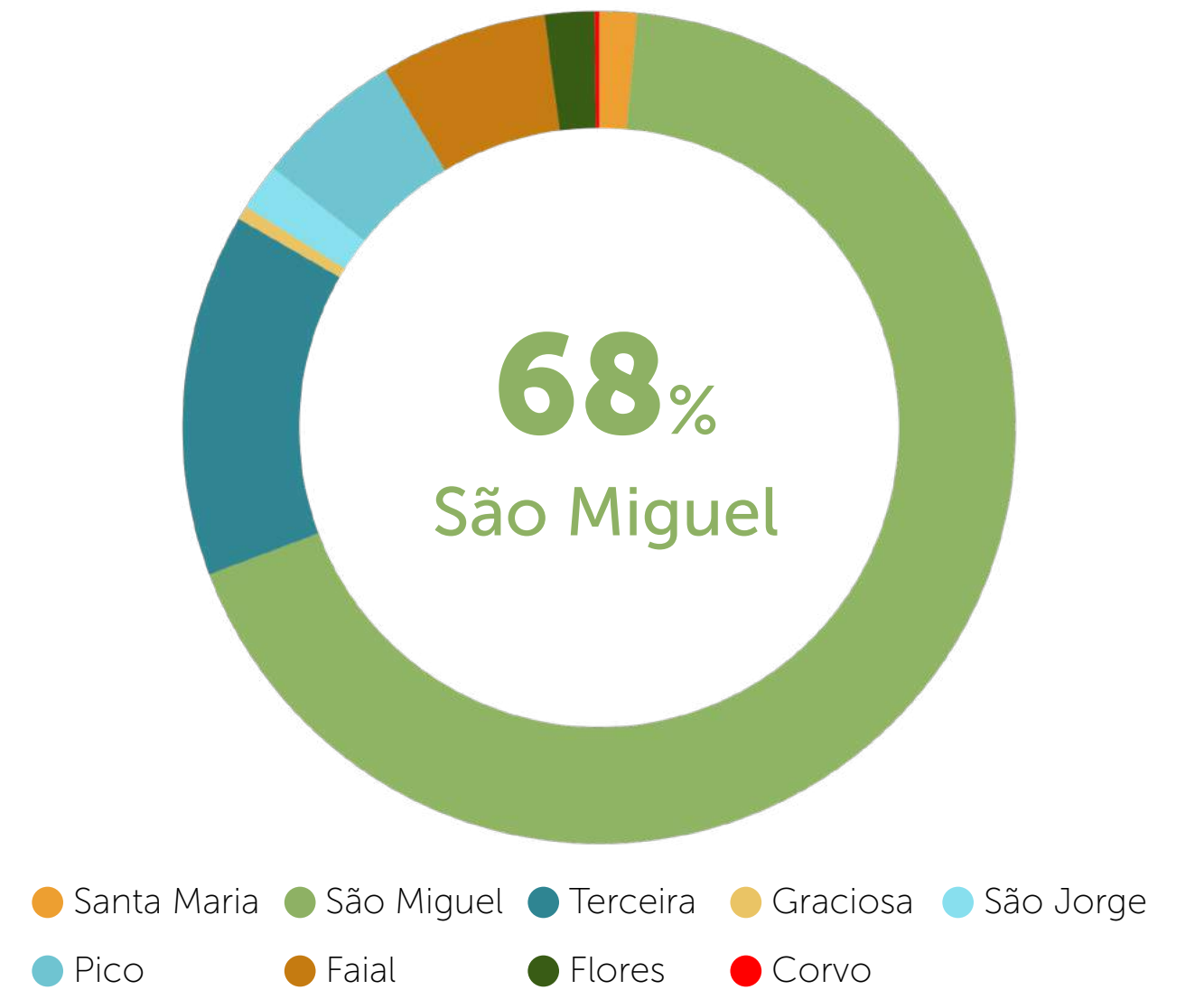
In 2022, the Azores recorded the highest value in Total and Accommodation Revenue. Between 2015 and 2022, RevPAR increased by €25, and the seasonality rate decreased.

## TOTAL AND ACCOMMODATION REVENUE IN TH



In 2022, the Azores recorded a total of **126 million euros in total revenue** and **95 million euros in revenue from accommodation** in traditional hotels (TH), which shows a growth of **20%** and **22%**, respectively, compared to 2019.

## DISTRIBUTION OF OVERNIGHT STAYS 2022



In terms of overnight stays in 2022, **São Miguel accounts for 68% of the total** of the archipelago.

Compared to 2015 (**26.8€**), in 2022 (**51.8€**), RevPAR increased by 25 euros.

The seasonality rate stood at **43.1% in 2022**, **1.8 p.p. lower than in 2015**.

	2015	2019	2022	Evolution
RevPAR	26,8€	43,1€	51,8€	<b>+25€</b>
Seasonality Rate	44,9%	42,8%	43,1%	<b>-1,8p.p.</b>

Source  
SREA; INE



# SWOT ANALYSIS HIGHLIGHTS\*

- ▶ **Seasonality** of tourism flows, which impacts on the reduction of flights, business closures and increased unemployment in the low season;
- ▶ **Limitations in infrastructure** that facilitate relocation across the 9 islands;
- ▶ **Trip cancellations**, lane/boat journeys, as a result of adverse weather conditions;
- ▶ **Insufficient tourist information** about the destination to support trip planning;
- ▶ **Lack of basic knowledge** of tourism by some SMEs.
- ▶ **Inconsistent quality** of the tourism offer between the islands;

## WEAKNESSES



## STRENGTHS

- ▶ **Hospitality** of the Azoreans;
- ▶ **Certified tourist destination**: the first archipelago in the world;
- ▶ **Culturel/historical/natural diversity** of the 9 islands;
- ▶ **3 UNESCO Classifications** – World Cultural Heritage, Biosphere Reserves and Geopark;
- ▶ **Mild climate**, with competitive temperatures especially in winter;
- ▶ **Geolocation** of the Archipelago.

- ▶ **Greater financial capacity** of competitor destinations to invest in promotion, product structuring, and visiting infrastructure support services;
- ▶ Presence of tourist segments with **low awareness** of adoption of sustainability behaviors;
- ▶ **Seasonal behavior** of tourist markets;
- ▶ **Climate change** and increase in the frequency of weather phenomena;
- ▶ **Loss of qualified population**, due to emigration / immigration.

## THREATS



## OPPORTUNITIES

- ▶ Destination with **high potential of development** in the tourism destination life cycle;
- ▶ **Proximity** between the American and European continents;
- ▶ Greater demand for and **appreciation of sustainable, safe and peaceful destinations**;
- ▶ **Segmentation and personalization of communication** via digital methods;
- ▶ **Access to EU funds and incentives** to promote qualification and destination infrastructure;
- ▶ **Greater appreciation** of concepts associated with consumption of local products.

\*Consult the complete SWOT Analysis in the full version of the Azores Tourism Strategic and Marketing Plan 2030. | IPDT Analysis



# 02

## The road to 2030

**Growing in value and quality.** This is the path we are charting to develop Azorean tourism by 2030. We want to affirm the Azores as a sustainable destination that leads by example, in which everyone - visitors, residents, and entrepreneurs - see themselves and feel involved.

Our positioning - "**Azores: 9 islands, the experience of a lifetime**" - reflects what we want for Azorean tourism. A tourism that is distributed evenly across the 9 islands and generates value for the local community. We proudly affirm that the experience of those who visit us is only complete when they know (in depth) the 9 Azorean islands. It is a remarkable and unforgettable experience.

We have to measure the success of tourism differently. To this end, **we have set 18 targets, to be achieved by 2030**, which measure growth by quality. Tourism's success is greater the greater the economic, social and Cultural return for our territory and for our communities.

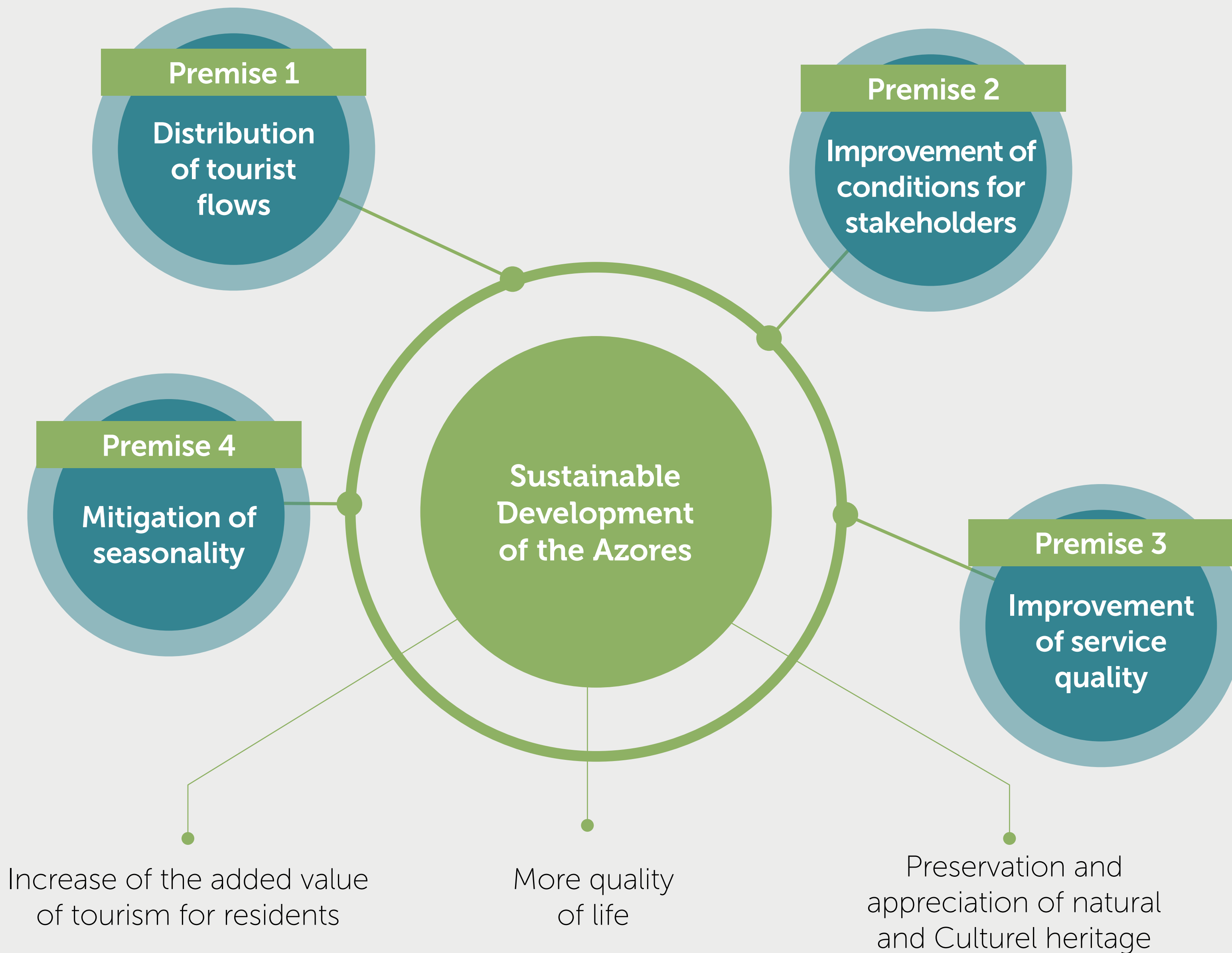


# SUSTAINABILITY

## CENTRAL PILLAR OF DEVELOPMENT

We assume Sustainability as the central pillar of the development of the Azores, which is based on 4 premises.

Residents should **always** be part of the **tourism development equation.**





# 9 DIFFERENTIATING ASSUMPTIONS OF THE AZORES

We defined the Positioning of the Azores based on 9 assumptions that **differentiate the destination worldwide.**

1

The Azores are volcanic islands, **an exclusive nature destination**, unparalleled worldwide.

2

The Azores allow **unique nature experiences all year round**, always with mild temperatures.

3

In the Azores **you live in full harmony between nature, animal life and locals**, making of the Archipelago a place of reencounter and knowledge.

4

The Azores are recognized internationally for its **commitment to sustainable development.**

5

The Azores have a **privileged geostrategic position**, halfway between Europe and America.

6

The experiences on the **9 Azorean islands must be elevated and recognized as an unparalleled landmark** in the lives of visitors.

7

The Azores is a **safe destination** (in its broadest sense) and peaceful.

8

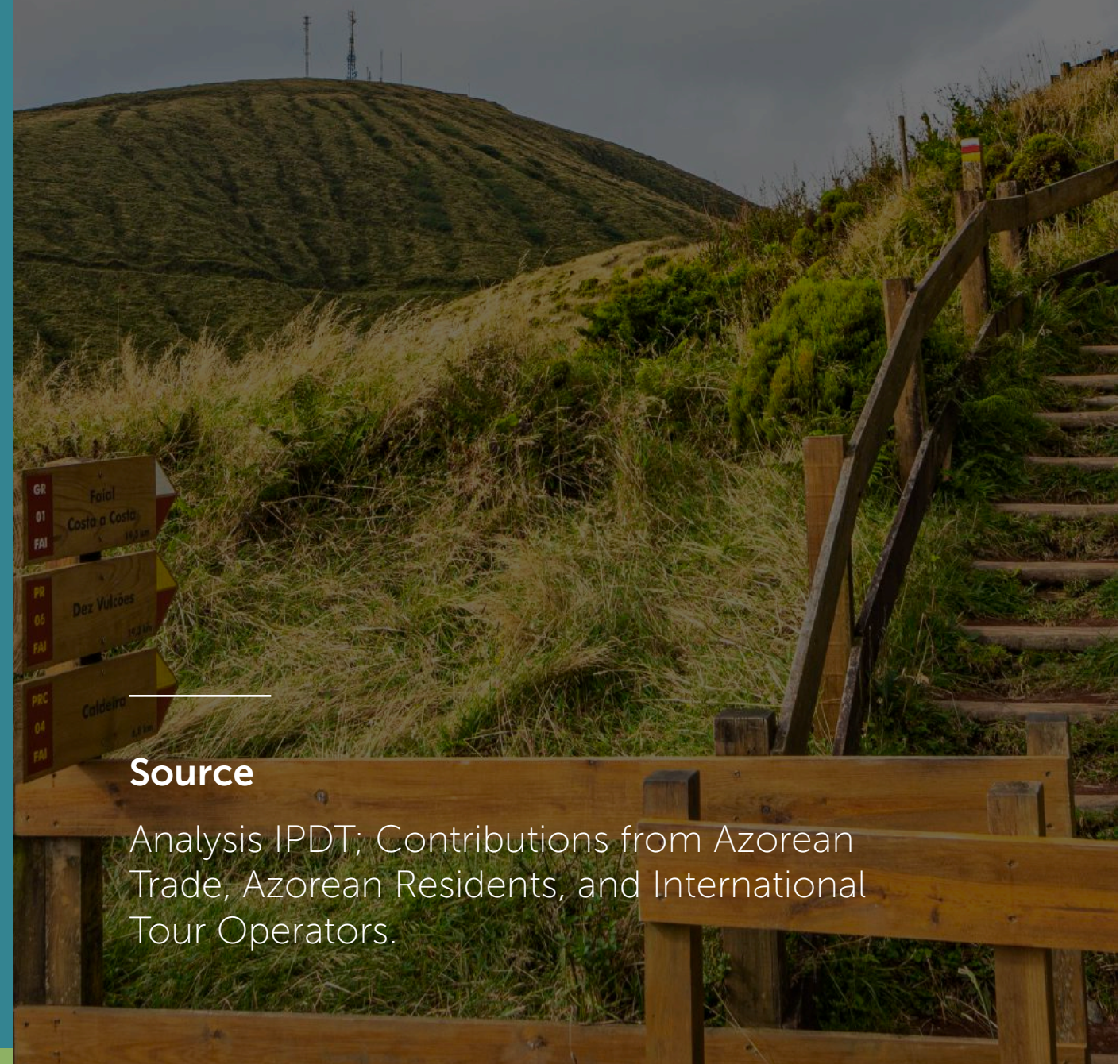
**Azorean culture is an asset that deserves to be profoundly experienced**, reflecting centuries of history of settlement and conquests.

9

You only truly know the Azorean essence when you visit the 9 islands. **Visiting the 9 islands is reaching a feeling of accomplishment.**

Source

Analysis IPDT; Contributions from Azorean Trade, Azorean Residents, and International Tour Operators.





## POSITIONING OF THE AZORES

The positioning "Azores: 9 islands, the experience of a lifetime", aims to mirror the feeling that visiting the 9 islands is a remarkable and unforgettable experience.

### **Getting to know the Azores is a memorable experience in the lives of those who visit us.**

It is much more than "being" in a destination. It is to feel in complete harmony with nature, experiencing a genuine Azorean welcome, a distinct lifestyle. It is to know a characteristic way of life, and "enter" a new state of mind.

### **Visiting the 9 Azorean islands is to achieve a feeling of accomplishment.**

We affirm that our life is not complete if we have not known, experienced and lived the essence of each Azorean Island.

### **The Azores is composed by 9 islands, all of them unique.**

Each one provides a unique and memorable experience, when we let ourselves be carried away by curiosity, adventure, and the desire to immerse in the local culture and nature.



**AZORES:  
9 ISLANDS, THE  
EXPERIENCE OF  
A LIFETIME!**



We have defined a Vision and a Mission that reflect our commitment to the sustainable development of the territory and the well-being of people, affirming tourism as a determining sector for generating value for our residents and entrepreneurs.

## **VISION.**

In 2030, the Azores lead the international panorama, recognized as nature destination, sustainable, exclusive, with a unique Cultural heritage, where tourism contributes positively to economic and social development, ensuring the satisfaction of residents, companies and tourists.

## **MISSION.**

To evolve towards achieving the objectives of sustainability, through continued actions of protection and preservation practices of natural and historical-Cultural resources on the 9 islands; the modernization of services related to the tourist activity; and the implementation of an information system for monitoring and adapting destination management policies.



## 4 STRATEGIC OBJECTIVES TO BE ACHIEVED BY 2030

We defined 4 strategic objectives, 23 specific ones and 18 goals to be achieved by 2030.

1

**Consolidate the Azores internationally as a sustainable tourist destination, leading by example.**

2

**Reduce Seasonality and distribute tourist flows, while managing carry capacities.**

3

**Raise quality standards and generate more value, modernizing practices, creating information systems, qualifying the workforce, while evolving the legal framework of tourist activities.**

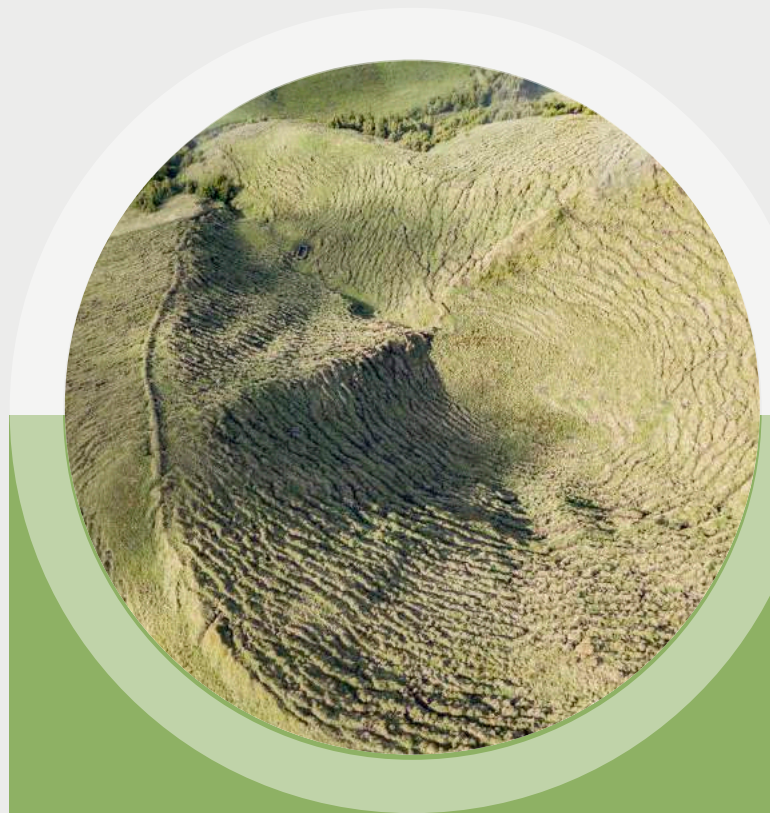
4

**Leverage notoriety among the end consumer, investing in the digitalization of the promotion and the international dissemination of the Azores destination.**





## GOALS TO BE ACHIEVED BY 2030



# 1

Consolidate the Azores internationally as a **sustainable tourist destination**, leading by example.

### Goals 2030

Achieve **gold-level** EarthCheck certification by 2024

Achieve EarthCheck **platinum-level** certification by 2029

**15% of Azorean tour operators** committed to sustainability certification processes

**80% of the local community** satisfied with the tourist activity

### Starting point

2023:  
**Platinum-level<sup>1</sup>**

2022:  
**3%<sup>1</sup>**

2023:  
**65%<sup>2</sup>**



# 2

**Reduce seasonality** and distribute tourist flows, managing carrying capacities.

### Goals 2030

Hotels bed occupancy rate is over **35%** in each of 9 the islands

**20%** of the region's tourists have visited 3 or more islands

**1,2 million** passengers disembarked on inter-island flights

Reduce the seasonality rate of overnight stays to **38%**

Increase to **21%** the weight of overnight stays between November and March.

### Starting point

2021:  
**3 ilhas exceed 35%<sup>3</sup>**

2023:  
**No data available**

2022:  
**829 thousands<sup>3</sup>**

2022:  
**43%<sup>3</sup>**

2022:  
**19%<sup>3</sup>**



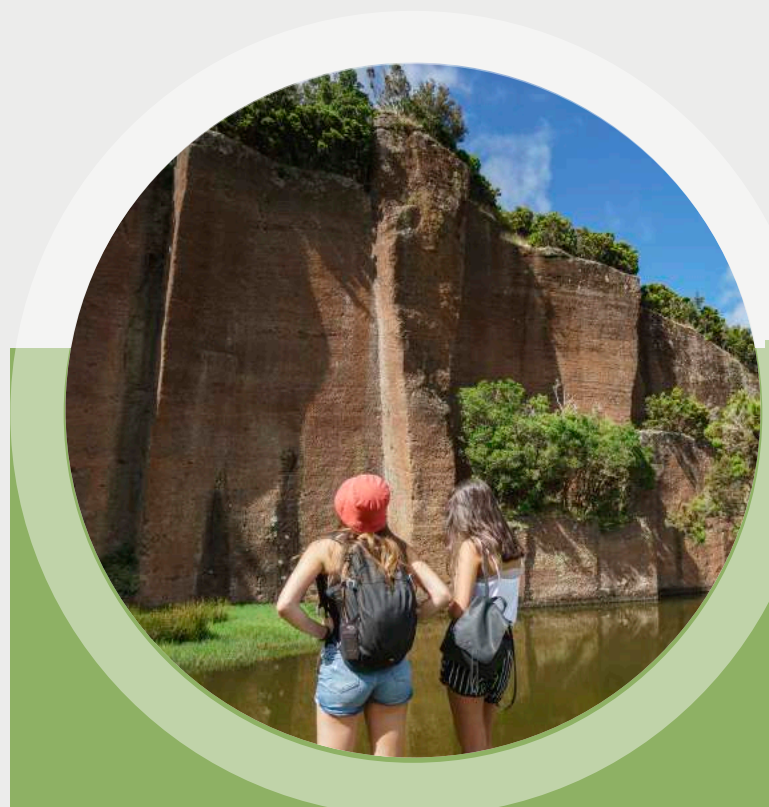
# GOALS TO BE ACHIEVED BY 2030



## 3

Raise **quality** standards and generate more value.

Goals 2030	Starting point
Tourism contributes <b>19%</b> to the GVA of the Azores	2022: <b>13%</b> <sup>1</sup>
<b>90%</b> of tourism business managers are trained in the sector and seek training for their staff	2023: <b>No data available</b>
Level of visitor satisfaction above <b>4.6</b> points (out of 5)	2022: <b>4,5pts</b> <sup>2</sup>
Achieve a RevPAR of <b>78€</b> in Traditional Hotels	2022: <b>51,8€</b> <sup>3</sup>
<b>70%</b> of the Azorean trade consider the region's tourism to be developed or highly developed	2022: <b>44%</b> <sup>4</sup>



## 4

Raise **awareness** among the end consumer

Goals 2030	Starting point
<b>80%</b> of Azorean tour operators are satisfied with the destination's communication	2023: <b>No data available</b>
<b>80%</b> of Azorean tour operators have advanced skills to promote online	2023: <b>57%</b> <sup>4</sup>
<b>80%</b> of visitors recognize the Azores as being a sustainable destination	2023: <b>No data available</b>
<b>80%</b> of visitors confirm that the destination's communication has an impact on their trip.	2023: <b>No data available</b>

Sources: 1 – INE; 2 - OTA – IATA Winter 2021/2022; 3 –SREA; 4- IPDT - Trade survey 2023



## STRATEGIC GUIDELINES

We have defined strategic guidelines for qualifying the Azorean tourist offer.



### ACCOMMODATION

**The various types of accommodation in the Azores must be aligned with all the assumptions behind the destination's positioning, where quality and sustainability in the broad sense stand out.**

Accommodation, as the tourism subsector that most impacts the level of overall satisfaction of the tourist experience, needs a close alignment of the practices of its companies with the PEMTA 2030 strategy.



### F&B

**Food and beverage is an exceptional platform for showcasing and promoting the unique identity of Azores**

The infrastructure, service, quality of food preparation, and the use and recommendation of local products are essential and strategic elements for those who operate or intend to operate in the sector.



### TOURIST ENTERTAINMENT

**To the Azores, as a nature destination, tourist entertainment plays an essential role in the level of satisfaction of the visitor's experience**, as its quality is fundamental to the positive reputation as an exclusive, sustainable, adventure or escape nature destination, on the national and international scenes.

The specific strategic guidelines for each sector are available in the full version of the Strategic and Marketing Plan for Azores Tourism – Horizon 2030 (PEMTA 2030).





## COMMERCE

**Traditional commerce should reflect the Azorean culture and promote a feeling of proximity, empathy, and professionalism, while maintaining its authenticity.**

The aim is to promote the development of a high-quality alternative retail concept that contributes to the qualification of the destination as a whole and meets the demands of market segments looking for this complement.



## TRANSPORT

**The Azores tourist experience can be greatly influenced by transports - typology, ease and flexibility of travel to and between islands.**

It is, therefore, an issue that requires the definition of an efficient strategy that integrates and articulates air, sea, and land transportation.

The focus must be on the ease and quality of mobility to and between the nine islands. In this context, the transport sector is vital for residents' quality of life, the tourist experience, and the reduction of seasonality in the tourism sector.

PEMTA 2030 presents a set of guidelines to help arriving at an efficient model, capable of providing the best answers to the current challenges.



## SUPPORT SERVICES

**In order to thrive, tourism requires a range of support services which, while primarily for the use of residents, are essential for the sector in that they provide visitors with the sense of confidence they need when they decide to travel outside their areas of residence.**

Health and safety services, among others, must be appropriately organized and referenced so that everyone knows about them and can access them easily.



# 03

## Our strategic bets

Nature, sea, and culture are assets of the Azorean identity that shape the experience of those who visit us. **In the Horizon 2030, we will continue to focus on Nature - Land and Sea - as our priority product**, working in complementarity with our culture, gastronomy, wines, and wellbeing offer, which are central products to achieve our strategic objectives and goals.

In the markets where we will invest, **we defined four betting levels** that will prioritize our intervention. In these markets, **we have identified 13 strategic segments that we want to attract to the Azores**, as they have travel behaviors and motivations aligned with the offer. To reach these publics, a communication strategy aimed at the end consumer was designed and implemented, through digital channels, maintaining the commitment and proximity to the tourist operation, essential for the Azores, through traditional channels.



## IDENTITY ASSETS AND EXPERIENCE QUALIFIERS

We have defined 3 identity assets and 5 qualifiers that add value to the experience of those who visit us.

IPDT analysis, based on contributions from trade, stakeholders, local community, and international tour operators.

### IDENTITY ASSETS

#### Nature

Of singular beauty, designed by volcanic influence, in complete harmony with human activity.

#### Sea

That influences the Azorean way of life, the culture, and economic activities.

#### Culture

A community that perpetuates its values, knowledge, and customs, inspiring those who venture to discover it.

### QUALIFYING ASSETS

#### Hospitality

A genuine and natural welcoming host community.

#### Diversity

9 islands that offer diverse and high-value experiences.

#### Temperature

From the air and the sea, mild (and competitive) throughout the year, especially in winter.

#### Rurality

That shapes the landscape and raises the quality of the local gastronomy.

#### Security

Tranquillity and serenity lived throughout the territory.



# STRATEGIC PRODUCTS OF THE AZORES

We are going to bet on 8 strategic products, prioritized according to their current level of development and potential:

### Priority Product

Nature - Land and Sea

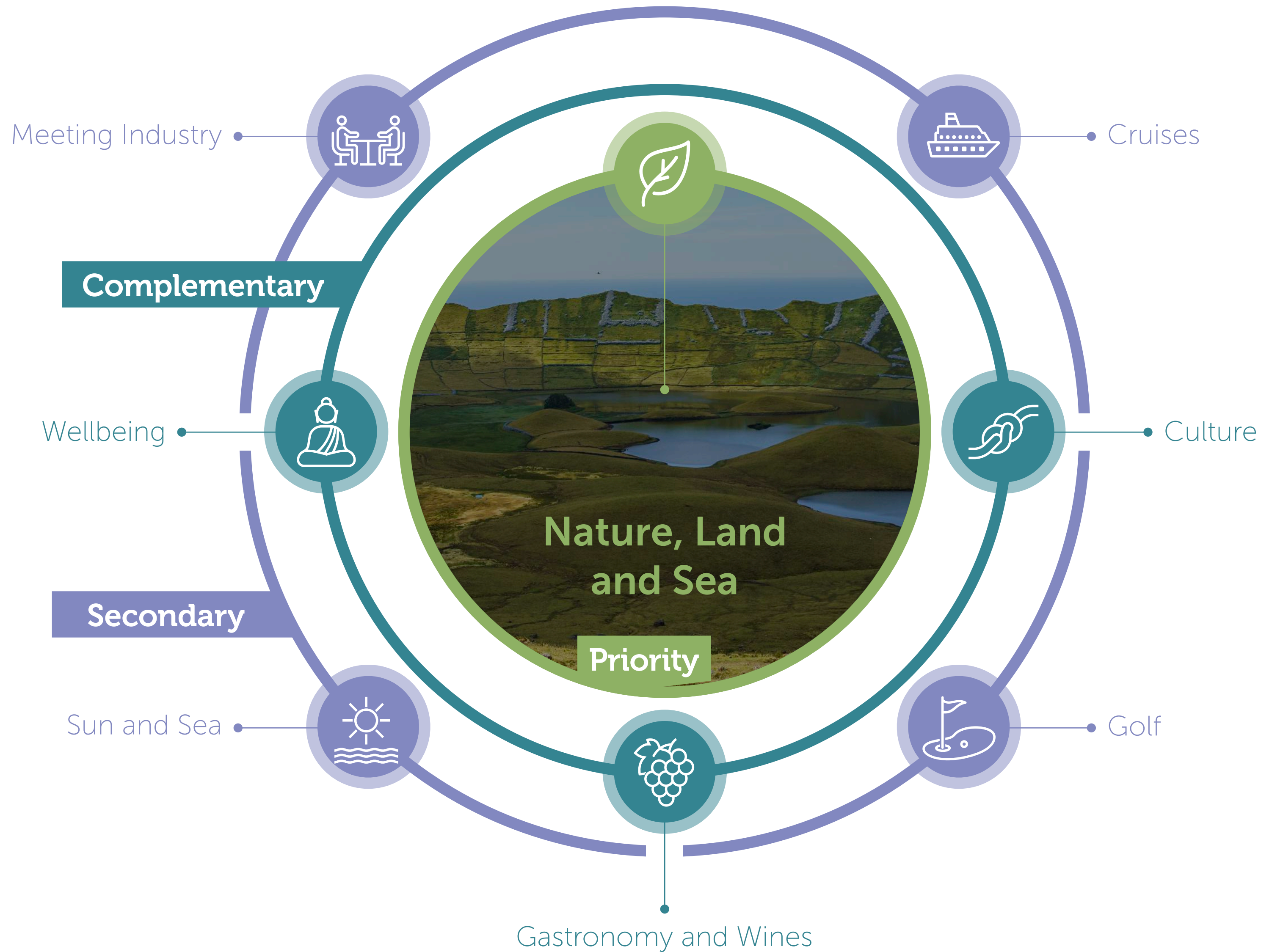
### Complementary Products

Culture  
Gastronomy and Wines  
Wellbeing

### Secondary Products

Cruises  
Golf  
Sun and Sea  
Meeting Industry

IPDT analysis, based on contributions from trade, stakeholders, local community and international tour operators







PRIORITY  
PRODUCT

# NATURE, LAND AND SEA

## Product positioning in the market

Preserved and protected nature, 4 Biosphere Reserves, paradisiacal mountain, and sea sceneries, of singular beauty, with a rich fauna and flora unique to each island. Volcanic, picturesque, and rural landscapes, in the middle of the Atlantic, and with a valuable geological, marine, and underwater heritage, classified as UNESCO World Geopark. A sanctuary for whale watching. A nature that appeals to evasion and adventure, with mild temperatures all year round, where rain and sun meet on the same day, to bring the lush and luxuriant vegetation to life. One of the few destinations in the world to boast three UNESCO designations.

## Measures to encourage travelling in the low season

- Organization of sporting events associated with the experiences listed.
- Elevate the climate (rain and temperature) as an element that qualifies the experience.
- Promote the idea that most experiences are practicable all year round.

## Measures to encourage visits to more islands

- Exploring and promoting the uniqueness of nature on each island.
- Complementarity between experiences (same theme, but different offers between islands).

## Experiences: on Land

### Evasion

- Canoeing/Kayaking (lagoons)
- Geotourism
- Hiking
- Birdwatching
- Equestrian tours
- Stand Up Paddle (lagoons)

### Adventure

- Canyoning
- Cycling
- Parasailing
- Rappel
- Trail Running
- Trekking

## Experiences: at Sea

### Evasion

- Sailing charter
- Yachting
- Whale watching
- Boat trips
- Tourist fishing

### Adventure

- Canoeing/Kayaking
- Coasteering
- Kitesurf and Windsurf
- Scuba diving
- Sport fishing
- Snorkeling
- Stand Up Paddle
- Surf e Bodyboard
- Sailing





COMPLEMENTARY  
PRODUCT

**CULTURE**

### • Product positioning in the market

A culture shaped by history and geography, rich in traditions, lived and preserved by people that are genuine, resilient, fierce and of faith. A culture represented by a unique landscape heritage, with geological and Cultural elements of high value – vineyard landscapes, agriCultural fields with tracery dry-stone walls and maroiços (a characteristic stone structure of the island of Pico); typical architecture; and two UNESCO World Heritage Sites: the Historic Centre of Angra do Heroísmo and the Pico Island Vineyard Landscape.

A culture that gives voice and life to its history and ethnographic heritage on all the islands. A preserved and inclusive culture, which transmits modernity and reaches out to the outside world through its various artistic and creative manifestations.

### • Measures to encourage travelling in the low season

- Organization of specialized events on Cultural and heritage themes.
- Structuring of experiences and events that promote creativity and immersion in the local culture.
- Promotion of traditions and religious festivals.

### • Measures to encourage visits to more islands

- Development and dissemination of thematic Cultural routes.

### • Tourist experience assets

- Handicrafts
- Historic Centre of Angra do Heroísmo – UNESCO
- Nautical History
- Historic Gardens
- Museums and Interpretive Centers
- Pico Island Vineyard Landscape – UNESCO
- Archaeological Heritage
- Whaling Heritage
- Industrial Heritage
- Literary and Artistic Heritage
- Military Heritage
- Religious Heritage:
  - Cult of the Lord St Christ of Miracles
  - Cult of the Holy Spirit
  - among others
- Underwater Heritage
- Artistic Residencies
- Azores Routes
- Viola da Terra (also known as “wire viola”, or “two-hearted viola”)





COMPLEMENTARY  
PRODUCT

# GASTRONOMY AND WINE

## • Product positioning in the market

A gastronomy based on the freshness of local products, from sea and land, and convent sweets from ancient recipes.

A gastronomy that lives up to traditional high-quality dairy production, which allows the manufacture of differentiated products, highlighting the varied Azorean cheeses.

A destination where you can taste wines of reference, and unforgettable spirits and liqueurs.

## • Measures to encourage travelling in the low season

- Quality of seasonal products and more personalised service, given the lower demand.
- Development of gastronomic events.

## • Measures to encourage visits to more islands

- Creation of gastronomic itineraries that emphasize contact with the identity elements of each island.
- Development of experiences that promote contact with the manufacturing process of local products and promote the preparation of traditional culinary recipes.
- Rural experiences.

## • Tourist experience assets

- Canned tuna
- Coffee and tea
- Fruits
  - Examples:
    - Pineapple
    - Honeydew
    - Passion fruit
    - Blackberry
    - Banana
  - (Among others)
- Dairy products
  - Examples:
    - Cheese
    - Milk
    - Yoghurt
    - Butter
- Bakery and sweets
  - Examples:
    - Lêvedo cake
    - Cheese cakes/ Queijadas
- Convent sweets
- Sourdough
- Honey
- Pico Island Vineyard Landscape – UNESCO
- Industrial Agrifood Heritage
- Traditional meat, fish and seafood dishes
  - Examples:
    - Rump
    - Regional Steak
    - Furnas Stew
    - Tuna steak
    - Grilled limpets
    - Soups of the Holy Spirit
    - Regional Octopus
- Wines, liqueurs, spirits, beers, and soft drinks





COMPLEMENTARY  
PRODUCT

# WELLBEING

## • Product positioning in the market

An experience of total physical and mental relaxation and balance, in communion with nature (in its pure state) and its elements, where tranquillity, security and genuine hospitality allow visitors to disconnect from their routine life.

An experience of escape, lived at the visitor's pace, that stimulates discovery and self-knowledge.

## • Measures to encourage travelling in the low season

- The hot thermal baths and iron water pools as a resource that contrasts with the temperatures of the tourists' countries of origin.
- Promote the serenity and tranquillity of the destination, together with the mild temperatures and low temperature ranges, which make it possible to slow down the pace of everyday life in the warmth of a climate that allows you to be outside in comfort.

## • Measures to encourage visits to more islands

- Development of physical and mental relaxation experiences that allow visitors to be in contact with the various elements of nature in different environments (uniqueness of each island).

## • Tourist experience assets

- Waterfalls
- Thermal complexes
- Isolation and silence in nature
- Mineral springs
- Outdoor thermal salt and fresh water pools
- Retreats and Holistic Experiences:
  - Meditation
  - Yoga
  - Mindfulness
- Reconnection with nature (Grounding)





SECONDARY  
PRODUCT

# MEETING INDUSTRY

## • Product positioning in the market

More than an event, an unforgettable experience. A differentiated alternative, far from the major urban centres, for corporate and scientific events in line with the principles of the circular economy, adopting sustainability practices, with high-quality infrastructures, hotels, gastronomy, and tourist entertainment activities.

The ideal destination for events in the low season, between November and March, when the temperature is mild.

A business trip that adds the benefits of fresh air and idyllic landscapes (invigoration, relaxation, feeling of well-being).

## • Measures to encourage travelling in the low season

- Being able to enjoy the destination without the constraints of the high season. A more personalised service, with superior quality and greater availability to make the experience memorable.

## • Measures to encourage visits to more islands

- Easier to travel between islands due to lower transport occupancy rates.
- Potential of the smaller islands to develop team-building activities.

## • Tourist experience assets

- “Congresses-walking distance” - proximity and ease walking
- Adventure and evasion activities on land and/or sea
- Certified sustainable destination
- Easy to create parallel programmes for travel companions and families
- Distinctive gastronomy
- Numerous possibilities for indoor Cultural activities
- Wide range of quality hotels
- Mild temperatures all year round





### Product positioning in the market

A destination for smaller cruises, such as expedition cruises, with a strong link to traditions, gastronomy and the tourist activities of each island, with a focus on attracting visitors in the low season. Explore the proximity of Madeira archipelago to attract this type of cruises.

A trip that will confirm the certainty that the visitor will have to return to the Azores and stay overnight in the region to fully experience and get to know it at their own pace.



### Product positioning in the market

A plus for anyone visiting the destination, is a sports fan and wants to experience in the Azores.

A destination where the courses stand out the sustainability of their management and the landscapes, which make practicing an unforgettable experience, with quality infrastructures that allow tournaments to be promoted outside the high season.



### Product positioning in the market

A break during your visit to the region.

It is an experience with a predominance of volcanic sand beaches and natural pools, designed by the volcanic rock and the ocean, where you can sunbathe and swim.



## STRATEGY FOR **ATTRACTING** **AUDIENCES**

We will implement a strategy to attract audiences that display behaviours that add value and allow us to consolidate the Azores' positioning as a certified sustainable nature tourism destination.



### **Markets**

with a history of relevant demand in the Azores, with the potential to increase dynamics in the low season and have profiles suited to the offer.

### **Segments**

that are highly interested in the Azores' product, suit the destination's positioning, display responsible travel behaviours, and want more participative visiting experiences.

AZORES  
**STRATEGIC  
PUBLIC**



## BETTING MARKETS

We have defined **4 betting levels** in the markets. Our priority will be markets of levels 1 and 2.

### PRIORITY MARKETS

#### LEVEL 1

Reinforce the commitment



#### Why?

Markets with a history of relevant demand, a propensity to consume and high growth potential.

- Portugal
- Germany
- USA
- Spain
- France
- Canada

#### LEVEL 2

Consolidate commitment



#### Why?

Markets with a history of relevant demand, a propensity for consumption and growth potential.

- Netherlands
- United Kingdom
- Italy
- Belgium

### COMPLEMENTARY MARKETS

#### LEVEL 3

Selected commitment



#### Why?

Markets with an intermediate market share, propensity to consume and the potential to diversify demand and mitigate seasonality.

- Switzerland
- Denmark
- Austria
- Sweden
- Finland
- Norway

### SECONDARY MARKETS

#### LEVEL 4

Exploring opportunities



#### Why?

Markets with low market share and medium/long-term growth potential.

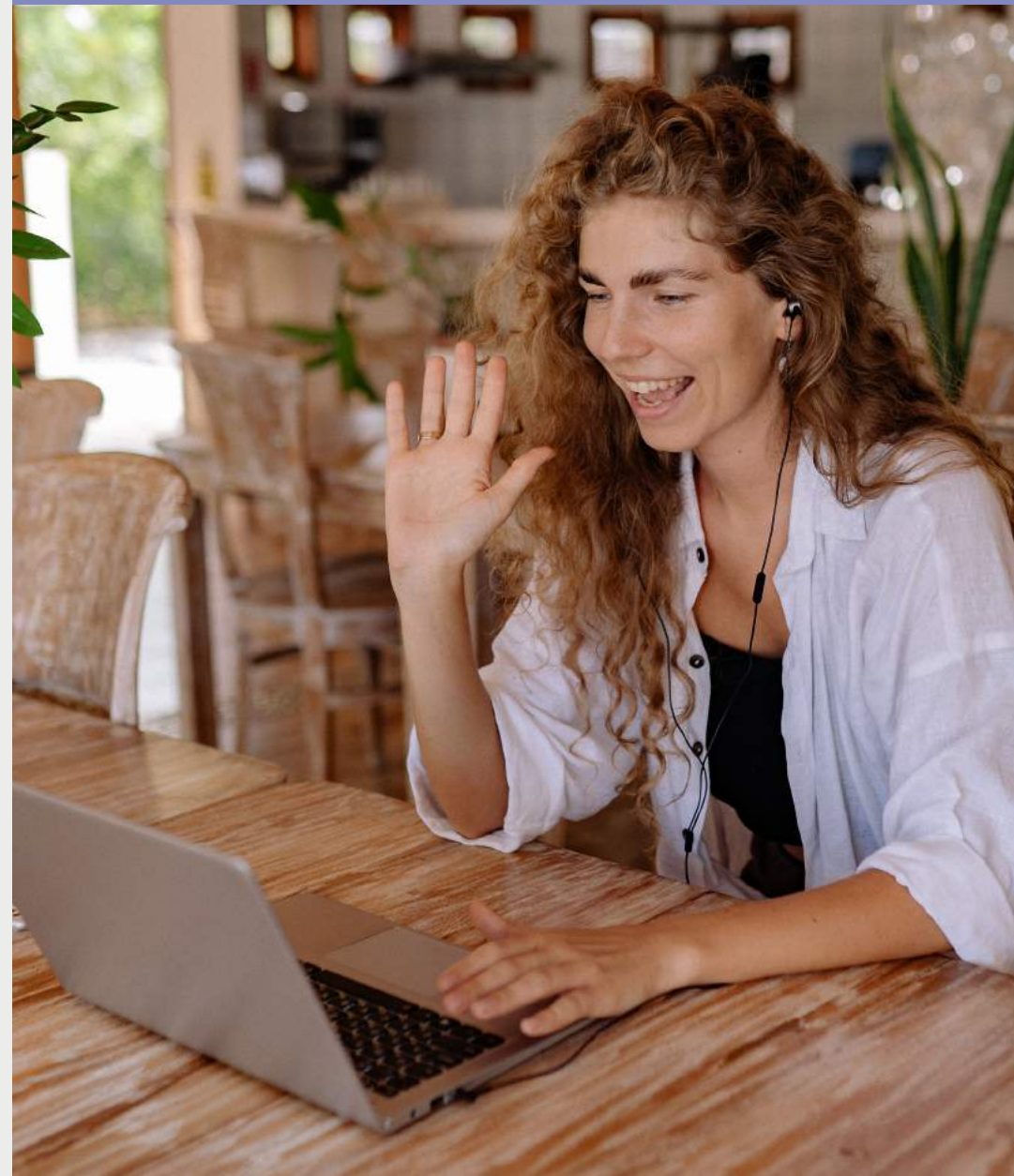
- Brazil
- Israel
- Czechia
- Poland
- Ireland
- Hungary
- Slovenia



## SEGMENTS

In the defined markets, we will attract **13 segments with behaviours and travel motivations** that can add value to the destination in a logic of full and responsible fruition.

### DIGITAL NOMADS



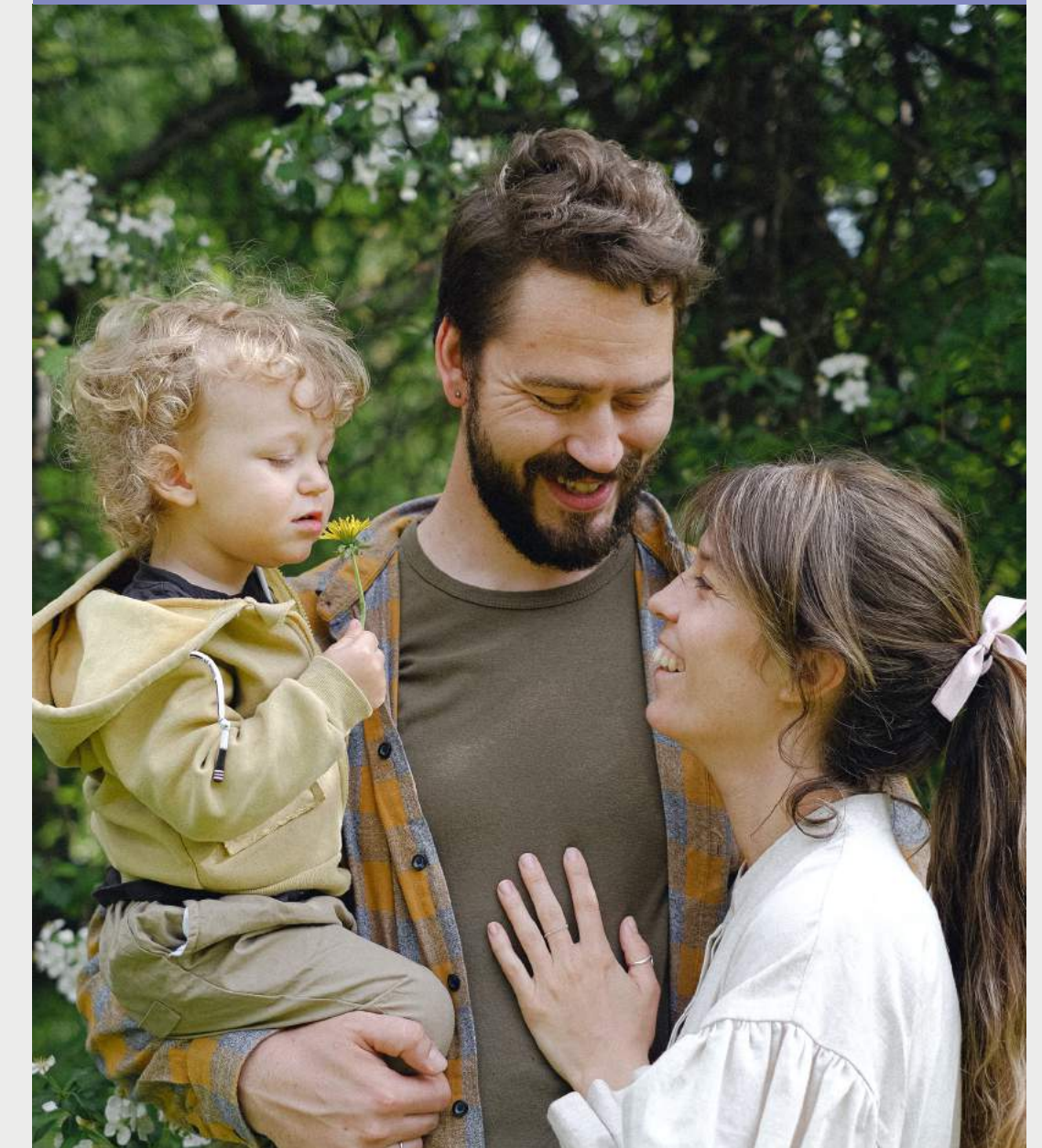
Digital nomads are independent individuals with a sense of freedom. They deviate from the standard 9-5 working pattern. They are usually freelancers or owners of their own business. The majority of this segment falls into the Millennial generation.

### EMPTY NESTERS



This segment includes people who start enjoying life and travel after their children leave home. They usually travel as a couple or with friends. They now travel to enjoy time alone with their spouse and/or friends.

### FAMILY MOMENT SEEKERS



This segment refers to couples with dependent children of school age. They aim to spend their leisure time in family and seek activities suitable for their children. They travel to strengthen their emotional bond.

The detailed characterisation of the 13 segments is available in the full version of the Strategic and Marketing Plan for Azores Tourism 2030.



### GROUP TRAVELLERS



People in this segment want to travel with their group of friends. They travel to disconnect from their working lives and/or to venture out to discover a new destination. They are looking for destinations that offer them security and diversity of offer.

### LONE WOLVES



People in this segment prefer to travel alone. They are usually young people from the Millennials and Z generations. They travel to self-reconnect and to acquire new knowledge about other realities and cultures.

### NATURE SPORTS LOVERS



Individuals who show a particular interest in sports activity, especially when it takes place in nature. They look for destinations that offer them the ideal conditions for practicing their sport of choice and that have a variety of complementary activities.

### NAUTICAL TRAVELLERS



They aim to get away from their work routine and get to know various destinations that offer ideal port conditions. This segment presupposes a dynamic of total freedom where no hours or places exist. They travel with family or friends.

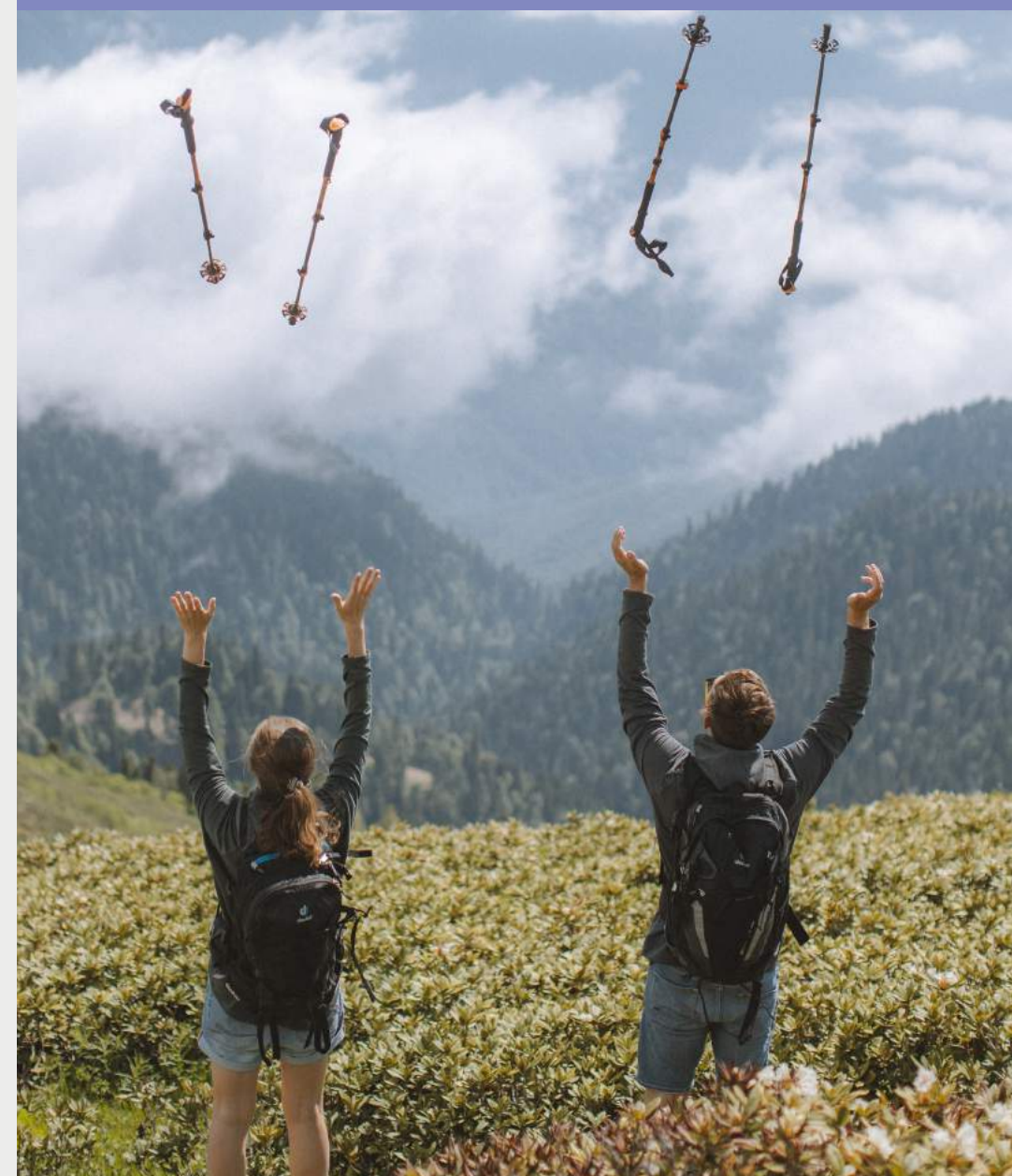


## OCEAN LOVERS



This segment includes individuals who are deeply interested in the sea and marine life. They are usually from the Millennial and Baby Boomer generations. They travel to discover marine life and observe different animal species.

## OUTDOOR ENTHUSIASTS



Individuals with an interest in nature and associated sports activities. They are usually spontaneous individuals. They travel in search of activities that challenge them and take place outdoors, in direct contact with nature.

## ROMANTIC ESCAPERS



Individuals that look for less busy places. They like to explore places little known, that transmit a sense of freedom and privacy for two. They travel to disconnect from their daily lives, to get to know a new place and a new culture in depth.

## ORIGINS SEEKERS



They are usually young adults looking to connect with their family roots and ancestors in the Azores. They come from countries with large diasporic communities, such as the USA, Canada, and Brazil.



## WELLBEING SEEKERS



Individuals who seek moments of relaxation and physical and/or mental well-being when travelling. They are concerned about their health and look for places where they can feel good when travelling.

## WILDLIFE DEEP RESEARCHERS



Individuals who show a deep interest in nature and animal life. Who study and research the various species and visit destinations in search of them. They visit the destination to analyse and discover behaviours of animal life.



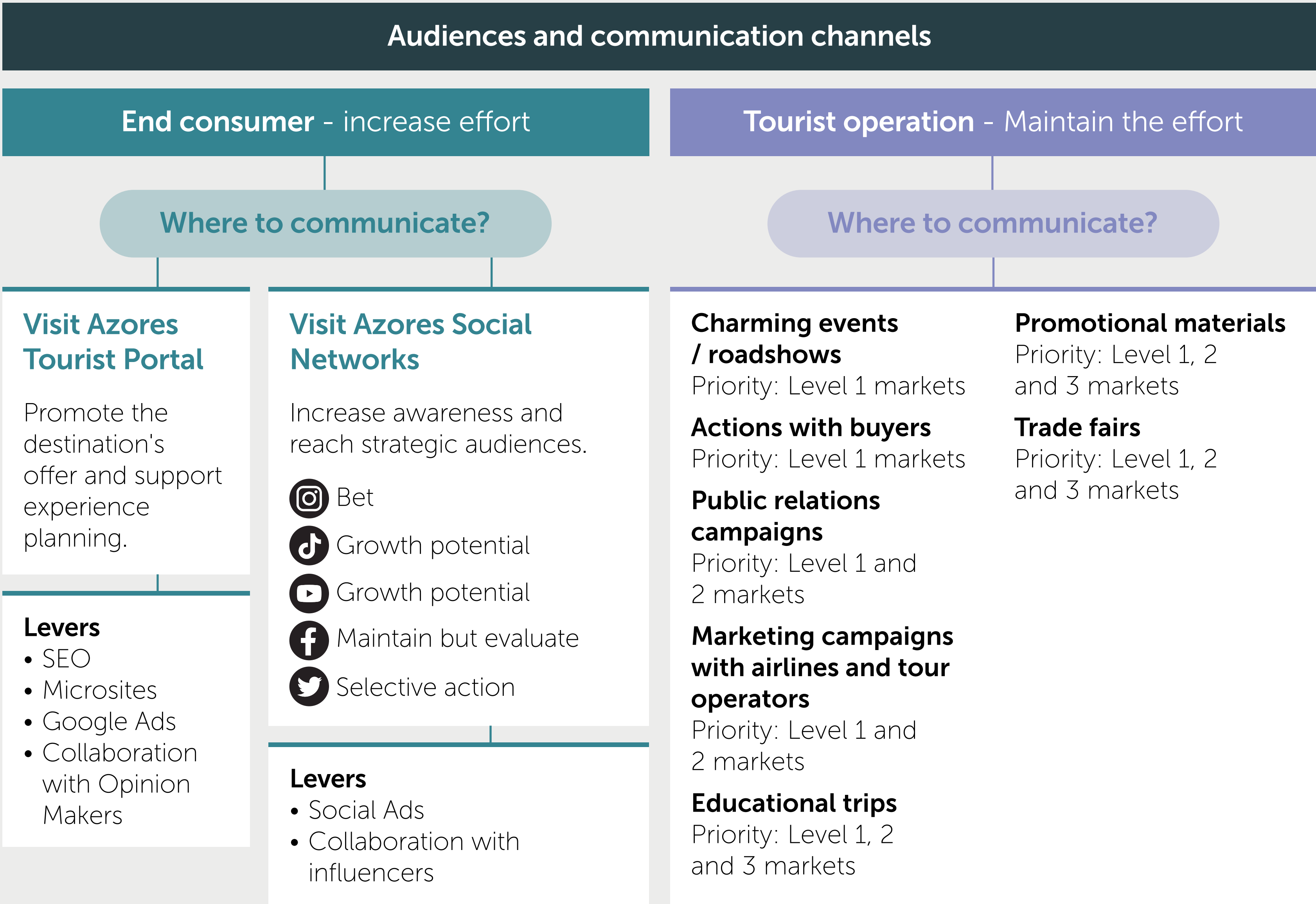


# EXTERNAL COMMUNICATION

In the Horizon 2030, we will increase our communication effort aimed at the end consumer, both at home and in the Azores.

Digital channels (internal and collaborative) will be privileged while maintaining the effort directed at the tourism operation, continuing to establish relationships of proximity and trust to sell the Azores to strategic audiences throughout the year.

Detailed guidelines for digital and traditional channels are available in the full version of the Strategic and Marketing Plan for Azores Tourism 2030.





# INTERNAL COMMUNICATION

We start from the premise that implementing the Azorean tourism strategy must always involve residents and economic agents, given the importance of their role in the sector's development. For this reason, we are committed to creating the most appropriate communication channels for exchanging ideas and key information.

## Audiences and communication channels



Residents



Economic agents

### Where to communicate?

#### Online - top priority

- Social Networks
- Online Government Portal
- Online regional press

#### Offline - selected activities

- Offline regional press
- Billboards and Mupis
- Meetings and/or public sessions

### Where to communicate?

#### Online - top priority

- Social Networks
- Online Government Portal
- Online regional press
- Webinars
- E-mail

#### Offline - selected activities

- Sectoral meetings
- Public sessions
- Offline regional press

Detailed guidelines for digital and traditional channels are available in the full version of the Strategic and Marketing Plan for Azores Tourism 2030.



# DISTRIBUTION

We have to ensure that the Azores' offer is distributed through various online and offline channels.

It is crucial to strengthen direct online distribution, in line with the growing importance of this channel for strategic segments that prefer to book their trips directly. At the same time, we must continue to strengthen the work of establishing commercial relationships with tour operators specialising in our strategic products, who are closer to the destination's target segments, and selling experiences that highlight the territory's natural and Cultural uniqueness.

	Online	Offline
Direct	Tour operators/travel agencies	Travel agencies
Indirect	Websites and other digital channels of tourism companies in the Azores	Direct contact with Azorean tourism companies

The detailed guidelines for the Distribution Policy by segment are available in the full version of the Strategic and Marketing Plan for Azores Tourism 2030.



## PRICE

We want the Azores' pricing policy to reflect the quality of the destination and its exclusivity. Tourists should recognise that the tourist experience on offer provides great value for money.

The qualification of the Azores as a tourist destination involves presenting ourselves to the market as a differentiated destination concerned with meeting and exceeding the expectations of our visitors. In the context of transparency and a desire for continuous improvement, which should be evident in the actions of all the players in Azorean tourism, it is essential to make every effort to achieve a premium price policy that does justice to the quality and exclusivity of the Azores.

The detailed guidelines for the Distribution Policy by segment are available in the full version of the Strategic and Marketing Plan for Azores Tourism 2030.

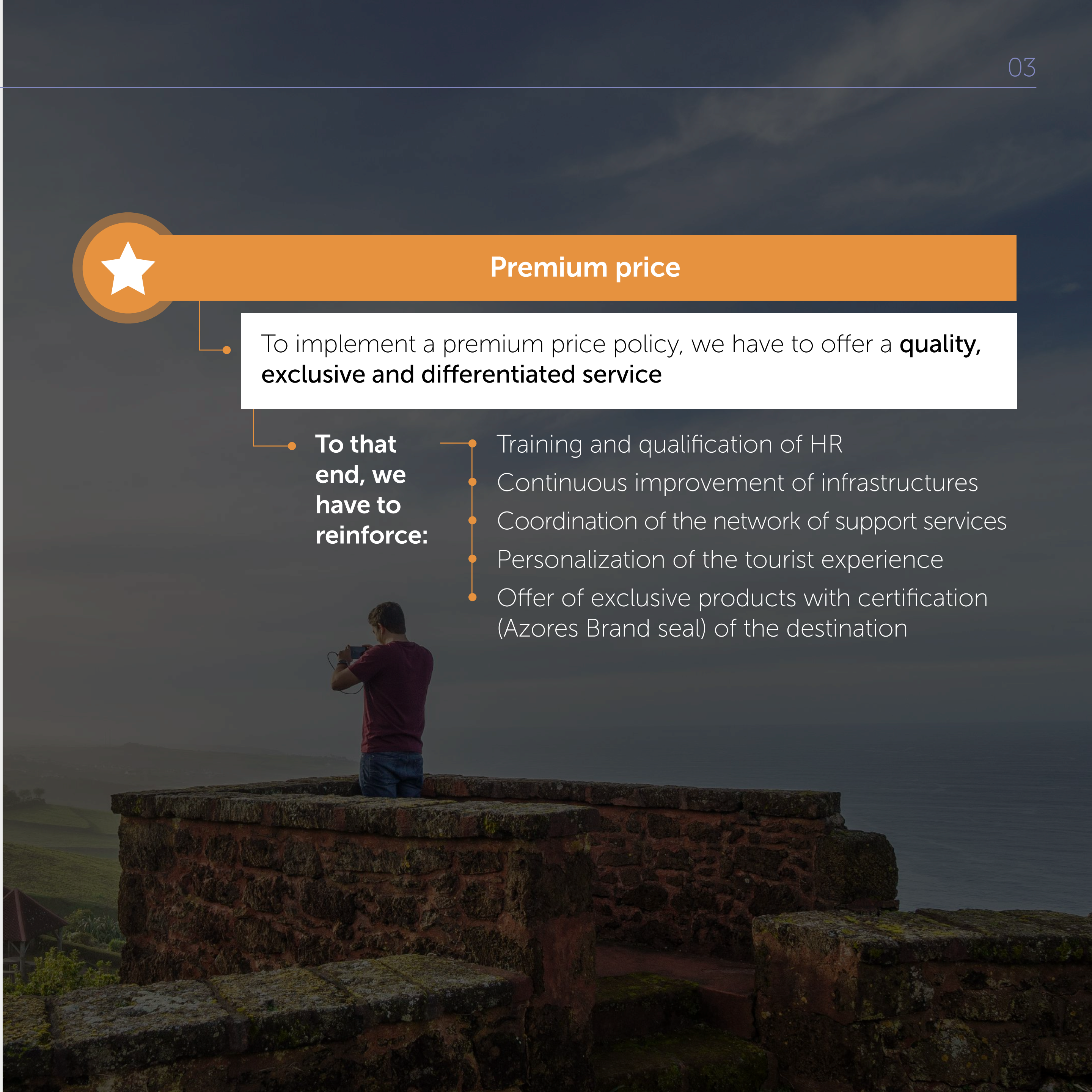


### Premium price

To implement a premium price policy, we have to offer a **quality, exclusive and differentiated service**

**To that end, we have to reinforce:**

- Training and qualification of HR
- Continuous improvement of infrastructures
- Coordination of the network of support services
- Personalization of the tourist experience
- Offer of exclusive products with certification (Azores Brand seal) of the destination





## 04

## How we are going to boost tourism in the 9 Azorean islands

The 2030 Tourism Strategy presupposes the integrated development of the offer of the 9 islands, considering the different stages of development; their specificities in terms of current and potential offer, according to their natural and built resources; and the market segments most likely to visit and enjoy them.

**It is the uniqueness of each island that makes the 'Azores whole' a special and unparalleled destination.**

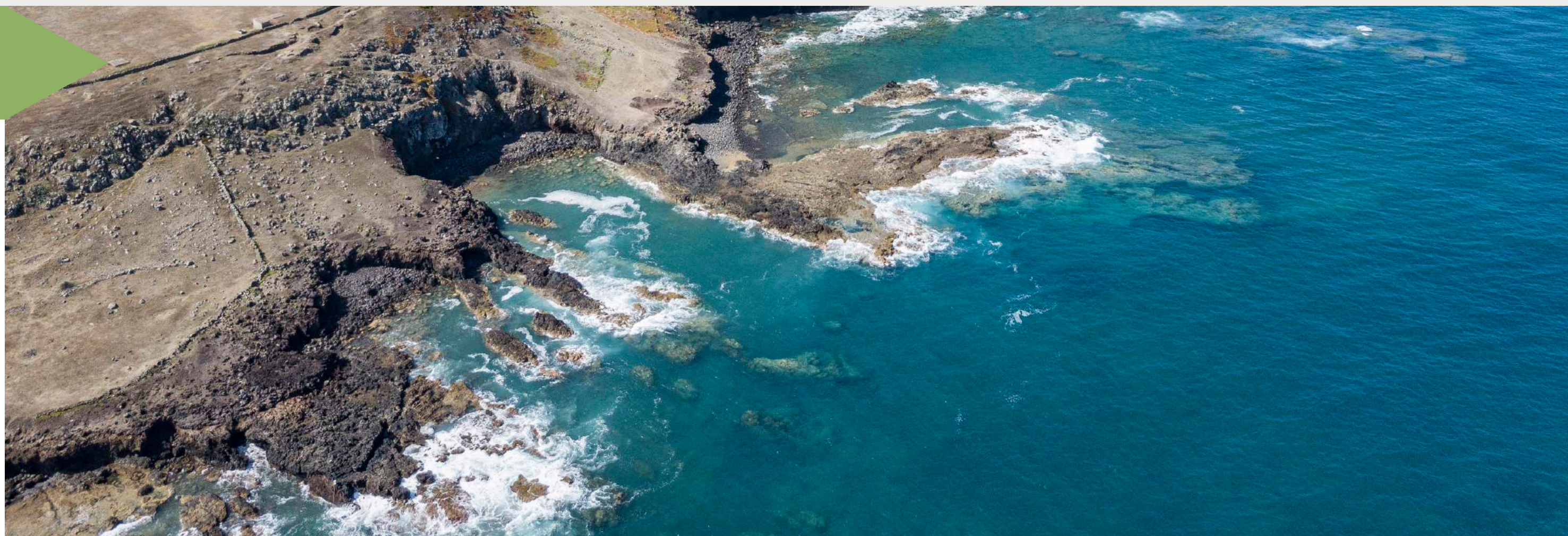
It is in this context and in the assumption of the destination's global positioning, that the strategic guidelines for each island have been defined.



# SANTA MARIA

## Strategic Recommendation

Strengthen attractiveness and promotion with the end consumer and tour operators in the main markets. Explore the proximity to São Miguel Island in the middle and low seasons, promoting the distribution of flows to Santa Maria Island and the offer complementarity between islands, aiming to reduce the seasonality rate.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Culture
Sun and Sea	Wellbeing
	Gastronomy and wines

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Cycling • Geotourism • Hiking • Diving • Sport fishing • Snorkeling • Trekking	Canyoning • Sailing charter • Coasteering • Yachting • Boat trip • Stand Up Paddle • Surf • Trail Running • Sailing	Climbing • Birdwatching • Whale Watching • Paragliding • Horse Riding • Surf • Photo Tours
<b>Culture</b>	Visits to museums and monuments	Thematic Routes • Culturel Touring • Culturel Walking Tours	Hands-on experiments / Workshops • Photo Tours
<b>Gastronomy and wines</b>			Gastronomic Itineraries • Wine Tours • Gastronomic Tours • Visits to wine producers • Workshops
<b>Wellbeing</b>			Mindfulness • Pilates • Tai-chi • Yoga



## SANTA MARIA

### STRATEGIC AUDIENCES

#### PRIORITY MARKETS

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • United States of America • Spain • France	Canada
<b>Level 2</b> Maintain Bet		Netherlands • United Kingdom • Italy • Belgium

#### BETTING SEGMENTS

Empty Nesters	Outdoor Enthusiasts
Family Moments Seekers	Origins Seekers
Nature Sports Lover	Wellbeing Seekers
Ocean Lovers	Wildlife Deep searchers

### ELEMENTS TO MAKE UP THE MESSAGE/ISLAND

#### DIFFERENTIATING ELEMENTS

- Signposted network for mountain biking
- Network of approved walking routes, including a Great Route
- Endemic bird - subspecies of the Starling (*R. regulus sanctamariae*) - Europe's smallest bird
- The presence of manta rays and whale sharks for diving and snorkelling
- Mild climate with more light - known as the Island of the Sun
- White sandy beaches
- Geosites - Distinctive geological landscape at archipelago level such as Barreiro da Faneca; Pedreira do Campo; Poço da Pedreira; Ponta do Castelo and Ribeira do Maloás)
- Aveiro Waterfall, the largest waterfall in Portugal, approximately 110 metres high
- Palaeopark - fossil deposits
- Awe-inspiring bays
- Surfing spots
- History (e.g. first island discovered, stories of pirates and corsairs, sailed by Christopher Columbus)
- Architectural landscape - typical houses
- Unique wine-growing landscape
- Music festivals such as Maré de Agosto and Santa Maria Blues
- Distinctive local products: Santa Maria honeydew and wild game sausage (alheira)
- Sweets and Bakery: 'Orelha' biscuits, 'Cavacas', Brandy biscuits
- Gastronomy: Bolo na Panela (pan cake); Turnip soupe, among others

#### APPEALS

- Resting
- Contemplation (coast)
- Landscape diversity
- Aquatic adventure
- Scientific research



# SÃO MIGUEL

## Strategic Recommendation

Consolidation of national and international connectivity, reinforced in the medium and low seasons, promoting the extension of the summer operation period. Stimulating and streamlining the distribution of flows within the island and to other islands in a structured and robust way.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Wellbeing
Gastronomy and wines	Golf
Culture	Meeting Industry
Sun and Sea	
Cruises	

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Canyoning • Sailing Charter • Cycling • Geotourism • Hiking • Yachting • Diving • Birdwatching • Whale Watching • Boat trips • Horse Riding • Sports fishing • Surf • Snorkeling • Stand Up Paddle • Trail Running • Sailing	Canoeing/ Kayaking • Coaststeering • Speleology • Paragliding • Trekking • Wakeboard	Climbing • Kitesurf/ Windsurf • Recreational fishing • Photo Tours
<b>Culture</b>	City Walking Tours • Culturel Touring • Visits to museums and monuments	Artistic Residencies • Thematic Routes • Photo Tours	Hands-on experiments / Workshops • Photo Tours
<b>Gastronomy and wines</b>		Gastronomic Itineraries • Gastronomic Tours	Wine Tours • Visits to wine producers • Workshops
<b>Wellbeing</b>	Hydrothermal Spas • Natural Spas • Thermal spas		Mindfulness • Pilates • Thalassotherapy • Tai-chi • Yoga



## SÃO MIGUEL

### STRATEGIC AUDIENCES

#### PRIORITY MARKETS

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • United States of America • Spain • France	Canada
<b>Level 2</b> Maintain Bet	Netherlands	United Kingdom • Italy • Belgium

#### BETTING SEGMENTS

Digital Nomads	Ocean Lovers
Empty Nesters	Outdoor Enthusiasts
Family Moments Seekers	Romantic Escapers
Group Travellers	Origins Seekers
Lone Wolves	Wellbeing Seekers
Nature Sports Lovers	Wildlife Deep Researchers
Nautical Travellers	

### ELEMENTS TO MAKE UP THE MESSAGE/ISLAND

#### DIFFERENTIATING ELEMENTS

- Endemic bird - Priolo (pyrrhula murina)
- Resident and migratory cetaceans (whales and dolphins) throughout the year for observation;
- Approved network of footpaths
- Network of streams and waterfalls for canyoning
- Historic gardens (Terra Nostra, José do Canto, António Borges, Sant'Ana, ...)
- Fumaroles and boilers, springs, waterfalls and thermal hot water pools
- Black sand beaches
- Surfing spots
- Ferraria Natural Pools (naturally heated seawater) and Vila Franca Islet
- Lagoons and calderas: Lagoa das Sete Cidades (one of the 7 Natural Wonders of Portugal), Fogo and Furnas - mighty landscapes
- Geosites of national and international importance (Furnas volcano caldera; Sete Cidades volcano caldera; Fogo volcano caldera; Caldeira Velha; Vila Franca islet; Ponta da Ferraria and Pico das Camarinhas)
- Different local products: Tea, pineapple and passion fruit
- Gastronomy: Furnas Stew (cooked with the steam of the earth); Regional Steak
- Bakery and sweets: (cheese cake/ queijadas from Vila Franca do Campo, "Esperanças", Lêvedo cake, "Fofas" from Povoação)
- Religious heritage (Senhor Santo Cristo dos Milagres, Espírito Santo, Romeiros, Jewish heritage)
- Music festivals and other Cultural events
- Festivities and popular events (Carnival, São João da Vila, Cavalhadas de São Pedro)

#### APPEALS

- Cosmopolitan
- Diversity
- Contemplation (landscape)
- Wellbeing
- Adventure
- Patrimony



# TERCEIRA

## Strategic Recommendation

Encourage the attraction of new national and international routes that boost overnight stays throughout the year, in line with the supply and installed capacity and the ability to distribute flows to other islands.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Wellbeing
Culture	Meeting Industry
Gastronomy and wines	Cruises
Sun and Sea	Golf

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Cycling • Geotourism • Hiking • Yachting • Diving • Whale Watching • Boat trips • Horse Riding • Sport fishing • Snorkeling • Surf	Canoeing/ Kayaking • Sailing Charter • Speleology • Birdwatching • Stand Up Paddle • Trail Running	Canyoning • Coasteering Kitesurf/Windsurf • Photo Tours • Trekking
<b>Culture</b>	City Walking Tours • Cultural Touring • Visits to museums and monuments	Artistic Residencies • Thematic Routes • Photo Tours	Religious Itineraries
<b>Gastronomy and wines</b>		Gastronomic Itineraries • Gastronomic Tours	Wine tourism Itineraries • Wine Tours • Visit to wine producers • Workshops
<b>Wellbeing</b>		Mindfulness • Pilates • Yoga	Hydrothermal Spaces • Tai-chi



## TERCEIRA

### STRATEGIC AUDIENCES

#### PRIORITY MARKETS

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • United States of America • Spain • Canada	France
<b>Level 2</b> Maintain Bet		Netherlands • United Kingdom • Belgium • Italy

#### BETTING SEGMENTS

Digital Nomads	Ocean Lovers
Empty Nesters	Outdoor Enthusiasts
Family Moments Seekers	Romantic Escapers
Group Travellers	Origins Seekers
Lone Wolves	Wellbeing Seekers
Nature Sports Lovers	Wildlife Deep Researchers
Nautical Travellers	

IPDT 2023 Analysis.

### ELEMENTS TO MAKE UP THE MESSAGE/ISLAND

#### DIFFERENTIATING ELEMENTS

- Historic Centre of Angra do Heroísmo - UNESCO heritage site since 1983
- Geosites of national and international importance: Algar do Carvão, Caldeira de Santa Bárbara and Mistérios Negros; Monte Brasil; Pico Alto, Biscoito Rachado and Biscoito da Ferraria
- Volcanic cavities for the practice of speleology
- Signposted network for mountain biking
- Network of approved walking routes, including a Great Route
- Resident and migratory cetaceans (whales and dolphins) all year round to watch
- Birdwatching spots
- Bathing areas / Natural pools
- Surfing spots
- Denomination of Origin (DO) wine-growing area: Biscoitos
- Angra Bay Underwater Archaeological Park
- Relevant historical legacy related to the history of Portugal
- Military Heritage
- Religious Heritage and Events: Angra do Heroísmo Cathedral, Convents, Churches, Empires and Holy Spirit
- Festivities and popular events (Sanjoaninas, Beach Festivities, Carnival)
- Distinctive local products: Verdelho wine, buttery cheese
- Gastronomy: Alcatra, Regional Steak, alfenim, Conde da Praia
- Popular architecture Ramo Grande
- Bullfighting heritage, Ganadarias,
- Rope Bullfighting, Square Bullfighting
- Music festivals: ANGRAJAZZ

#### APPEALS

- World Heritage
- Culture and tradition
- Entertainment
- Gastronomic tradition



# GRACIOSA

## Strategic Recommendation

Strengthen attractiveness and promotion with the end consumer and tour operators in the main markets. Explore the proximity to Terceira Island in the middle and low seasons, promoting the distribution of flows to Graciosa Island and the complementarity offer between islands, aiming to reduce the seasonality rate.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Gastronomy and wines
Sun and Sea	Culture
	Wellbeing

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Geotourism • Hiking • Diving • Snorkeling	Sailing Charter • Yachting • Boat trips • Sport fishing • Stand Up Paddle • Surf • Sailing	Canoeing/ Kayaking • Coastering • Cycling • Speleology • Kitesurf/ Windsurf • Birdwatching • Cetacean Watching • Paragliding • Horse Riding • Photo Tour • Trail Running
<b>Culture</b>	Culturel Touring • Visits to museums and monuments	Thematic Routes	Hands-on experiments / Workshops
<b>Gastronomy and Wines</b>			Gastronomic routes • Wine tourism routes • Wine Tours • Gastronomic Tours • Visit to wine producers • Workshops
<b>Wellbeing</b>	Hydrothermal Spaces • Thermal baths		Mindfulness • Pilates • Natural spas • Yoga



## GRACIOSA

### STRATEGIC AUDIENCES

#### PRIORITY MARKETS

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • United States of America	Canada • Spain • France
<b>Level 2</b> Maintain Bet	Italy	Netherlands • United Kingdom • Belgium

#### BETTING SEGMENTS

Empty Nesters	Outdoor Enthusiasts
Naure Sports Lovers	Origins Seekers
Nautical Travellers	Wellbeing Seekers
Ocean Lovers	Wildlife Deep Researchers

### ELEMENTS TO MAKE UP THE MESSAGE/ISLAND

#### DIFFERENTIATING ELEMENTS

- Biosphere Reserve - UNESCO, since 2007
- Geosites of national and international importance: Caldeira and Furna do Enxofre; Ponta da Barca and Ilhéu da Baleia; Porto Afonso and Redondo Ponta do Carapacho, Ponta da Restinga and Ilhéu de Baixo
- Approved walking route network
- Denomination of Origin (DO) wine-growing area: DO Graciosa
- Termas do Carapacho, classified natural mineral water
- Endemic seabird - Painho de Monteiro
- Dwarf Donkey - Native breed
- Variety of Diving Spots
- Surfing spots
- Popular rural architecture, such as windmills
- Manor Houses (Solares) in Santa Cruz da Graciosa
- Distinctive local products: verdelho wine, honeydew, spirulina and garlic
- Sweets and bakery: cheese cake/ queijadas from Graciosa, rice cakes
- Festivals and popular events (Carnival, Bullfighting)
- Religious heritage and events: Senhor Santo Cristo do Milagres

#### APPEALS

- Animation
- Wellbeing
- Rest
- Rurality



# SÃO JORGE

## Strategic Recommendation

Strengthen attractiveness and promotion with the end consumer and tour operators, attracting markets, including domestic, capable of contributing to reduce the seasonality rate. Benefit from its geographical proximity and connectivity with the two other islands of the triangle (Pico and Faial), aiming to complement the offer.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Culture
Gastronomy and wines	Wellbeing
Sun and Beach	

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Canyoning • Sailing Charter • Geotourism • Hiking • Snorkeling • Surf • Trekking • Sailing	Canoeing/ Kayaking • Coastering • Cycling • Yachting • Diving • Boat trips • Sport fishing • Trail Running	Speleology • Kitesurf/Windsurf • Birdwatching • Paragliding • Horse Riding • Stand Up Paddle • Photo Tour
<b>Culture</b>	Culturel Touring • Visits to museums and monuments	Thematic Routes	Artistic Residencies • Photo Tour
<b>Gastronomy and Wine</b>		Gastronomic routes	Wine tourism routes • Gastronomic Tours • Visit to wine producers • Workshops
<b>Wellbeing</b>		Mindfulness • Pilates • Yoga	



## SÃO JORGE

### STRATEGIC AUDIENCES

#### PRIORITY MARKETS

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • United States of America • France	Canada • Spain
<b>Level 2</b> Maintain Bet	Netherlands • Italy	United Kingdom • Belgium

#### BETTING SEGMENTS

Digital Nomads	Nautical Travellers
Empty Nesters	Ocean Lovers
Family Moment Seekers	Outdoor Enthusiasts
Lone Wolves	Origins Seekers
Nature Sports Lovers	

### ELEMENTS TO MAKE UP THE MESSAGE/ISLAND

#### DIFFERENTIATING ELEMENTS

- UNESCO Biosphere Reserve, Fajãs de São Jorge, since 2016
- Network of approved walking routes, including a Great Route
- Geosites of national and international importance: Arriba das Fajãs dos Vimes - São João; Fajãs dos Cubres and Caldeira do Santo Cristo; Morro de Velas and Morro de Lemos
- Streams and waterfalls suitable for canyoning (advanced level)
- Surfing spots (Fajã dos Cubres, Feiticeiras, Fajã de Santo Cristo, Fajã dos Vimes)
- Natural pools, such as Poça Simão Dias
- 7 Natural Wonders of Portugal Award: Sea Villages - Fajã dos Cubres
- Sweets and bakery: "espécies" from São Jorge
- Distinctive local products: São Jorge cheese, tuna, yams and coffee
- Gastronomy: clams from Fajã de Santo Cristo, limpets, sausage, turnip broth
- Religious heritage and events: Holy Spirit

#### APPEALS

- Adventure
- Discovery
- Amazement
- Retreat
- Gastronomy
- Archipelago feeling - islands close to the central group



# PICO

## Strategic Recommendation

Capturing markets, including internal, capable of contributing to reducing the seasonality rate. Benefit from its geographical proximity and connectivity with the two other islands of the triangle (São Jorge and Faial), aiming to complement the offer.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Culture
Gastronomy and wines	Wellbeing
Sun and Sea	Meeting Industry

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Sailing Charter • Geotourism Hiking • Yachting • Diving • Cetacean Watching • Boat trips • Sport fishing • Snorkeling • Trekking • Sailing	Cycling • Speleology Birdwatching • Paragliding • Horse Riding • Trail Running	Canoeing/ Kayaking • Coasteering • Climbing • Kitesurf/Windsurf • Stand Up Paddle • Surf • Photo Tour
<b>Culture</b>	Cultural Touring • Visits to museums and monuments	Artistic Residencies • Thematic Routes	Photo Tour
<b>Gastronomy and Wine</b>	Wine tourism routes • Visit to wine producers	Gastronomic routes • Wine Tours	Gastronomic Tours • Visit to wine producers • Workshops
<b>Wellbeing</b>			Mindfulness • Pilates • Yoga



**PICO**

**STRATEGIC AUDIENCES**

**PRIORITY MARKET**

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • United States of America • France	Canada • Spain
<b>Level 2</b> Maintain Bet	Netherlands • Italy	United Kingdom • Belgium

**BETTING SEGMENTS**

Digital Nomads	Ocean Lovers
Empty Nesters	Outdoor Enthusiasts
Family Moment Seekers	Romantic Escapers
Group Travellers	Origins Seekers
Lone Wolves	Wellbeing Seekers
Nature Sports Lovers	Wildlife Deep Researchers
Nautical Travellers	

**ELEMENTS TO MAKE UP THE MESSAGE/ISLAND**

**DIFFERENTIATING ELEMENTS**

- Pico Mountain - Portugal's highest mountain (2351m), with conditions for trekking
- Geosites of national and international importance: Fajã lávica of Lajes do Pico; Ilhéus da Madalena; Lajido de Santa Luzia; Montanha; Ponta da Ilha;
- Gruta das Torres: the largest lava tube in Portugal
- Approved walking route network
- Pico Vineyard Cultural Landscape - UNESCO Heritage Site since 2004
- Denomination of Origin (DO) wine-growing area: DO Pico
- Volcanic cavities for caving
- Popular rural architecture: Adegas do Pico
- Resident and migratory cetaceans (whales and dolphins) throughout the year to watch
- Whaling Heritage - Whalers' Museum, Whaling Industry Museum, Lookouts, Whaling Boat Races, Centre for the Arts and Sciences of the Sea – CIBL
- Religious heritage and events: Espírito Santo, Bom Jesus do Pico
- Distinctive local products: wines, liqueurs, brandies, figs, cheese
- Gastronomy: sausage with yams, Patinha herb, fish broth and meat sauce
- Sweets and Bakery: Corn cake, Corn bread, Vespers and Rosquilhas
- Chamarrita
- Natural pools/bathing areas

**APPEALS**

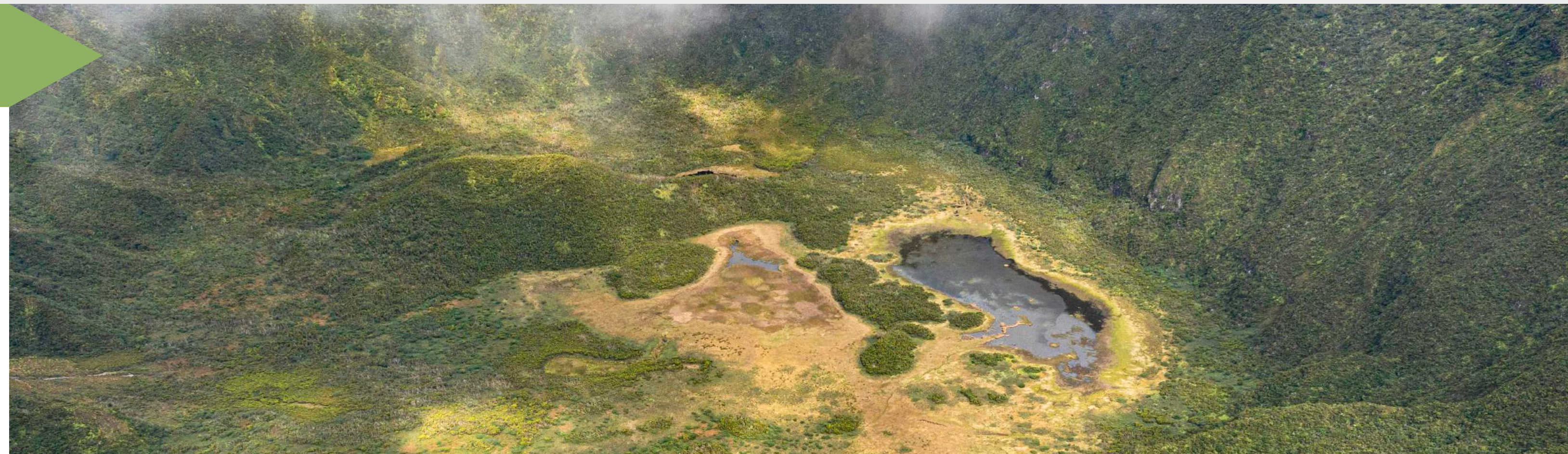
- Adventure
- Discovery
- Amazement
- Retreat
- Gastronomy
- Archipelago feeling - islands close to the central group



# FAIAL

## Strategic Recommendation

Capture markets, including domestic, capable of helping reduce seasonality. Benefit from the geographical proximity and connectivity with the two other islands of the triangle (São Jorge and Pico), aiming to complement the offer.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Wellbeing
Culture	Gastronomy and wines
Sun and Sea	Meeting Industry
Cruises	

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Canoeing / Kayaking • Sailing Charter • Geotourism • Hiking • Yachting • Diving Cetacean Watching • Boat trips • Sport fishing • Snorkeling • Trail Running • Trekking • Sail	Canyoning • Coasteering Cycling • Birdwatching • Paragliding • Horse Riding	Kitesurf/Windsurf • Stand Up Paddle • Surf • Photo Tour
<b>Culture</b>	City Walking Tours • Cultural Touring • Visits to Museums and Monuments	Artistic Residencies • Thematic Routes	Photo Tour
<b>Gastronomy and Wine</b>		Gastronomic routes	Wine tourism routes • Gastronomic Tours • Visit to wine producers • Workshops
<b>Wellbeing</b>		Mindfulness • Pilates • Yoga	Hydrothermal baths



**FAIAL**

**STRATEGIC AUDIENCES**

**PRIORITY MARKETS**

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • United States of America • France	Canada • Spain
<b>Level 2</b> Maintain Bet	Netherlands • Italy	United Kingdom • Belgium

**BETTING SEGMENTS**

Digital Nomads	Ocean Lovers
Empty Nesters	Outdoor Enthusiasts
Family Moment Seekers	Origins Seekers
Nature Sports Lovers	Wildlife Deep Researchers
Nautical Travellers	

**ELEMENTS TO MAKE UP THE MESSAGE/ISLAND**

**DIFFERENTIATING ELEMENTS**

- Geosites of national and international interest: Vulcão dos Capelinhos, Caldeira do Faial; Graben de Pedro Miguel; Monte da Guia and Porto Pim; Morro do Castelo Branco; and Costado da Nau
- Network of approved walking routes, including a Great Route
- Horta Botanical Garden
- Bathing areas: beaches and natural pools
- Horta City - Cosmopolitan and characterised by its Art Deco style
- Marina internationally known as a stopover for sailors on the Atlantic crossing, associated with the iconic Peter's Café Sport
- Resident and migratory cetaceans (whales and dolphins) all year round to watch
- Historical evidence of the importance of the Azores' geographical position: submarine cables and aviation
- Whaling Heritage - Porto Pim whaling factory, beaching ramps, whaling boat races, whaling boat houses, Scrimshaw Museum
- Horta Bay: Destination EDEN, most beautiful bay in the world
- Music festivals and other cultural events
- Religious Heritage - Holy Spirit
- Distinctive local products: Cheese, battered dough, sausage and yams
- Gastronomy: octopus stewed in red wine, fish broth and stews
- Sweets and bakery: "Fofas"

**APPEALS**

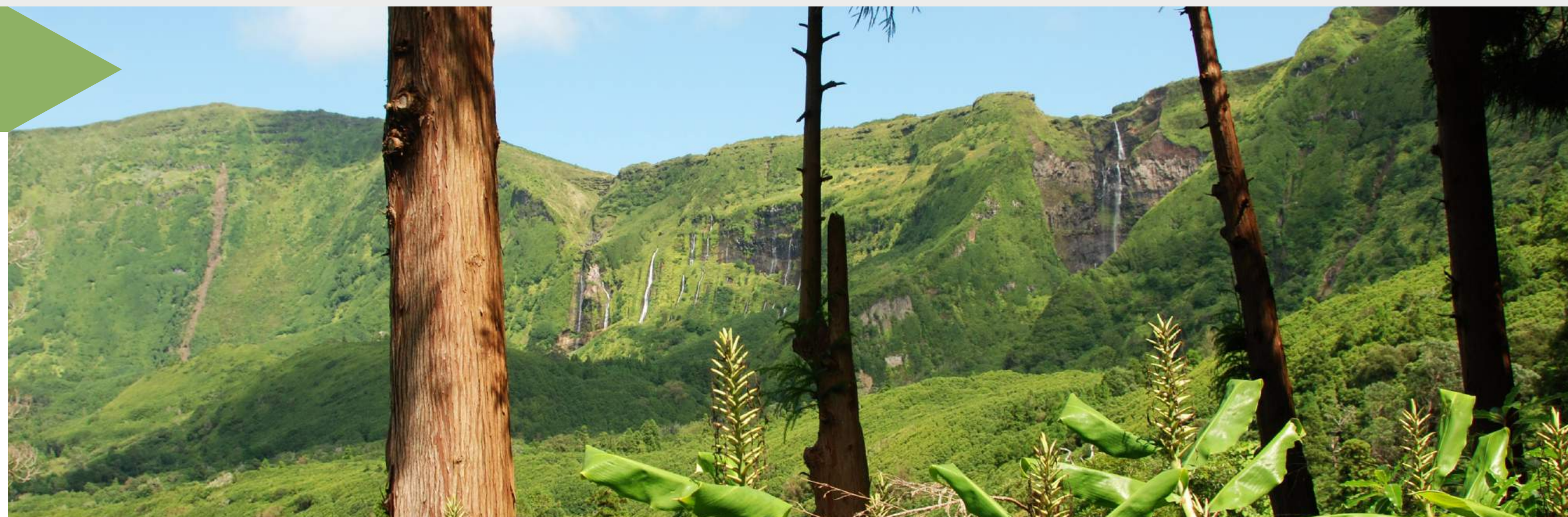
- Meeting Point
- Socialising
- Nautical History
- Contemporary culture-history
- Archipelago feeling - islands close to the central group
- Discovery



# FLORES

## Strategic Recommendation

Strengthen attractiveness and promotion with the final consumer and tour operators in the main markets, especially in the middle and low seasons. Benefit from the geographical proximity and connectivity with the island of Corvo, aiming to complement the offer between the two islands.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Culture
Sun and Sea	Gastronomy and wines
	Wellbeing

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Canyoning • Geotourism • Hiking • Birdwatching • Boat trips • Snorkeling • Trekking	Coasteering • Yachting • Diving • Sport fishing • Photo Tour	Canoeing / Kayaking • Sailing Charter • Cycling • Kitesurf/ Windsurf • Cetacean watching • Paragliding • Horse Riding • Stand Up Paddle • Trail Running • Sailing
<b>Culture</b>	Photo Tour • Visits to museums and monuments	Thematic Routes • Cultural Touring	Hands-on experiments / Workshops
<b>Gastronomy and Wine</b>			Gastronomic routes • Wine tourism routes • Gastronomic Tours • Visit to wine producers • Workshops
<b>Wellbeing</b>			Mindfulness • Pilates • Yoga



# FLORES

## STRATEGIC AUDIENCES

### PRIORITY MARKETS

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • United States of America • France • Spain	Canada
<b>Level 2</b> Maintain Bet	Belgium • Italy	Netherlands • United Kingdom

### BETTING SEGMENTS

Empty Nesters	Outdoor Enthusiasts
Family Moment Seekers	Origins Seekers
Lone Wolves	Wellbeing Seekers
Nature Sports Lovers	Wildlife Deep Researchers
Ocean Lovers	

## ELEMENTS TO MAKE UP THE MESSAGE/ISLAND

### DIFFERENTIATING ELEMENTS

- Biosphere Reserve - UNESCO since 2009
- Geosites of national and international interest: Caldeiras Negra, Comprida, Seca and Branca; Caldeiras Rasa and Funda das Lajes; Fajã Grande and Fajãzinha; Rocha dos Bordões
- Network of streams equipped for canyoning (advanced level)
- A network of approved pedestrian walks with a Great Route
- Exuberant nature, with lush landscapes, waterfalls, caves/coastal caves
- Internationally recognized island for birdwatching - American and European rarities migrating from western Europe
- Whaling Heritage - Museum of the Whale Factory of Boqueirão
- Underwater heritage: Slavonia Archaeological Park
- Gastronomy: fish, pork in brine, yam with sausage and watercress soup, herb pies

### APPEALS

- Adventure
- Contemplation
- Evasion
- Rest
- Discovery



# CORVO

## Strategic Recommendation

Strengthen attractiveness and promotion with the final consumer and tour operators in the main markets, especially in the middle and low seasons. Benefit from the geographical proximity and connectivity with the island of Flores, aiming to complement the offer between the two islands.



PRODUCTS	
Consolidated	Development potential
Nature, Land and Sea	Culture
Sun and Sea	Gastronomy and wines
	Wellbeing

ACTIVITIES	Consolidated	Under development	Development potential
<b>Nature, Land and Sea</b>	Geotourism • Hiking • Birdwatching	Snorkeling • Photo Tour	Canoeing / Kayaking • Sailing Charter • Coastering • Cycling • Yachting • Kitesurf/ Windsurf • Diving • Cetacean watching • Paragliding • Horse Riding • Sport fishing • Stand Up Paddle • Trail Running • Sailing
<b>Culture</b>	Visits to museums and monuments	Photo Tour • Thematic Routes • Cultural Touring	Hands-on experiences / Workshops (gastronomic, agricultural, arts and crafts...)
<b>Gastronomy and Wines</b>			Gastronomic routes • Wine tourism routes • Gastronomic Tours • Visit to wine producers • Workshops
<b>Wellbeing</b>			Mindfulness • Pilates • Yoga



## CORVO

### STRATEGIC AUDIENCES

#### PRIORITY MARKETS

	Greater presence on the island presently	Development Potential
<b>Level 1</b> Reinforce Bet	Portugal • Germany • France • Spain	United States of America • Canada
<b>Level 2</b> Maintain Bet	Italy	Netherlands • United Kingdom • Belgium

#### BETTING SEGMENTS

Family Moment Seekers	Origins Seekers
Lone Wolves	Wellbeing Seekers
Outdoor Enthusiasts	Wildlife Deep Researchers

### ELEMENTS TO MAKE UP THE MESSAGE/ISLAND

#### DIFFERENTIATING ELEMENTS

- Biosphere Reserve - UNESCO since 2007
- Internationally renowned island for birdwatching - American and European migratory rarities
- Corvo Wild Bird Interpretation Centre
- Approved Walking Route Network
- Wooden caps and locks
- Geosites of regional, national and international interest: Caldeirão
- First voluntary marine reserve: Carreiro dos Meros Ecomuseum
- Windmills
- Town & Population
- Gastronomy: oven-roasted albacore, erva patinha pie

#### APPEALS

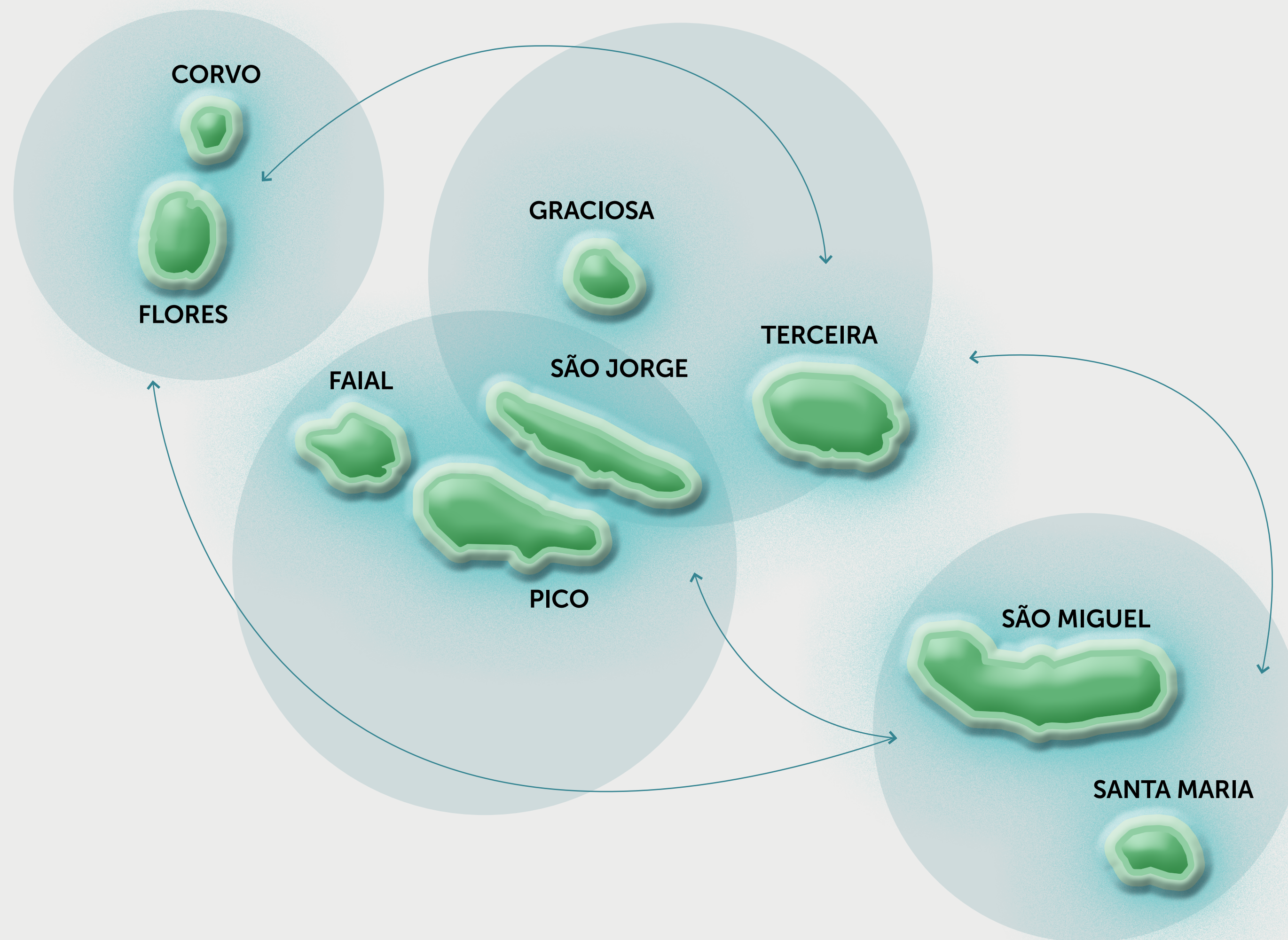
- Isolation
- Rest
- Culture
- Sense of community



## DISTRIBUTION OF FLOWS BETWEEN ISLANDS

With a view to distributing the flows between islands, broadening and adding value to the current offer, **the communication strategy includes guidelines to appeal to geographical proximity and the complementarity of products and experiences.**

This approach, in addition to creating stimuli for different options of experiences, **it also awakens the desire to get to know the 'Azores whole', fostering a logic of balanced development, in accordance with the specific characteristics of each island.**



IPDT analysis, based on contributions from the trade, stakeholders, local community and international tour operators



## DISTRIBUTION OF FLOWS BETWEEN ISLANDS

Guidelines for distributing flows between islands through **the development of specialist circuits.**

IPDT analysis, based on contributions from the trade, stakeholders, local community and international tour operators



### BIRDWATCHING

São Miguel + Terceira + Graciosa + Pico + Faial + Flores + Corvo



### HIKING / TREKKING

Combined circuit of the 9 islands



### GEOTURISM

Combined circuit through the Azores Geopark - 9 islands



### ARCHAEOLOGICAL DIVING

São Miguel + Terceira + Flores + Faial



### DIVING

Santa Maria + São Miguel + Terceira + Graciosa + Pico + Faial + São Jorge + Flores



### SURF

São Miguel + São Jorge + Terceira + Graciosa





**CANYONING**

São Miguel + São Jorge + Flores



**GASTRONOMY AND WINE**

São Miguel + Terceira + Graciosa + São Jorge + Pico



**CYCLING**

Santa Maria + São Miguel + Terceira + Pico + Faial



**WORLD HERITAGE**

Terceira + Pico



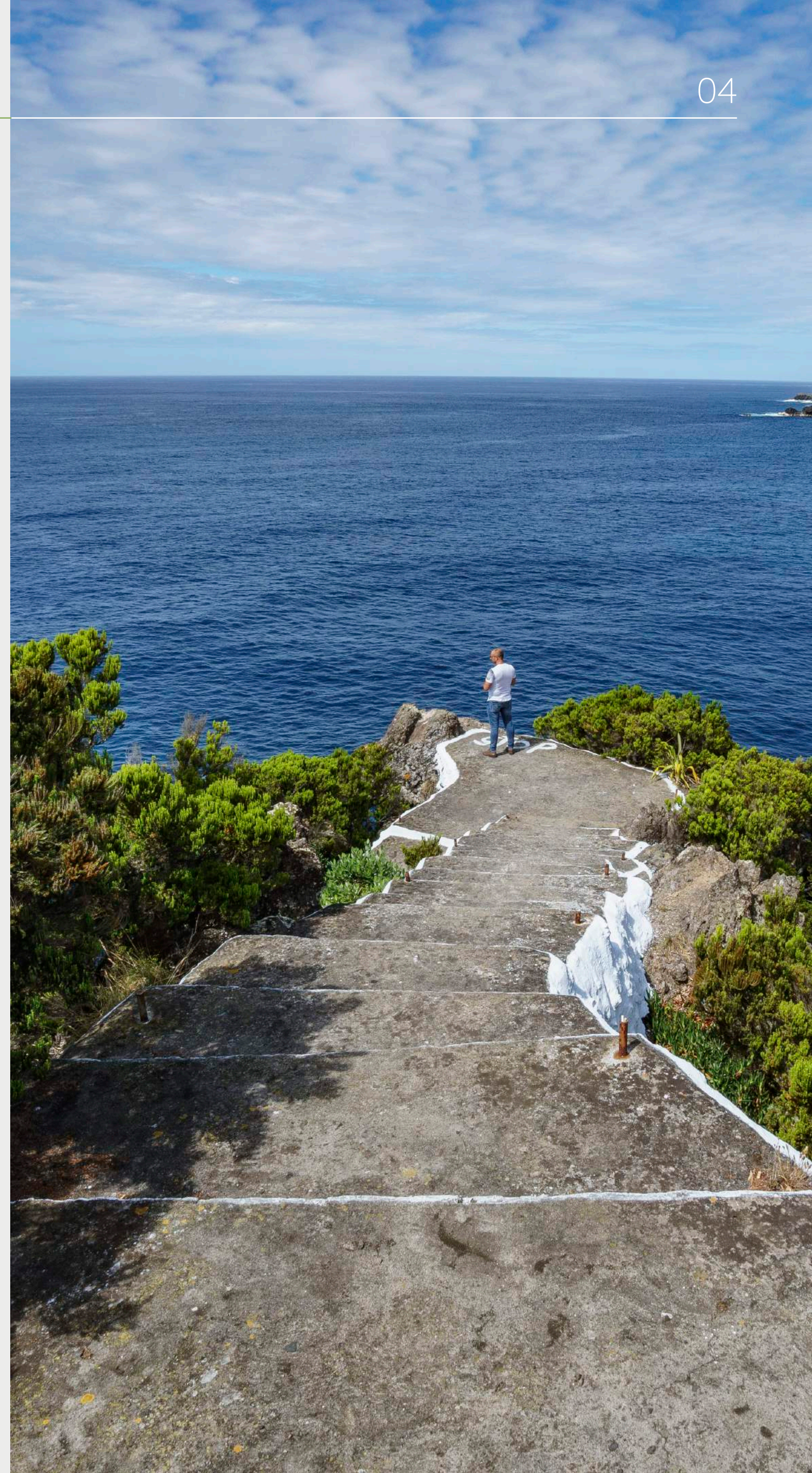
**WHALE WATCHING**

São Miguel + Terceira + Pico + Faial



**BIOSPHERE RESERVES**

São Jorge + Graciosa + Flores + Corvo





# 05

## How we will implement and monitor

To implement the strategy, we have defined:

- 3 areas of action and 28 actions aligned with the Strategic Objectives to be achieved by 2030 and the Sustainable Development Goals established by the United Nations General Assembly.
- A governance model to ensure that the Plan is properly implemented.
- A monitoring model to analyze the evolution of the destination and adapt practices according to a set of 65 indicators. In 2026, we will carry out a Mid-Term Review of the Strategic and Marketing Plan for Azores Tourism - Horizon 2030, to look for any needed adjustments to the strategic proposals, targets to be achieved and actions to be implemented.



## AREAS OF ACTION

To implement the strategy, **3 areas of action and 28 actions** have been defined and aligned with the **strategic objectives defined for 2030** and the **Sustainable Development Goals**.

### A. OFFER QUALIFICATION AND VALORIZATION

To globally qualify the tourist offer, affirming the Azores in the market in a differentiated way and with a positioning of exclusivity.

Place residents at the centre of tourism development.

### B. PROMOTION

Consolidate the positioning and increase the awareness of the Azores and its Brand, using current tools and the use of segmented strategies.

### C. MONITORING

Monitor tourism activity, assess and study trends and innovation processes, to encourage informed decision-making.

### STRATEGIC OBJECTIVES 2030

- 01.** Consolidate the Azores internationally as a sustainable tourist destination, leading by example.
- 02.** Reduce seasonality and distribute tourist flows by managing load capacities.
- 03.** Raising quality standards and generating more value by modernising practices, creating information systems, qualifying the workforce and evolving in the framework for tourism activities.
- 04.** Raising awareness with the end consumer by investing in the digitalization of promotion and the international dissemination of the Azores as a destination.

### SUSTAINABLE DEVELOPMENT GOALS

<p><b>4</b> QUALITY EDUCATION</p>	<p><b>8</b> DECENT WORK AND ECONOMIC GROWTH</p>	<p><b>9</b> INDUSTRY, INNOVATION AND INFRASTRUCTURE</p>	<p><b>10</b> REDUCED INEQUALITIES</p>	<p><b>11</b> SUSTAINABLE CITIES AND COMMUNITIES</p>
<p><b>12</b> RESPONSIBLE CONSUMPTION AND PRODUCTION</p>	<p><b>14</b> LIFE BELOW WATER</p>	<p><b>15</b> LIFE ON LAND</p>	<p><b>16</b> PEACE, JUSTICE AND STRONG INSTITUTIONS</p>	<p><b>17</b> PARTNERSHIPS FOR THE GOALS</p>



## ACTIONS - A. OFFER QUALIFICATION AND VALORIZATION

ACTIONS	CONTRIBUTION TO THE DESTINATION'S OBJECTIVES	ODS	2023	2024	2025	2026	2027	2028	2029	2030
<b>A.1.</b> Continue the process of certification of the Azores as a sustainable tourist destination by EarthCheck	O1 + O2 + O3 + O4		●		●	○	●	●		●
<b>A.2.</b> Qualifying the destination's mobility infrastructures and facilities	O1 + O2 + O3		●	●	●	○	●	●	●	●
<b>A.3.</b> Distributing tourist flows	O1 + O2 + O3 + O4		●	●	●	○	●	●	●	●
<b>A.4.</b> Optimizing mobility solutions in the region	O1 + O2 + O3			●	●	○	●	●	●	●
<b>A.5.</b> Qualifying and planning tourist activities as a guarantee of adopting quality criteria	O1 + O2 + O3		●	●	●	○	●	●	●	●
<b>A.6.</b> Reinforce signage on the 9 islands	O1 + O2 + O3			●	●	○	●	●	●	●
<b>A.7.</b> Boosting the historic centres	O1 + O2 + O3			●	●	○	●	●	●	●

NOTES: To implement the actions, the governance model must be followed, involving responsible bodies, associations, and companies in the sector. In 2026, the actions should also be assessed as part of the Plan's mid-term evaluation.








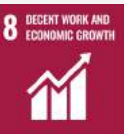





## ACTIONS - A. OFFER QUALIFICATION AND VALORIZATION

ACTIONS	CONTRIBUTION TO THE DESTINATION'S OBJECTIVES	ODS	2023	2024	2025	2026	2027	2028	2029	2030
<b>A.8.</b> Encouraging the attraction, qualification and retention of talent	O1 + O2 + O3 + O4		●	●	●	○	●	●	●	●
<b>A.9.</b> Developing accessibility for all at the destination	O1 + O2 + O3 + O4		●	●	●	○	●	●	●	●
<b>A.10.</b> Professionalizing the Meeting Industry	O1 + O2 + O3 + O4			●	●	○	●	●	●	●
<b>A.11.</b> Empowering small and medium-sized tourism businesses for digitalization	O1 + O2 + O3 + O4			●	●	○	●	●	●	●
<b>A.12.</b> Produce destination fact sheets and safety information	O1 + O2 + O3 + O4		●			○				
<b>A.13.</b> Create a development plan for the destination's strategic products	O1 + O2 + O3 + O4			●		○				
<b>A.14.</b> Promote the decarbonization of the Azorean tourism sector	O1 + O2 + O3 + O4		●	●	●	○	●	●	●	●

NOTES: To implement the actions, the governance model must be followed, involving the responsible bodies, associations, and companies in the sector. In 2026, the actions should also be assessed as part of the Plan's mid-term evaluation.
















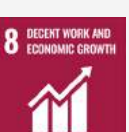














## ACTIONS - B. PROMOTION

ACTIONS	CONTRIBUTION TO THE DESTINATION'S OBJECTIVES	ODS	2023	2024	2025	2026	2027	2028	2029	2030
<b>B.1.</b> Encourage the digital transition of the destination's communication	O1 + O3 + O4	  	●	●	●	○	●	●	●	●
<b>B.2.</b> Define a model that guarantees coordination between promotion on traditional and digital channels	O1 + O3 + O4	  	●	●	●	○	●	●	●	●
<b>B.3.</b> Develop, promote and qualify events	O1 + O2 + O4	   	●	●	●	○	●	●	●	●
<b>B.4.</b> Develop awareness-raising activities for visitors on sustainability	O1 + O2 + O4	  	●	●	●	○	●	●	●	●
<b>B.5.</b> Develop sustainability awareness-raising campaigns aimed at residents	O1 + O4	  	●	●	●	○	●	●	●	●
<b>B.6.</b> Develop campaigns aimed at the diaspora (USA; CAN; BR)	O1 + O4		●	●	●	○	●	●	●	●

NOTES: To implement the actions, the governance model must be followed, involving the responsible bodies, associations, and companies in the sector. In 2026, the actions should also be assessed as part of the Plan's mid-term evaluation.



## ACTIONS - C. MONITORING

ACTIONS	CONTRIBUTION TO THE DESTINATION'S OBJECTIVES	ODS	2023	2024	2025	2026	2027	2028	2029	2030
<b>C.1</b> Evaluate visitors' digital behaviour using business intelligence platforms	O1 + O2 + O3 + O4	 		●	●	○	●	●	●	●
<b>C.2</b> Monitor visitor profile and level of satisfaction	O1 + O3 + O4	  	●	●	●	○	●	●	●	●
<b>C.3</b> Monitor residents' satisfaction with tourism	O1	   	●	●	●	○	●	●	●	●
<b>C.4</b> Monitor the satisfaction of economic agents	O1 + O2 + O3	   	●	●	●	○	●	●	●	●
<b>C.5</b> Monitor the performance and dynamics of tourism at the destination	O1 + O2 + O3 + O4	   	●	●	●	○	●	●	●	●
<b>C.6</b> Monitor the level and evolution of the destination's awareness	O1 + O4	   	●	●	●	○	●	●	●	●
<b>C.7</b> Monitor tourist flows, and average spending by market and segment	O1 + O2 + O3	   	●	●	●	○	●	●	●	●
<b>C.8</b> Implement a Destination Management System	O1 + O3	   	●	●	●	○	●	●	●	●

NOTES: To implement the actions, the governance model must be followed, involving the responsible bodies, associations, and companies in the sector. In 2026, the actions should also be assessed as part of the Plan's mid-term evaluation.



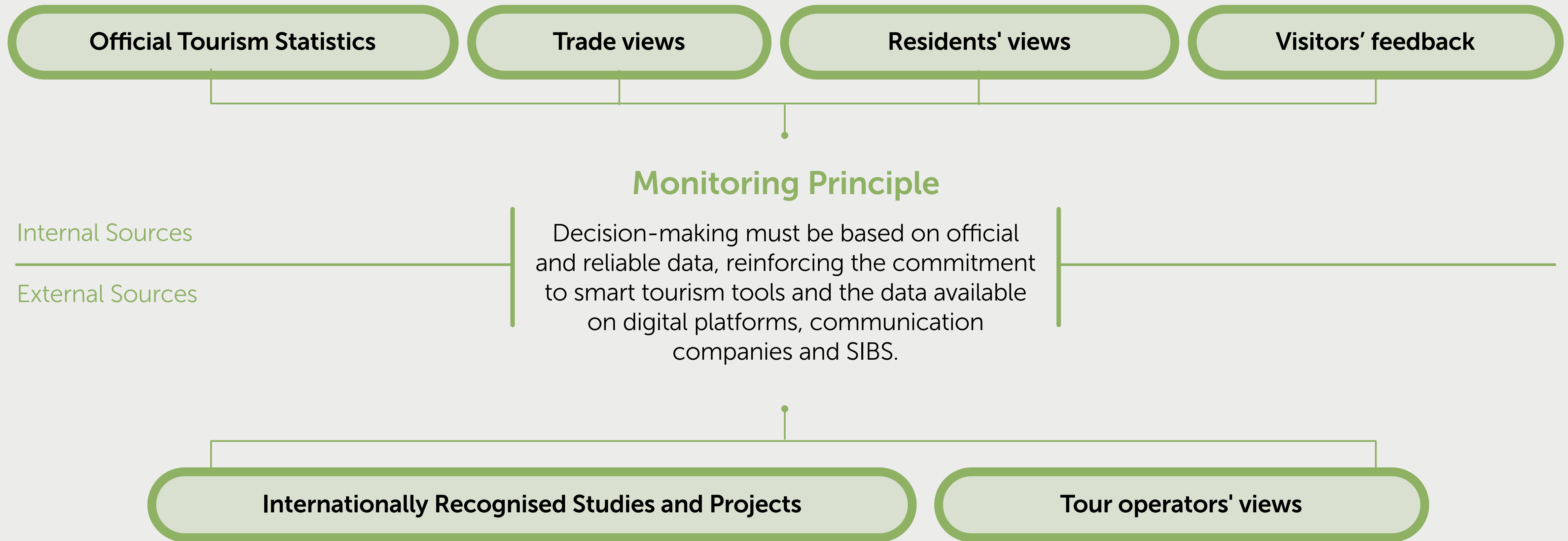
# GOVERNANCE MODEL



\* Use the DMO's operating model and structure through the Azores Destination Sustainability Monitoring Advisory Committee and the Azores Destination Sustainability Monitoring Group.



# MONITORING PRINCIPLE



Internal Sources

External Sources





GOVERNO  
DOS AÇORES

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TOURISM