INSIGHTS INTO ALGARVE’S SURVEY TO RESIDENTS, ITS METHODOLOGY, MAIN FINDINGS AND WAY FORWARD

MONITUR Project

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INSTO Insights Webinar on Measurement of Local Satisfaction at the Destination Level
December 7th, 2022
The Algarve is the southern region of Portugal where the tertiary sector is considered the main employment generator, specially tourism.
# The Algarve - Portugal

## Key Indicators

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2022*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rooms</strong></td>
<td>52.7 K</td>
<td>52.4 K</td>
</tr>
<tr>
<td><strong>Beds</strong></td>
<td>134 K</td>
<td>132 K</td>
</tr>
<tr>
<td><strong>Guests</strong></td>
<td>5.1 MM</td>
<td>3.9 MM</td>
</tr>
<tr>
<td><strong>Overnight stays</strong></td>
<td>20.9 MM</td>
<td>15.9 MM</td>
</tr>
</tbody>
</table>

*Source: TravelBI

* Until September 2022
Figure 1: Evolution of the number of monthly overnight stays since 2018

Source: Travel BI
THE OBSERVATORY

History of our Observatory

- 2019: The Observatory was created
  
  Partners:
  
  - Algarve Tourism Board (RTA)
  - University of Algarve (UAlg)
  - Algarve Regional Coordination and Development Commission (CCDR – Algarve)
  - Tourism of Portugal (TdP)

- 2020: The Observatory became member of the INSTO

- 2021: The Observatory's bodies were established

- 2022: The Observatory started sharing knowledge to regional stakeholders
Mission

The mission of the Algarve Sustainable Tourism Observatory is two-fold:

1) to describe and monitor tourism indicators as well as to detect and anticipate trends through statistical forecasting tools;

2) to provide all the stakeholders involved in tourism activity in the region with specific knowledge and support for the definition of tourism development and competitiveness strategies, ensuring the preservation and enhancement of identity, heritage and local values.
THE OBSERVATORY

Objectives

To build an evaluation model to measure and monitor the development of sustainable tourism in the Algarve.

Specific objectives:

▪ To identify the main dimensions to assess the development of the Algarve in a holistic, comprehensive and sustainable perspective;

▪ To quantify all indicators for the 16 municipalities of the Algarve;

▪ To design and implement an online decision support system (DSS) for sharing knowledge with stakeholders.
METHODS
### THE MODEL ARCHITECTURE

#### DIMENSIONS AND AREAS

<table>
<thead>
<tr>
<th>Economic Dimension</th>
<th>Sociocultural Dimension</th>
<th>Environmental Dimension</th>
<th>Destination Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic benefits of destination</td>
<td>Social impacts/Local satisfaction with tourism</td>
<td>Energy management</td>
<td>Sustainable tourism management in tourism enterprises</td>
</tr>
<tr>
<td>Employment</td>
<td>Cultural Impacts</td>
<td>Water management</td>
<td>Tourist satisfaction</td>
</tr>
<tr>
<td>Seasonality</td>
<td>Gender Equality</td>
<td>Wastewater management</td>
<td></td>
</tr>
<tr>
<td>Accessibility and inclusion</td>
<td>Health and Safety</td>
<td>Solid waste management</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CO2 emissions</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mobility</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Air quality and noise</td>
<td></td>
</tr>
</tbody>
</table>

Source: Own elaboration

- **Tourist Questionnaire**
- **Resident Questionnaire**
- **Company Interviews & Questionnaire**
- **Secondary data**
THE MODEL - INDICATORS

Economic Dimension

- Economic Benefits of Destination
  - Number of night stays in tourist accommodation establishments, per month
  - Average stay of tourists
  - Average daily expenditure per tourist
  - Market share of the main source markets

Destination Management

- Tourist satisfaction
  - Percentage of tourists that are satisfied with their overall experience in the destination
  - Indicators intended to measure tourists’ experience such as memories of the experience, global perceived quality of the experience
  - Percentage of repeat/return visitors (within 5 years)

Secondary data

Primary data
THE MODEL - INDICATORS

Sociocultural dimension

Local satisfaction with tourism

- The Observatory uses a mixed methodology: primary data collected through surveys and semi-structured interviews & secondary data.

- The surveys to residents and tourists were built based on an extensive literature review, being a continuation of projects previously carried out by the University of Algarve: RESTUR and TurExperience.

<table>
<thead>
<tr>
<th>To which extent would you agree/disagree with the following statements</th>
<th>1 - Strongly disagree</th>
<th>2 - Disagree</th>
<th>3 - Neither agree nor disagree</th>
<th>4 - Agree</th>
<th>5 - Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personally, I benefit from the development of tourism in my municipality</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am satisfied with the current level of tourism development in my municipality</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am satisfied with the way tourism is being managed in my municipality</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall, I am satisfied with tourism in my municipality</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SURVEY TO RESIDENTS – METHODS
SURVEY TO RESIDENTS - METHODOLOGY

- In the Survey to Residents, the Observatory aims to observe around 3,000 questionnaires.

- The data were/will be collected in the 16 municipalities of Algarve, in the years of 2022 and 2023, both in high and low seasons.

Survey to residents

- **Target population:** All adult residents in the Algarve region for at least 1 year.

- **Sampling method:** Proportional Stratified Sampling by:
  - Municipality (16)
  - gender (2)
  - age group (3)

- **Mode of data collection:** Personal interview using the paper-and-pencil mode, following a random route method with a systematic selection of residents.
## Table 1. Sample Calculation for High Season (based on 438,864 residentes in the Algarve in 2018 [INE, 2019])

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>%</th>
<th>MF</th>
<th>18 - 24 years</th>
<th>25 - 64 years</th>
<th>65 years or more</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>M</td>
<td>F</td>
<td>MF</td>
</tr>
<tr>
<td>Albufeira</td>
<td>91</td>
<td>9.1%</td>
<td>8</td>
<td>4</td>
<td>4</td>
<td>63</td>
</tr>
<tr>
<td>Alcoutim</td>
<td>6</td>
<td>0.6%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Aljezur</td>
<td>13</td>
<td>1.3%</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>Castro Marim</td>
<td>15</td>
<td>1.5%</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Faro</td>
<td>139</td>
<td>13.9%</td>
<td>11</td>
<td>6</td>
<td>5</td>
<td>91</td>
</tr>
<tr>
<td>Lagoa</td>
<td>51</td>
<td>5.1%</td>
<td>5</td>
<td>2</td>
<td>2</td>
<td>34</td>
</tr>
<tr>
<td>Lagos</td>
<td>69</td>
<td>6.9%</td>
<td>7</td>
<td>3</td>
<td>3</td>
<td>45</td>
</tr>
<tr>
<td>Loulé</td>
<td>157</td>
<td>15.7%</td>
<td>14</td>
<td>7</td>
<td>7</td>
<td>103</td>
</tr>
<tr>
<td>Monchique</td>
<td>13</td>
<td>1.3%</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>Olhão</td>
<td>102</td>
<td>10.2%</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>68</td>
</tr>
<tr>
<td>Portimão</td>
<td>125</td>
<td>12.5%</td>
<td>11</td>
<td>6</td>
<td>6</td>
<td>83</td>
</tr>
<tr>
<td>São Brás de Alportel</td>
<td>24</td>
<td>2.4%</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td>Silves</td>
<td>83</td>
<td>8.3%</td>
<td>7</td>
<td>3</td>
<td>3</td>
<td>53</td>
</tr>
<tr>
<td>Tavira</td>
<td>58</td>
<td>5.8%</td>
<td>5</td>
<td>2</td>
<td>2</td>
<td>35</td>
</tr>
<tr>
<td>Vila do Bispo</td>
<td>12</td>
<td>1.2%</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>Vila Real de Santo António</td>
<td>43</td>
<td>4.3%</td>
<td>4</td>
<td>2</td>
<td>2</td>
<td>28</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1000</td>
<td>100.0%</td>
<td>88</td>
<td>45</td>
<td>43</td>
<td>651</td>
</tr>
</tbody>
</table>

Source: Own elaboration.
Figure 2. Percentage of Respondents by Municipality, During the High Season of Tourist Activity in the Algarve

n = 990 valid questionnaires

Source: Own elaboration.
SURVEY TO RESIDENTS - METHODOLOGY

- Survey to residents
  - **Interviewers**: 5 interviewers trained by the research team and supervised by a post-doc researcher.
  - **Questionnaire**: 23 questions divided into 4 sections, plus 7 socio-demographic questions:
    - Perception about tourism impacts
    - Involvement and dependence on the tourism sector
    - Support for tourism development, Satisfaction with tourism activity, Pro-Tourism Behaviour and Individual Happiness
    - Relationship with the municipality
    - The questionnaire included 5-point Likert scales, item-category scales and quantitative scales.
  - **Period of data collection**: July – September 2022.
  - **Data analysis**: was/will be made using the IBM SPSS Statistics software, through descriptive and inferential statistics.
SURVEY TO RESIDENTS - RESULTS

- Involvement and dependence on the tourism sector

Figure 3. Tourism-related occupation in household

- No: 45.3%, Yes: 54.7%

Figure 4. Tourism-related occupation of respondent

- No: 41.3%, Yes: 58.7%

Figure 5. Household income from Tourism

- No: 18.5%, Yes: 81.5%

Source: Own elaboration
SURVEY TO RESIDENTS - RESULTS

- Support, Satisfaction and Pro-Tourism Behaviour

Figure 6. Support to Tourism Activity
Global Average: 3.94

- I believe that, in general, the impacts of tourism in my municipality are positive
- I think my municipality should continue to be a tourist destination

3.82 4.06

Figure 7. Satisfaction with Tourism Activity
Global Average: 3.11

- I am satisfied with the way tourism is being managed in my municipality
- Personally, I benefit from the development of tourism in my municipality
- I am satisfied with the current level of tourism development in my municipality
- Overall, I am satisfied with tourism in my municipality

3.02 3.12 3.23 3.35

Figure 8. Pro-Tourism Behaviour
Global Average: 3.44

- I am willing to pay more taxes to contribute to the development of tourism
- I am willing to accept some sacrifices in order to receive the benefits of tourism
- I am willing to protect natural and environmental assets
- I am willing to receive tourists with friendliness and hospitality

2.12 3.44 4.00 4.21

Scale: 1 – Strongly Disagree; 5 – Strongly Agree

Source: Own elaboration
SURVEY TO RESIDENTS - RESULTS

- Support, Satisfaction, Pro-Tourism Behaviour

Figure 9. Comparison of Support, Satisfaction and Pro-Tourism Behaviour – 2021 vs 2022

Scale: 1 – Strongly Disagree; 5 – Strongly Agree
Source: Own elaboration
**NEXT STEPS**

Present

- **Survey & Data processing**

Future

- **Preparation of reports and presentations with results**
- **Conduct surveys to companies in low season 2023**
- **Conduct surveys to tourists in 2023 – High & Low seasons**
- **Sharing knowledge with stakeholders**
- **Conduct surveys to residents in 2023 – High & Low seasons**

- **DSS development**

- **Decision Support System development and pre-test**
MONITUR project

COORDINATION
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