ESTRATÉGIA
TURISMO
2027
PORTUGAL’S TOURISM AN OVERVIEW
PORTUGAL’S TOURISM: AN OVERVIEW

Portugal’s position in the European Union (EU 28)

9th tourism receipts

Portugal’s ranking in the Travel & Tourism competitiveness Index of the World Economic Forum

14th Travel & Tourism Competitiveness Index

Source: Eurostat (2017); Eurostat (2017); Fórum Económico Mundial (2017)
21.1 million guests
≈ 57.5 million overnight stays
Circa of 16.6 billion euros in tourism receipts

Source: INE, 2018
Tourism is the major export industry of Portugal

- 18% of total exports of goods and services
- 50,1% of total exports of service industry

Source: INE, 2017
Very important economic and social activity:

- Exports
- GDP (13.7% of Portuguese GDP comes from tourism*)
- Employment – creation of jobs (6.8% of total employed population)
- Regional development

Source: INE, 2017

*Tourism Satellite Account, 2018
LEADING the tourism of the future
OPEN, SHARED AND PARTICIPATED PROCESS
Listen, engage and plan with...
OPEN, SHARED AND PARTICIPATED PROCESS

INTERNATIONAL FOCUS GROUP

5 Strategic Markets

7 Focus Group

11 Meetings

80 Participants

- Tour Operators
- Travel Agents
- Associations
- Press
OPEN, SHARED AND PARTICIPATED PROCESS

**Strategic Tourism Labs**

- **7** Territorial Labs
- **3** Thematic Labs
- **10** Public Sessions
- **more than 1400** Participants

- Universities
- Enterprises
- Regional Tourism Entities
- Public Organizations
- Tourism and Hotels Associations
OPEN, SHARED AND PARTICIPATED PROCESS

Website ET27

QUAIS OS DESAFIOS NOS PRÓXIMOS 10 ANOS?
ET 27 QUESTIONÁRIO - PARTICIPE!
10 CHALLENGES FOR A 10 YEARS STRATEGY
1. PEOPLE

Promote employment, qualifications, and valuing people; promote the rise of income for the professionals of tourism
2. COHESION

Extend touristic activity to all our territory and promote tourism as a factor for social cohesion.
3.

GROWTH IN VALUE

Accelerate pace in revenue versus overnight stays
4. TOURISM ALL YEAR AROUND

Extend tourism activities throughout the year, assuring sustainability of tourism.
5. ACCESSIBILITIES

Reinforce accessibility to Portugal and promoting mobility within the territory
6. DEMAND
Achieve the better markets to increase tourism receipts and extending tourist activity throughout the year and the country
7. INOVATION

Stimulate innovation and entrepreneurship
8. SUSTAINABILITY

Ensure the preservation of the natural and cultural resources
9.

SIMPLIFICATION

Simplify legislation and make public administration more agile
10. **INVESTMENT**

Guarantee financial resources and boost investment
10 ASSETS FOR A 10 YEARS STRATEGY
STRATEGIC PRIORITIES
1. VALUE THE TERRITORY AND THE COMMUNITIES
2. BOOST THE ECONOMY
3. ENHANCE KNOWLEDGE
4. GENERATE NETWORKS AND CONNECTIVITY
5. PROMOTE PORTUGAL

FOCUS ON PEOPLE

TOURISTS | PROFESSIONALS | LOCALS
<table>
<thead>
<tr>
<th>1</th>
<th>ENRICH THE TERRITORY AND THE COMMUNITIES</th>
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<td>2</td>
<td>BOOST THE ECONOMY</td>
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<tr>
<td>3</td>
<td>ENHANCE KNOWLEDGE</td>
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<td>4</td>
<td>GENERATE NETWORKS AND CONNECTIVITY</td>
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<tr>
<td>5</td>
<td>PROMOTE PORTUGAL</td>
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Preserve, value and use to the **historical and cultural heritage**

Preserve and valorize the **authenticity** of Portugal and the local communities way of life

State tourism in the **Blue Economy**

Maximize **rural and natural heritage** and encourage sustainable tourism in protected areas

Promote the **urban regeneration** of the cities and regions and a sustainable tourism development in the territories/destinations

Structure and promote offer in response to the demand
Ensure the **competitiveness** of the tourism industry on short, medium and long term perspective

**Reduce** contextual costs and **bureaucracy**

Attract investment and qualify the tourist offer

Stimulate the **circular economy** in the tourism activity

State Portugal as an **international hub in entrepreneurship and innovation** and in the production of goods and services for the tourism industry
1. Value the Territory and the Communities
   Reinforce tourism jobs prestige, create critical mass adapted to market needs and promote gender equality and equal opportunities
   Ensure the transfer of knowledge from Universities and research centers to the tourism industry
   Disseminate knowledge and statistical information
   Support entrepreneurs and managers to lead the tourism of the future - technological, inclusive and sustainable
   Assert Portugal as a smart destination

2. Boost the Economy

3. Enhance Knowledge

4. Generate Networks and Connectivity

5. Promote Portugal
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<th>VALUE THE TERRITORY AND THE COMMUNITIES</th>
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<td>Promote and <strong>reinforce air connections</strong> throughout the year and attract homeport and turnaround cruise ship operations</td>
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<td>Improve the <strong>transportation networks and mobility</strong> (road, railway and fluvial navigation)</td>
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<th>ENHANCE KNOWLEDGE</th>
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<td>Promote the &quot;<strong>tourism for all</strong>&quot;, in an inclusive perspective, that welcome the different markets/tourist segments</td>
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<td><strong>Actively involve society</strong> in the process of tourism development of the country and the regions</td>
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<td>Promote networking and <strong>cooperation among different sectors/clusters</strong> of the portuguese economy</td>
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Reinforce Portugal’s internationalization as a tourism destination to visit, invest, live and study

Place domestic tourism as a factor of competitiveness and leverage of the national economy

Involve the Portuguese descent community as a strategic asset for the promotion of Portugal and to attract investment

Project Portugal as a destination for international congresses and cultural and sports events with international range

Affirm Portugal in world tourism organizations and in international cooperation
Economic Sustainability

Overnight stays

- 2015: 49 millions
- 2017: 57 millions
- 2020: 59 millions
- 2027: 80 millions

Receipts

- 2015: 11.5 billions
- 2017: 15.2 billions
- 2020: 15.9 billions
- 2027: 25.8 billions

2018:
- Overnight stays: 57.5 millions
- Receipts: 16.6 billions
Social Sustainability

Qualifications

2018
Number of secondary and post-secondary degrees in tourism: 32%

Higher education
- 12%
- 28%

Secondary and post-secondary education
- 30%
- 60%

Basic education level
- 58%
- 12%

[2015] [2027]

Tourism all year around

2018
Seasonality index: 36.0%

[2015] [2016] [2017] [2017]
Environmental Sustainability

Energy

- 2017: 62% of tourism companies adopt measures for using energy efficiently

Water

- 2017: 62% of tourism companies promote efficient usage of water in their operations

Waste

- 2017: 63% of companies develop efficient waste management actions