



ESTRATÉGIA TURISMO 2027

A cyclist wearing a helmet and a backpack stands on a large, rounded rock on a hillside. The cyclist is holding a mountain bike. The background features a vast landscape of rolling hills covered in dense green forest, with a coastline visible in the distance under a dramatic sky with scattered clouds and a bright sun setting or rising. The scene is framed by a white dashed border with arrows pointing outwards from the corners.

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*



World's Leading
Destination



visit Portugal

PORTUGAL'S TOURISM : AN OVERVIEW

21,1 million guests

≈ 57,5 million overnight stays

Circa of **16,6 billion euros in tourism receipts**

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

PORTUGAL'S TOURISM : AN OVERVIEW

➤ 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



ESTRATÉGIA
TURISMO
2027

LEADING the tourism of the future

A person is silhouetted against a bright sunset, standing on a large rock with a bicycle. The background shows a vast landscape of green hills and a cloudy sky. A large white text overlay is centered in the image, enclosed in a dashed white rectangular border. To the left of the text, there is a vertical double-headed arrow and a curved dashed arrow pointing from the top left towards the text.

OPEN, SHARED AND PARTICIPATED PROCESS

ESTRATÉGIA TURISMO 2027



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

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OPEN, SHARED AND PARTICIPATED PROCESS

WEBSITE ET27



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2027

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QUAIS OS DESAFIOS NOS PRÓXIMOS 10 ANOS?
ET 27 QUESTIONÁRIO - PARTICIPE!

estrategia.turismodeportugal.pt



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

UNIQUE TRANSVERSAL ASSET

PEOPLE

DIFERENTIATING ASSETS

Climate and light
History and culture
Sea
Nature
Water

QUALIFYING ASSETS

Gastronomy and Wines
Events

EMERGING ASSETS

Well-Being
Living in Portugal

A photograph of three hikers from behind, walking on a dirt trail. The hiker on the left wears a green cap and a blue backpack. The middle hiker wears a red cap and a green backpack. The hiker on the right wears a white cap and a black backpack. They are surrounded by lush green vegetation and a clear blue sky. A white dashed line forms a rectangular frame around the hikers, with arrows pointing outwards from the corners. The text 'STRATEGIC PRIORITIES' is centered within this frame.

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

1

ENRICH THE
TERRITORY
AND THE
COMMUNITIES

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BOOST THE
ECONOMY

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ENHANCE
KNOWLEDGE

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CONNECTIVITY

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PROMOTE
PORTUGAL

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

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CONNECTIVITY

5
PROMOTE
PORTUGAL

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

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CONNECTIVITY

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PROMOTE
PORTUGAL

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**

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AND THE
COMMUNITIES

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4
GENERATE
NETWORKS AND
CONNECTIVITY

5
PROMOTE
PORTUGAL

Promote and **reinforce air connections** throughout the year and attract homeport and turnaround cruise ship operations

Improve the **transportation networks and mobility** (road, railway and fluvial navigation)

Promote the “**tourism for all**”, in an inclusive perspective, that welcome the different markets/tourist segments

Actively involve society in the process of tourism development of the country and the regions

Promote networking and **cooperation among different sectors/clusters** of the portuguese economy

1

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PROMOTE
PORTUGAL

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**

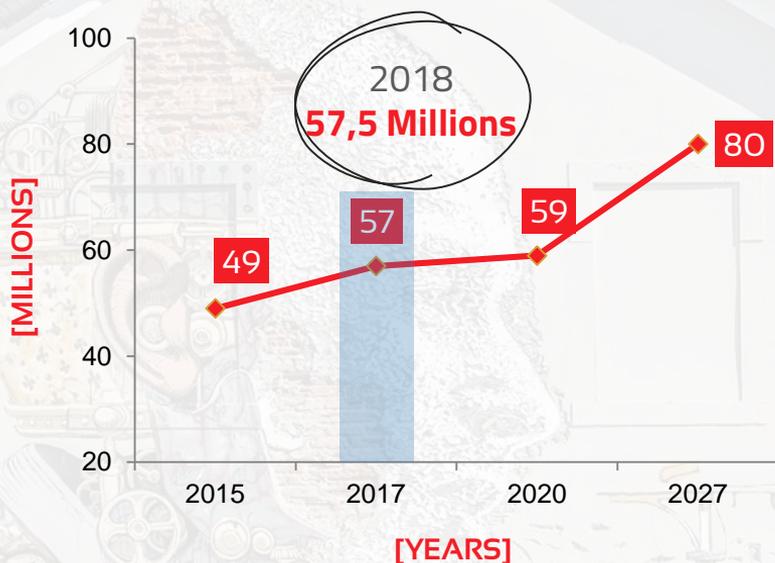
Affirm Portugal in world tourism organizations and in **international cooperation**



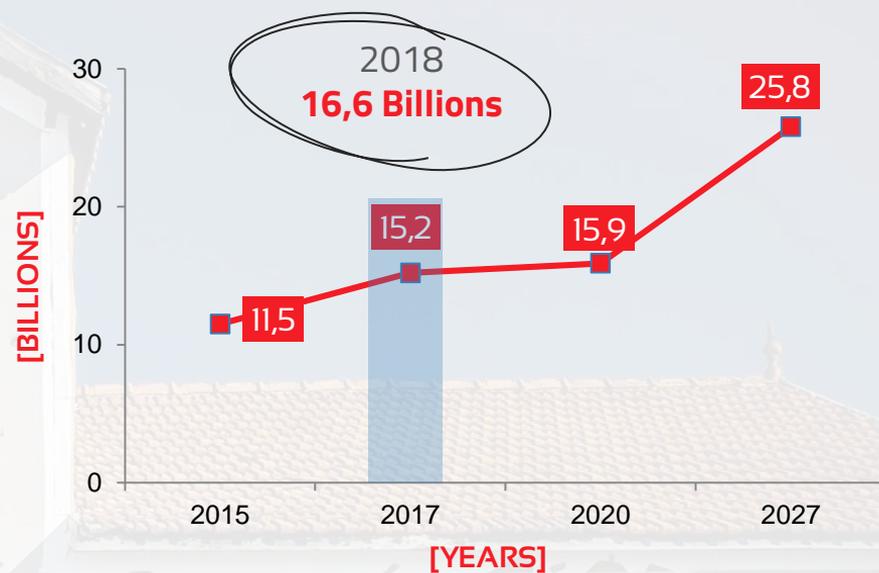
GOALS

Economic Sustainability

Overnight stays



Receipts



Social Sustainability

Qualifications

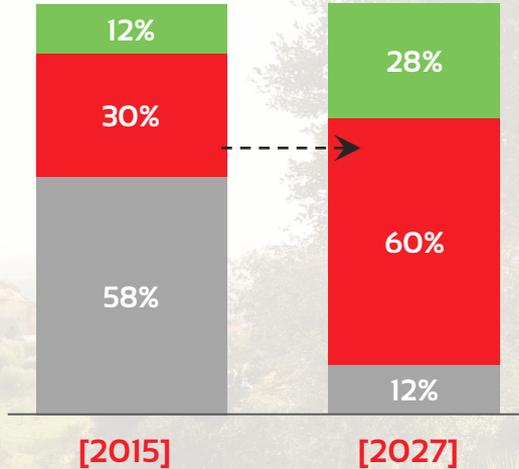
2018

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

Higher education

Secondary and post-secondary

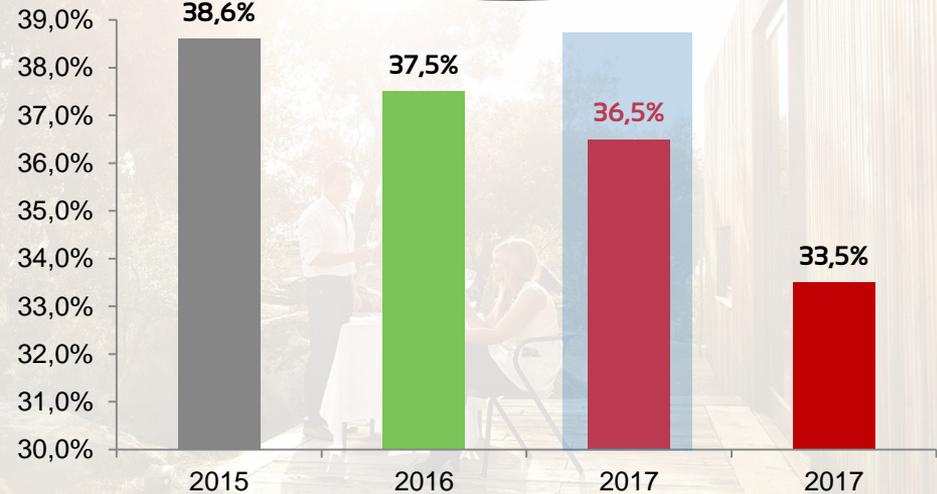
Basic education level



Tourism all year around

2018

Seasonality index: 36,0%

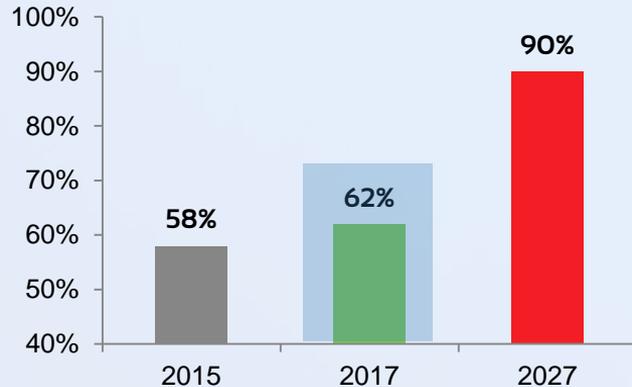


Environmental Sustainability

Energy

2017

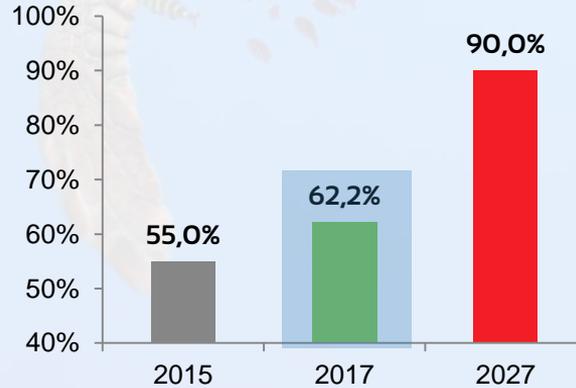
**62% of tourism companies
adopt measures for using
energy efficiently**



Water

2017

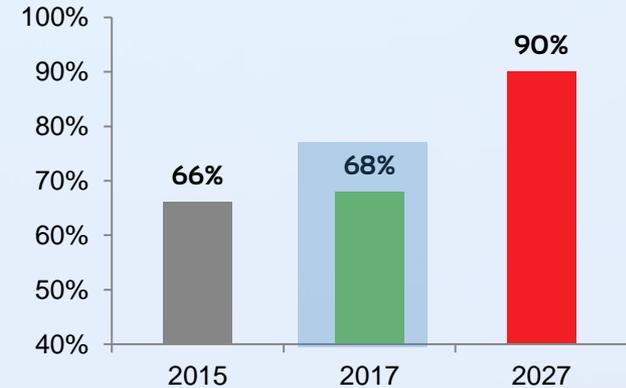
**62% of tourism companies
promote efficient usage of
water in their operations**



Waste

2017

**63% of companies develop
efficient waste management
actions**





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