

ESTRATÉGIA
TURISMO
2027

TOURISM STRATEGY **2027**

Leading the Tourism of the Future

TOURISM STRATEGY 2027

LEADING THE TOURISM OF THE FUTURE



Manuel Caldeira Cabral
Economics Minister

Tourism is an economic activity of strategic importance to the country's economic and social development, namely with regard to employment and exports growth.

The results obtained in 2016 confirm that tourism is the country's largest export activity, resulting from joint action and strong investment on the part of the private and public sectors. The goal of Tourism Strategy 2027 – the strategic guideline for tourism in Portugal for the period 2017-2027 – is to follow up on this collective work undertaken by everyone, while also meeting one of the goals of the Government Program: “Invest in the collective planning of tourism via a Strategic National Plan for Tourism.”

The ability to see beyond the present requires setting a course, having vision and establishing priorities, while also incorporating them into the next European Support Framework 2021-2027. Leading the tourism of the future is more than an ambition, it is a conviction to mobilize a whole country committed to sustainability, territorial and social cohesion, innovation, entrepreneurship and technology and valuing people.

Leading the tourism of the future therefore involves affirming Portugal's place as a sustainable destination with a cohesive territory, innovative and competitive, a country that values work and talent. A destination for visiting, investing in, living in and studying in. An inclusive, open and technological country that has positioned itself as a specialized hub for tourism.

Such an aspiration can only be possible with the cooperation and involvement of society and all of its public and private participants. It is therefore important that in addition to knowing where we want to be 10 years from now – leading the tourism of the future – we must define concrete measures to that end.

As such, Tourism Strategy 2027 has set economic targets for overnight stays and tourism revenue with a clear focus on territorial cohesion and increased value. We would like TS27 to increase the demand for tourism in the country and in the various regions and we would like it to guide this growth that is based more on growth in revenue than on growth in overnight stays, thereby offering greater benefits to the tourism stakeholders and to the local populations, creating a tourism multiplier effect and acting as the engine for local economic-social development.

The policies we have launched during this first year of government have already benefitted from this discussion and have helped contribute to the goals identified by the thousands of partners who have participated in this project.

Policies that value training and people who work in tourism and which focus on strong investment initiated in the Hotel and Tourism Schools, along with qualification and training policies, and diversification of supply with implementation of projects, such as *All For All* and *Portuguese Trails*, asserting our country as an inclusive destination that is sustainable and includes hiking trails, but also initiatives such as REVIVE, which plans to improve 30 empty public buildings, turning them into an economic asset that generates employment and wealth; policies that promote the sustainability of the tourism activity over the course of the year, to which the program for promoting flight connections and tourism operations with the creation of 64 new flight operations in 2016; policies that assert tourism as being a sector of innovation and the future, namely Tourism 4.0 and the entrepreneurial program at the hotel and tourism schools, namely *Tourism Creative Factory*; policies that allow new demand and attractiveness to be generated over the course of the year, such as the program for attracting international congresses and 365 Algarve, an ambitious initiative that brings to the country some 1,022 cultural events outside of the high season.

May the next 10 years be successful for tourism and for the Portuguese economy.

TOURISM STRATEGY 2027

TOURISM NEEDS EVERYONE AND EVERYONE NEEDS TOURISM



Ana Mendes Godinho
Secretary of State for Tourism

In 2016, tourism reached record numbers in Portugal, especially with respect to:

- expansion of tourism activity to the less traditional months, with two-thirds of the growth having occurred during the low season;
- increased employment in tourism;
- growth in all the regions, higher growth rate in tourism and hotel revenue than the growth in the number of guests;
- diversification in issuer markets with expressive growth in the U.S., Polish and Brazilian markets;
- increased vigour in the internal market;
- international recognition with a significant increase in international awards.

These results illustrate the capacity of tourism to generate more revenue, more employment and broaden the activity to extend throughout the entire year and territory.

2016 showed that focused, collaborative team work with clear objectives helped reach results that illustrate how tourism has the capacity to be a sustainable activity throughout the whole year, capable of adding value. This requires defining targets and developing the necessary underlying actions.

This is why we need to develop a long term strategy in the form of Tourism Strategy 2027.

In May 2106 we initiated this strategy. It was a path of dialogue, listening, discussion, plural and open, leading to the assessment of our strengths and weaknesses and to the acceptance of the commitments that are reflected herein.

This strategy was designed together with everyone and we want it to be dynamic, alive and cross-sectional, attentive to the market and its trends. A strategy in which everyone has a role to play.

Planning is done in the field and this premise is part of the DNA of this document. We went on the road with the aim of really listening to people, companies, regions, tourists and citizens because all of them are stakeholders in the tourism value chain.

The public discourse process included more than 1,700 participants and involved (i) discussion at strategic tourism laboratories in all of the country's regions; (ii) listening to international operators by holding focus groups in the markets and (iii) holding online public consultation. For the first time, we listened to the countries where the demand comes from, namely 5 strategic markets from where most of the existing foreign demand comes from: Spain, Germany, France, United Kingdom and Brazil.

How do they see Portugal today? What do they prefer?

What are you looking for that Portugal cannot offer?

What are the things you know about and the things you do not know about?

What are the best promotion methods?

How can demand be spread out throughout the year and across the whole territory?

A strategy is always a product of choices and priorities. This is no different: we make choices and establish priorities as part of a broad public discussion.

That is why this is a document that results from everyone's contribution.

This strategy will help us make Portugal a more cohesive country, distinguishable by its non-relocatable resources, a country where we all like to live and be valued.

We should never forget that as Secretary-General of the World Tourism Organization Taleb Rifai said, "The best of Portugal are the Portuguese."



Luís Araújo

President of Turismo de Portugal, I.P.

The vision of Tourism Strategy 2027 reflects our goal: “establish tourism as a hub for economic, social and environmental development throughout the territory, making Portugal one of the most competitive and sustainable tourism destinations in the world.”

Planning on a 10 year basis requires a degree of flexibility, in order to ensure that a strategic document does not become obsolete, ineffective and incapable of serving the purpose for which it was created. This is why Tourism Strategy 2027 will be implemented via various types of plans, programs and projects, thus combining a long term vision with short term action.

This guideline is based on five strategic pillars, each containing a set of lines of action that will then be implemented through concrete actions geared toward the short/medium term – horizon 2020 – containing types of priority projects.

Tourism Strategy 2027 thus has established priorities based on the five strategic pillars:

- _ add value to the territory, using historical-cultural assets and preserving their authenticity; urban regeneration; economic protection of natural and rural heritage, affirming the importance of tourism with regard to the economy of the sea, and the structuring of tourism offerings to better suit demand;
- _ drive the economy, with regard to competitiveness of businesses; simplification, eliminating bureaucracies and reducing contextual costs; attracting investment; improving tourism offerings; the circular economy; entrepreneurship and innovation;
- _ leverage knowledge, which includes improvement of the tourism professions; training human resources; ongoing qualification of entrepreneurs as managers, spreading of knowledge and information; establishing Portugal as a smart destination;
- _ generate networks and connectivity by more air travel routes throughout the year and increasing territorial mobility; promoting “tourism for all” from an inclusive point of view; involving society in the process of developing tourism and co-creation; networking and joint promotion among the various sectors.

_ raising Portugal's profile, making it more well known internationally as a destination for visiting, investing, living and studying, not to mention major events and making domestic tourism a competitiveness factor for leveraging the national economy.

In 2016 we supported businesses and organizations, launching projects and concrete initiatives regarding training, information/business intelligence, entrepreneurship and innovation, simplification, competitiveness and capitalization of companies.

In the coming years we would like to continue to help businesses and organizations, making the relationship between the public administration and tourism businesses agile and proactive, as well as helping to strengthen Turismo de Portugal I.P. and bring it closer to businesses with respect to investment, qualification, markets and knowledge.

CONTENTS

Executive Summary

| | |
|---|-----------|
| I. Tourism Strategy 2027: thinking about the future, acting in the present | 11 |
| II. The process of constructing a shared strategy | 14 |
| III. Where are we? – The performance of tourism in Portugal | 23 |
| III.1. A decade under review - 2005-2015 | 24 |
| III.2. Tourism today - 2016 | 38 |
| III.3. Internal context vs. external context | 41 |
| IV. Changes, Outlooks and Challenges | 43 |
| IV. 1. International Changes and Outlooks | 44 |
| IV. 2. 10 challenges for a 10 year strategy | 45 |
| V. Where do we want to be? – A strategic guideline for the decade | 46 |
| V. 1. Vision | 47 |
| V.2. Targets | 48 |
| VI. How do we get there? – A strategic guideline for the decade | 51 |
| VI.1. Strategic Assets | 52 |
| VII.2. Pillars and lines of action | 55 |
| VII.3. Strategic summary | 57 |
| VII. Implementation 2017-2020 | 58 |
| V.1. Types of priority projects | 59 |
| V.2. Markets | 64 |
| VIII. Management and monitoring model | 66 |

EXECUTIVE SUMMARY

Tourism is the main driving force of the Portuguese economy and the results obtained in 2016 have confirmed the importance of strong investment and collaborative work between public and private entities, as begun over a decade ago.

2016 was marked by historic results for national tourism with respect to the main indicators: overnight stays, revenue, guests, employment and exports, and it has even become the country's largest exporting activity, accounting for 16.7% of exports.

In addition, tourism growth was seen in all regions throughout the year, producing the desired effect of spilling over to and leveraging the national economy.

Despite the current positive situation of Portuguese tourism, we need to prepare for the future, entering into long term commitments, promoting team work involving all the participants in the activity and anticipating the challenges of the next decade. The Tourism Strategy for Portugal (Tourism Strategy 2027) is thus based on discussion that is open to everyone and which everyone can participate in.

This document defends a long term vision that is compatible with concrete short term actions, thereby allowing for more strategic action in the present, while also being part of the future European support framework 2021-2027.

Leading the tourism of the future is the motto of this strategy, focused on People, which:

- **Defines a vision:** establish tourism as a hub for economic, social and environmental development throughout the territory, positioning Portugal as one of the most competitive and sustainable tourism destinations in the world;
- **Establishes priorities**, defining five strategic pillars with the respective lines of action:
 - add value to the territory;
 - drive the economy;
 - leverage knowledge;
 - generate connectivity networks;
 - increase Portugal's profile
- **Agrees to targets** related to economic, social and environmental sustainability.
- **Economic sustainability targets:**
 - increase demand throughout the territory: 80 million overnight stays;
 - increase in value: 26 billion euros in revenue
- **Social sustainability targets:**
 - spread out tourism activity over the entire year and by 2027 achieve the lowest ever seasonality index;
 - double the amount of secondary and post-secondary degrees in tourism (from 30% to 60%)
 - ensure that tourism generates a positive impact on resident populations;
- **Environmental sustainability targets:**

- ensure that over 90% of tourism companies adopt efficient measures with regard to usage of energy and water and develop environmental waste management actions
- **Focuses on ten strategic actions for national tourism:** people; climate and light; history and culture; sea; nature; water; food and wine; artistic-cultural events, sporting and business events; well-being; living – living in Portugal.

The Strategy designed herein to be constructed by everyone involves planning with a broad horizon and contains the main lines of action, implemented through projects geared toward the short and medium term. As such, the strategic document defines a series of priority projects for horizon 2017-2020, incorporated into the various strategic pillars.

Because it is a strategic ten year document aimed at fulfilling the purpose it was created for, some flexibility is required in terms of its construction and ongoing monitoring. As such, Tourism Strategy 2027 offers a management and monitoring model consisting of: (i) management entity – Turismo de Portugal I.P.; (ii) regional and thematic strategic tourism laboratories that promote ongoing involvement of participants and (iii) holding of an annual tourism forum.

The creation of Tourism Strategy 2027 was based on a living, open and participated process, a model that we wish to follow and strengthen in its implementation.



01

TOURISM STRATEGY 2027

THINKING OF THE FUTURE,
ACTING IN THE PRESENT

TOURISM STRATEGY 2027

THINKING OF THE FUTURE, ACTING IN THE PRESENT

WHAT IS IT?

Tourism Strategy 2027 is the **strategic guideline** for tourism in Portugal over the next decade and it was created on the basis of a broad and creative participatory process in which the State accepts its responsibility and mobilizes its agents and society.

It is based on a **long term vision**, combined with **short term action**, allowing for more strategic action in the present and being part of the future European support framework 2021-2027.



This is a long term **shared strategy** for Tourism in Portugal, with the following goals:

- | Offer a strategic framework to be used as a guideline for national tourism for the next 10 years;
- | Ensure stability and acceptance of commitments regarding the strategic options for national tourism;

- | Promote integration of sectoral policies;
- | Generate ongoing joint action between the various tourism stakeholders;
- | Act with a sense of strategy in the present and in the short/medium term.

|ROAD MAP





02

THE PROCESS OF CONSTRUCTING A SHARED STRATEGY

THE PROCESS OF CONSTRUCTING A SHARED STRATEGY

KICK-OFF

An open and participatory strategy that involved both conventional and out-of-the-box perspectives on Tourism.

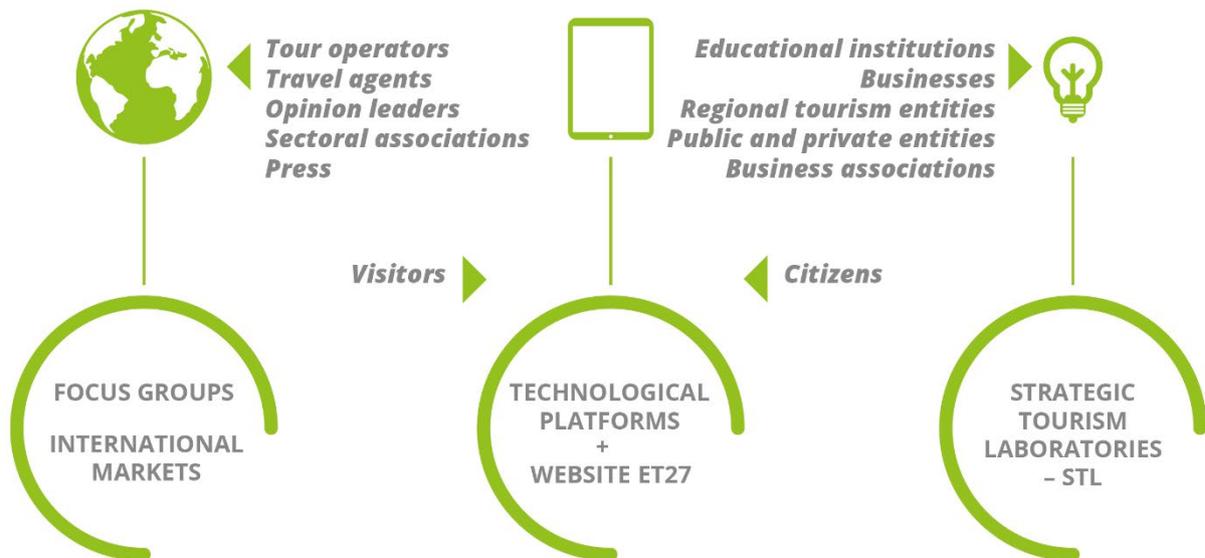


Tomar, 24 May 2016
Conference for the launch of the public discussion process

PUBLIC CONSULTATION

The public participation process was invigorated through technological platforms, international focus groups and Strategic Tourism Laboratories/Public Sessions, and it took place from 24 May 2016 to 6 January 2017.

CONSTRUCTION PROCESS



FOCUS GROUPS

The public participation process included holding focus groups and bilateral meetings in some of the main issuer markets with the aim of listening to those who market and communicate the Portuguese tourism offerings.

These meetings took place in 5 strategic markets, namely Spain, France, Germany, United Kingdom and Brazil, involving over 80 participants.



FOCUS GROUPS IN NUMBERS



MAIN CONCLUSIONS

| THE MOST POSITIVE | IMPROVEMENTS NEEDED |
|--|---|
| Authenticity with modernity and preservation of the Destination | Product structuring |
| People / Hospitality | Experience – especially during low season |
| Security | Flights throughout the year |
| History and Culture | Lack of Qualified Human Resources in specific areas (e.g., languages, active tourism) |
| Surprising – exceeds expectations | Information regarding what exists in Portugal |
| Diversity of the offerings – freedom to travel | Notoriety – destination still not well known, other than sun and beach |

| | |
|---------------------------------------|--|
| Increased flight routes | More effective Promotion directed at the markets |
| Price/quality ratio of service | Coordination between tourism regions |
| | Information and mobility conditions for visiting the country |

PUBLIC CONSULTATION | *TECHNOLOGICAL PLATFORMS AND WEBSITE*



WHAT ARE THE CHALLENGES OVER THE NEXT 10 YEARS? TS 27 QUESTIONNAIRE – PARTICIPATE!

- | Specific website Tourism Strategy 2027
- | Supply of documents and public presentations
- | Digital communication and social networks
- | Activities report
- | Online questionnaire

ONLINE PARTICIPATION

With the motto “**What are the 5 main challenges for Tourism in Portugal over the next 10 years?**”, online public participation and involvement in defining the challenges of Tourism Strategy 2027 was encouraged.

According to the responses, the 5 main challenges identified by the participants were:

- | Prevent Seasonality
- | Value Heritage and Culture
- | Spread out Demand
- | Qualification and Improvement of Human Resources
- | Stimulate Innovation and Entrepreneurship

PUBLIC CONSULTATION | *STRATEGIC TOURISM LABORATORIES*

Strategic Tourism Laboratories/public sessions were held in all regions of the country with the following aim:

- | Obtain contributions and recommendations
- | Analyse the main tourism indicators of each region
- | Debate the strategic priorities for regional and national tourism.

These sessions involved more than 1400 participants.



OUTLINES

Strategy 2027: opportunity and relevance of the country having a Tourism Strategy for the next 10 years;

Network coordination and action: strengthen the coordination of actions between the various actors and greater partnership work;

Funding: ensure coherence between strategy and funding;

Notoriety: increase the notoriety of Portugal and its regions in external markets;

Human Resources: shortage of qualified human resources;

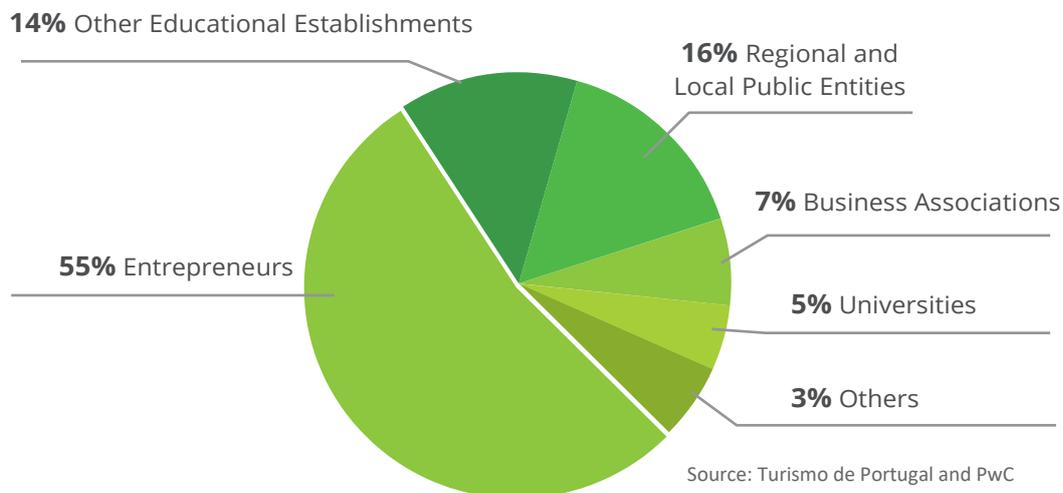
Training: meeting companies' needs to a greater extent;

Knowledge: deepening knowledge on demand and improving statistical information.

STRATEGIC TOURISM LABORATORIES IN NUMBERS



PROFILE OF THE PARTICIPANTS IN THE STRATEGIC TOURISM LABORATORIES



- | 1431 participants
- | Diversified Representation
- | Significant corporate representation

TERRITORIAL SCOPE OF THE STRATEGIC TOURISM LABORATORIES THAT WERE HELD



PUBLIC CONSULTATION | *OPINIONS*

| Municipalities | *Ecclesiastica* | Entities | Municipal Associations | *Business Associations*

| Confederations of Business Associations | *Higher Education Level Institutions* | Citizens | *Trade Unions*

PUBLIC CONSULTATION | *COMMUNICATION*

The entire public consultation process was subject to broad communication and disclosure by various means, having allowed and generated a significant involvement of society.

The general outline of Tourism Strategy 2027 was presented to the social partners at the Social Dialogue Standing Committee meeting on 12 May 2016. Tourism Strategy 2027 was also presented to the Assembly of the Republic as part of the Tourism Work Group of the Economy, Innovation and Public Works Committee.



03

WHERE ARE WE? PERFORMANCE OF TOURISM IN PORTUGAL

WHERE ARE WE?

PERFORMANCE OF TOURISM IN PORTUGAL

A DECADE UNDER REVIEW 2005-2015 | SUPPLY

INCREASE IN THE ACCOMMODATION CAPACITY

- In quantity and quality, we have seen the following:
- Qualification/upgrade of tourism accommodation in the country;
 - Increase of almost 6 pp in the share of the capacity of 4 and 5 star hotels (between 2009 and 2015).

Graph 1 – Accommodation capacity in hotel establishments, resorts, tourist apartments and other accommodations (thousands)

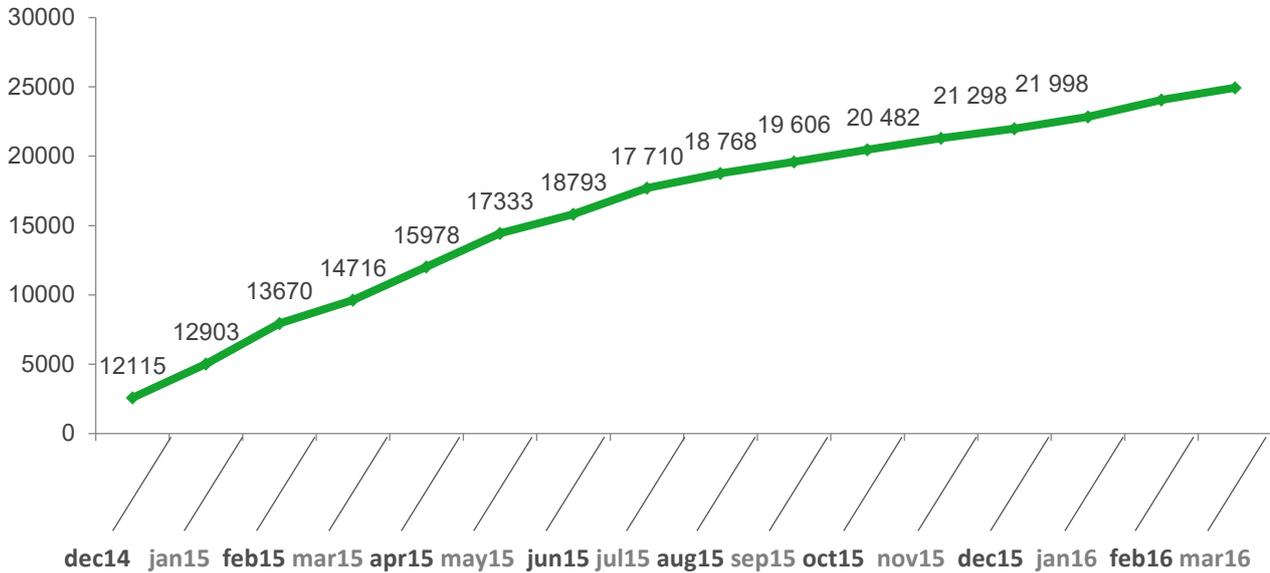


Source: INE (Statistics Portugal)
Note: *Years without information on the accommodation categories

GROWTH IN NEW TYPES OF ACCOMMODATION

Local accommodation units: apartments, hostels, ...

Graph 2 – Monthly trend in local accommodation registrations from December 2014 to December 2015.

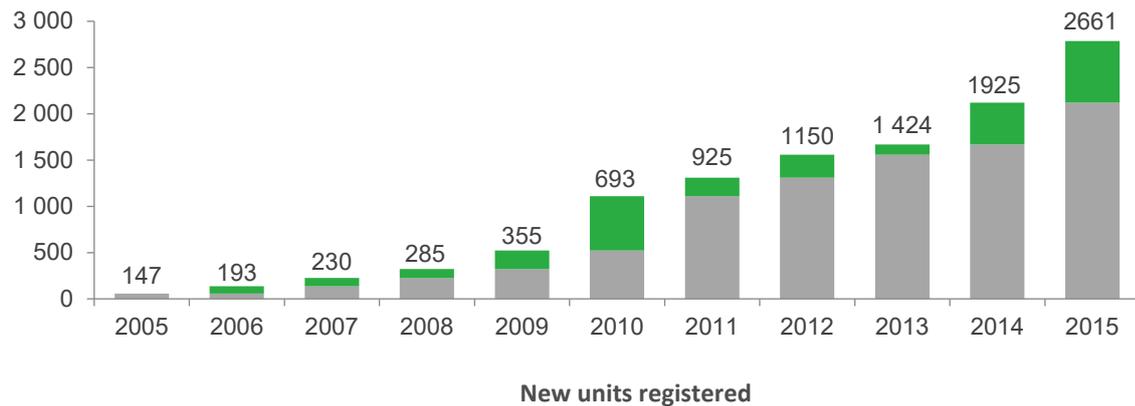


Source: Turismo de Portugal; Date 5/12/2016

INCREASE IN REGISTRATIONS OF TOURISM ENTERTAINMENT ACTIVITIES

Between 2005 and 2015 new tourism entertainment agents appeared, a significant increase having taken place.

Graph 3 – Annual trend in registrations of tourism recreational companies

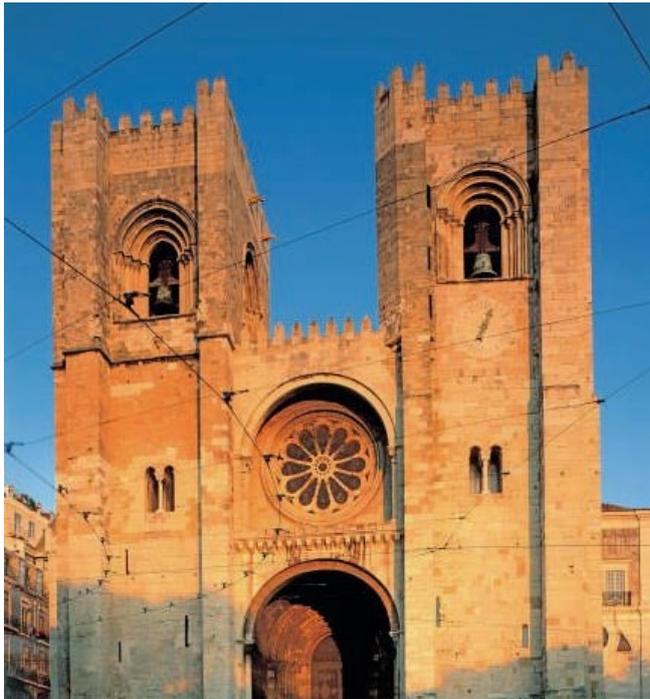


Source: Turismo de Portugal; Date 16/12/2016



Supply of more qualified tourism resources and better support infrastructures

- | *Historical-cultural heritage*
- | *Protected areas*
- | *Historical centres*
- | *Beaches*
- | *Fluvial navigation*
- | *Accessibility*

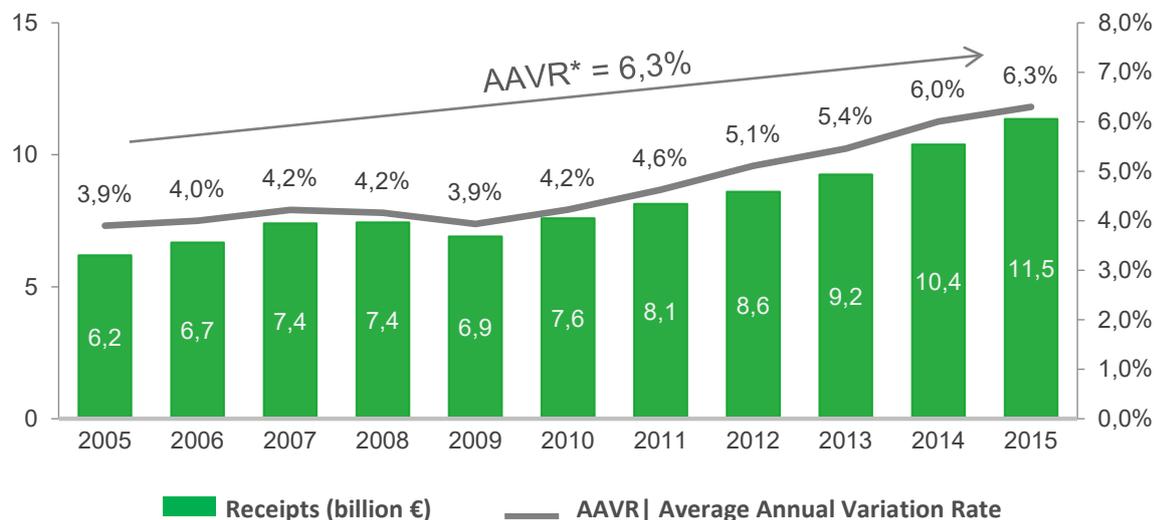


A DECADE UNDER REVIEW 2005-2015 | DEMAND

INCREASE IN TOURISM RECEIPTS

Between 2005 and 2015 tourism receipts grew at an average annual rate of 6.3%

Graph 4 – Tourism Receipts in amount and in % of GDP



Source: Bank of Portugal

GROWTH IN TOURISM RECEIPTS – COMPARATIVE ANALYSIS BETWEEN COMPETITOR COUNTRIES

Between 2005 and 2015, Portugal recorded average annual growth higher than that of its competitors and it was the country with second best performance in terms of tourism revenue.

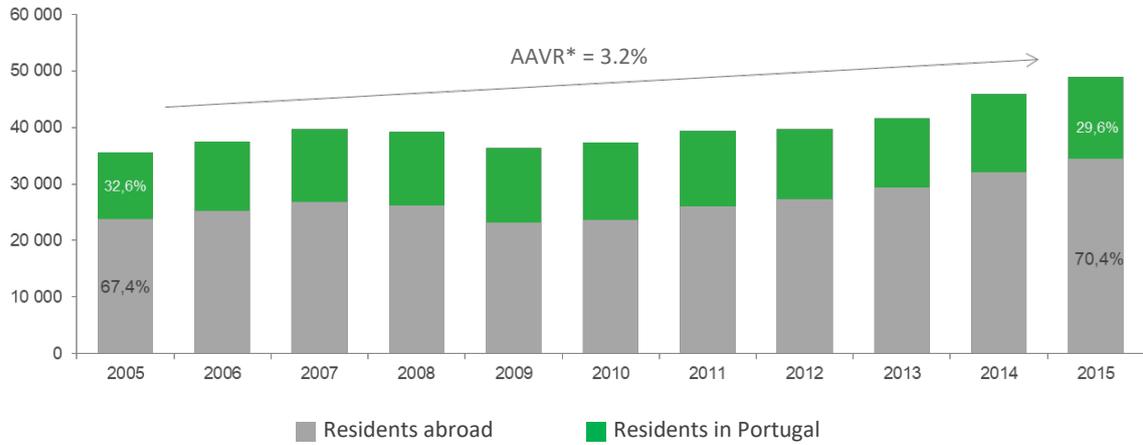
| INTERNATIONAL TOURISM RECEIPTS (billions €) | 2005 | 2010 | 2015 | AAVR 2005-2015 |
|--|-------|------|------|----------------|
| Malta | 0.6 | 0.8 | 1.2 | +7.4% |
| Portugal | 6.2 | 7.6 | 11.5 | 6.3% |
| Turkey | 15.4 | 17.0 | 24.0 | +4.5% |
| Morocco | 3.7 | 5.1 | 5.3 | +3.7% |
| Croatia | 5.9 | 6.1 | 8.0 | +3.1% |
| Greece | 10.7 | 9.6 | 14.1 | +2.8% |
| Spain | 40.00 | 41.2 | 50.9 | +2.4% |
| Italy | 28.5 | 29.3 | 35.6 | +2.2% |
| France | 35.4 | 35.5 | 41.4 | +1.6% |
| Egypt | 5.5 | 9.4 | 5.5 | +0.0% |
| Tunisia | 1.7 | 2.0 | 1.2 | -3.2% |

Source: World Tourism Organization (UNWTO), January 2017

INCREASE IN OVERNIGHT STAYS

BETWEEN 2005 and 2015 overnight stays grew at an average annual rate of 3.2%.

Graph 5 – Overnight stays at hotel establishments, resorts, tourist apartments and other accommodation (%)



Source: INE (Statistics Portugal)

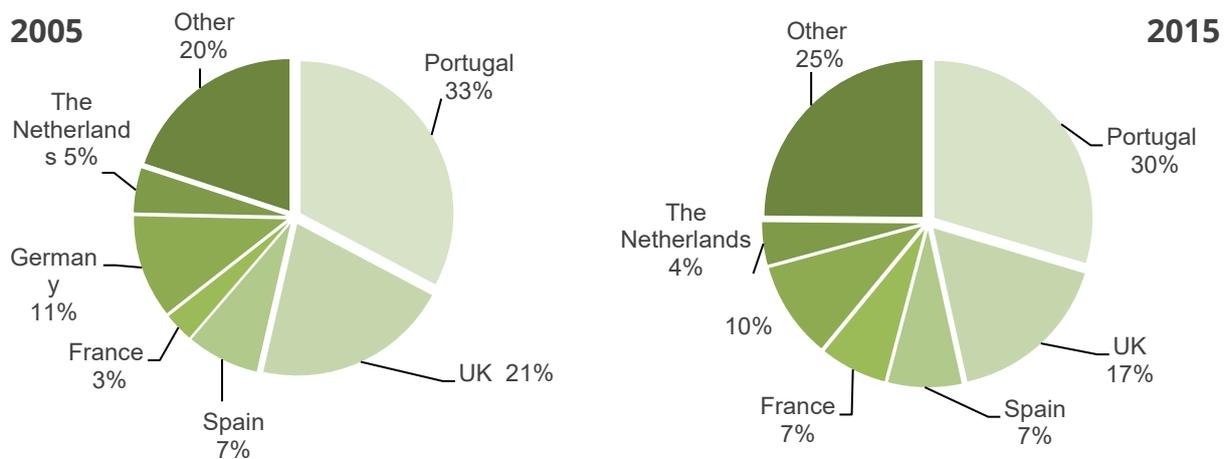
*Average Annual Variation Rate

MARKET TRENDS

Over a span of 10 years, we have seen a tendency to maintain the importance of the main issuer markets.

As such, we must diversify the origin markets, including strengthening of the internal market and growth in non-traditional issuer markets.

Graph 6 – Overnight stays per market in hotel establishments, resorts, tourist apartments and other accommodation (%)

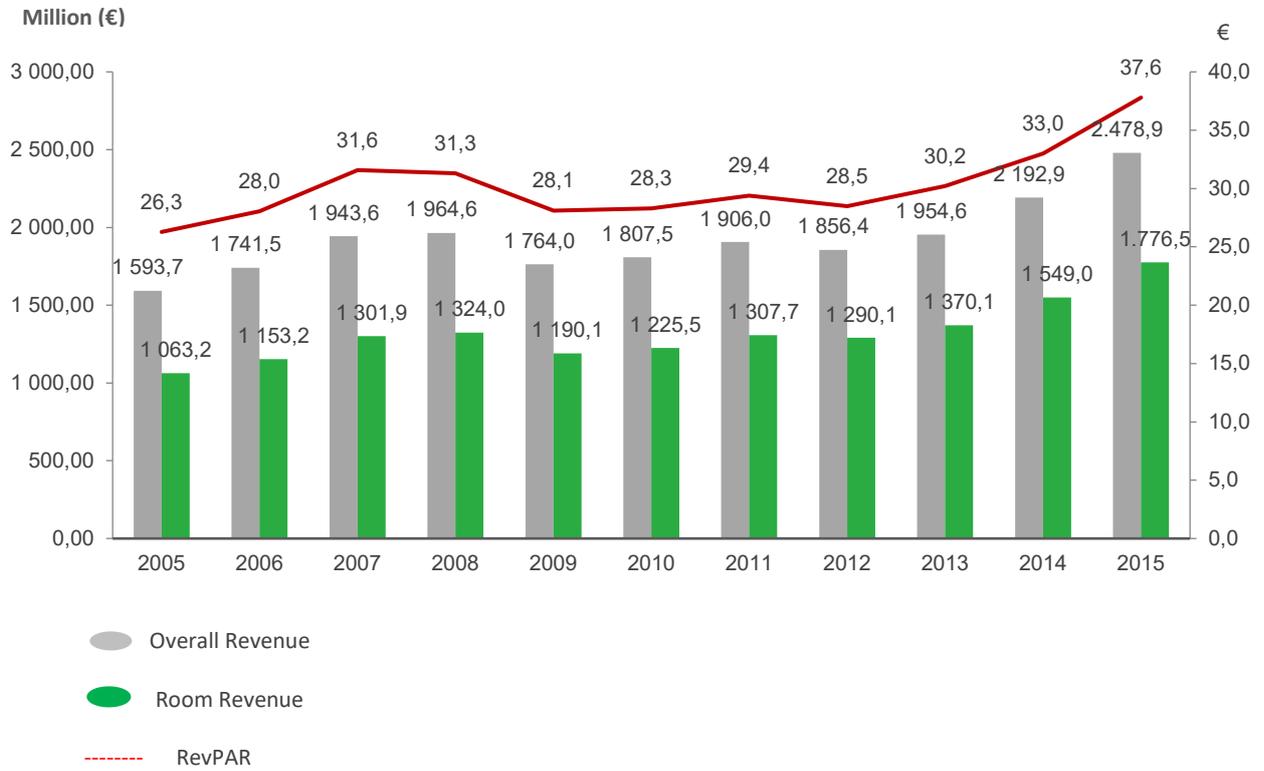


Source: INE (Statistics Portugal)

GROWTH IN REVENUE AND IN RevPAR

Between 2005 and 2015 overall revenue grew at an average annual rate of 4.5%.

Graph 7 – Revenue and RevPAR of hotel establishments, resorts, tourist apartments and other accommodation (€)

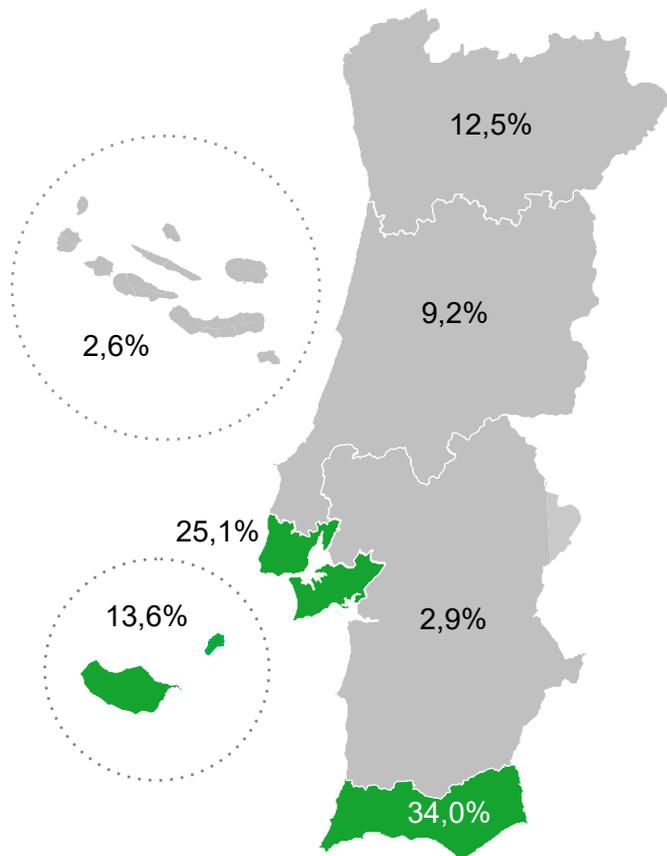


Source: INE (Statistics Portugal)

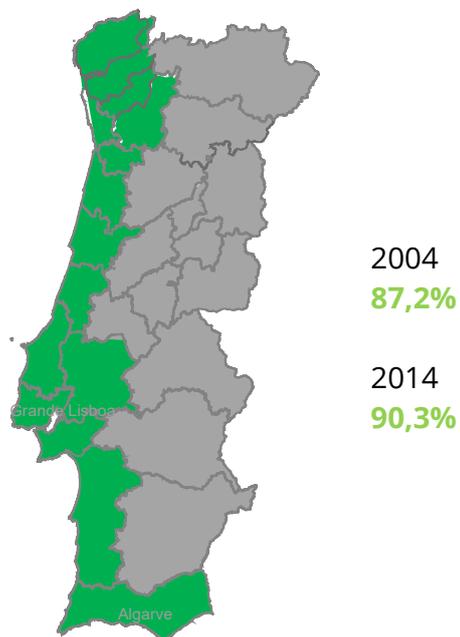
REGIONAL ASYMMETRIES

There are still regional asymmetries in Portugal, as we can see in the following maps.

73% of overnight stays in the country were concentrated in three regions (2015)



90.3% of overnight stays in the country (mainland) were concentrated on the coast, a trend that has increased over the past 10 years

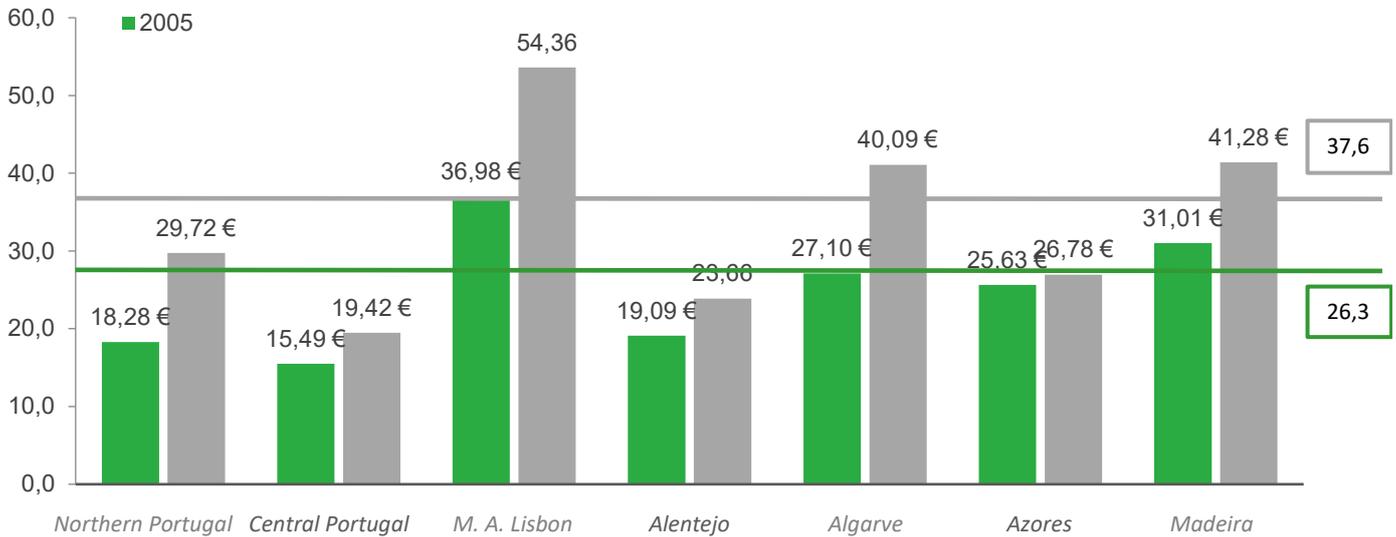


REGIONAL ASYMMETRIES -- RevPAR (Revenue per Available Room)

Regional asymmetries can also be seen in terms of RevPAR.

For instance, the RevPAR of the Lisbon region is more than double that of the central region.

Graph 8 - RevPAR per region of the hotel establishments, resorts, tourist apartments and other accommodation (€)

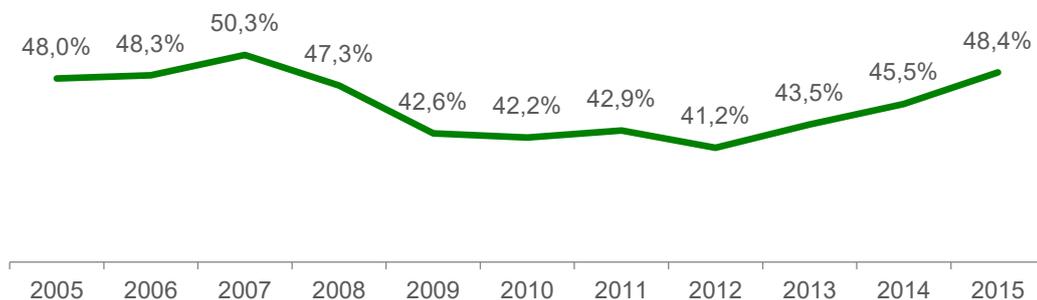


TRENDS IN OCCUPANCY RATES

Despite the gradual growth seen, in 2015 this indicator had not reached the level obtained in 2007.

In 2015, more than half the beds in Portugal remained unoccupied during the year. Demand totalled 49 million overnight stays, but the installed capacity in Portugal allows for over 100 million overnight stays.

Graph 9 – Average bed occupancy rates in hotel establishments, resorts, tourist apartments and other accommodation



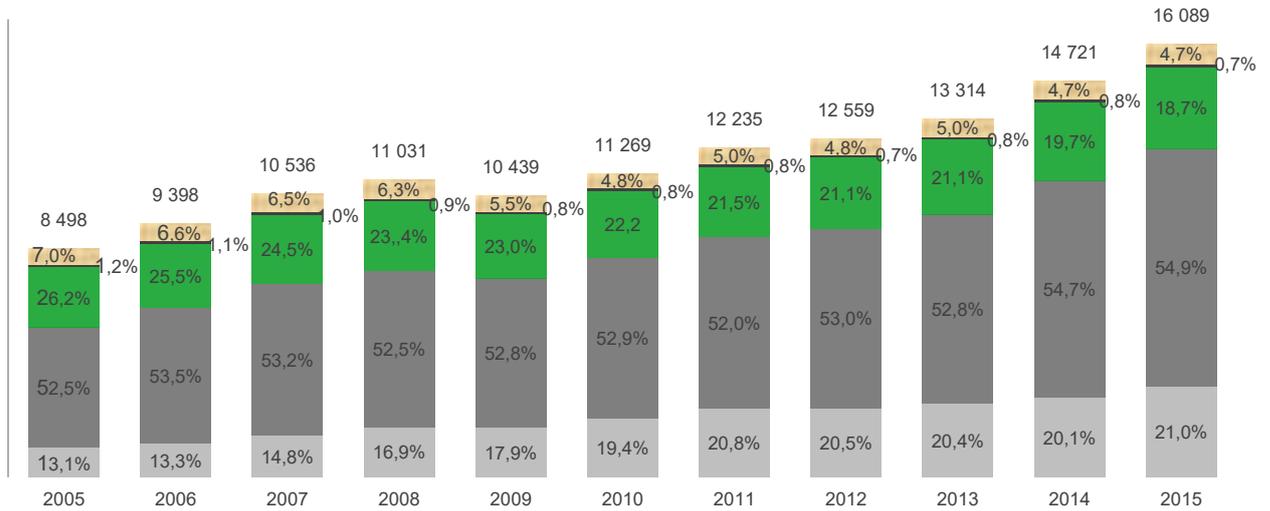
Source: INE (Statistics Portugal)

GROWTH IN PASSENGER FLOWS ON INTERNATIONAL FLIGHTS

Between 2005 and 2015 there was a rise in passenger flows on international flights, almost doubling, going from 8.5 million to 16.1 million passengers.

Graph 10 – Passenger flow on international flights at international airports

Million

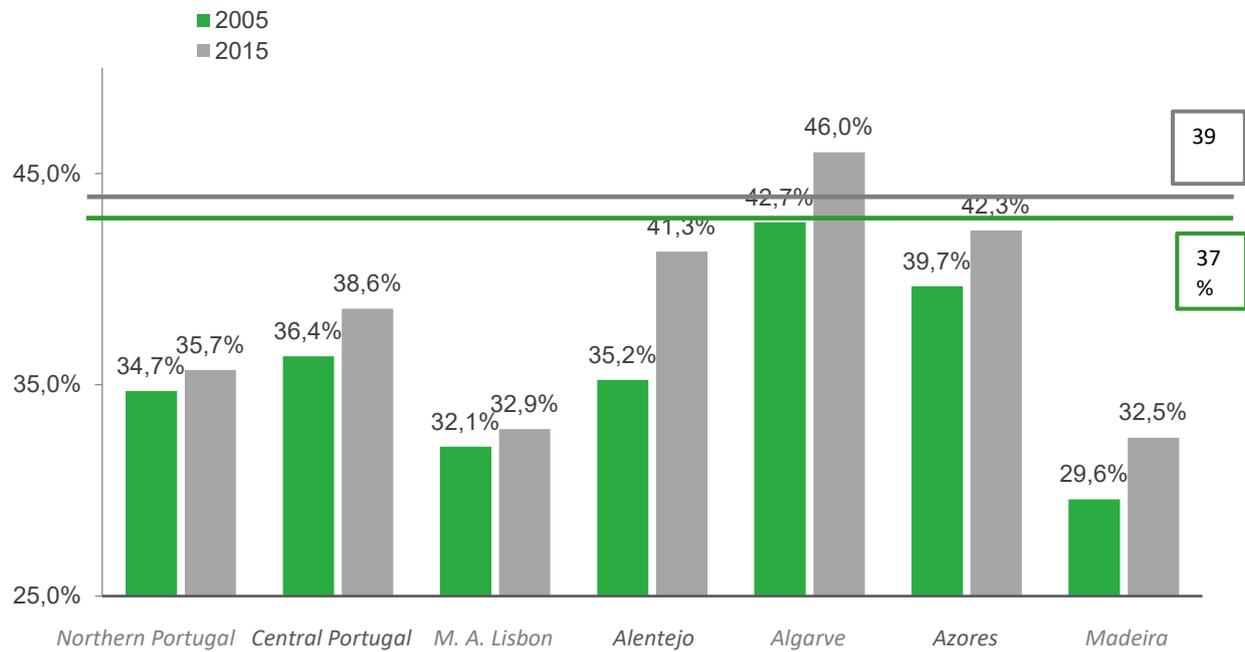


■ Funchal and Porto Santo Airports
 ■ Ponta Delgada Airport
 ■ Faro Airport
 ■ Porto Airport
 ■ Lisbon Airport

Source: ANA

INCREASE IN SEASONALITY

Graph 12 – Average annual seasonality rate per region



Source: INE (Statistics Portugal)

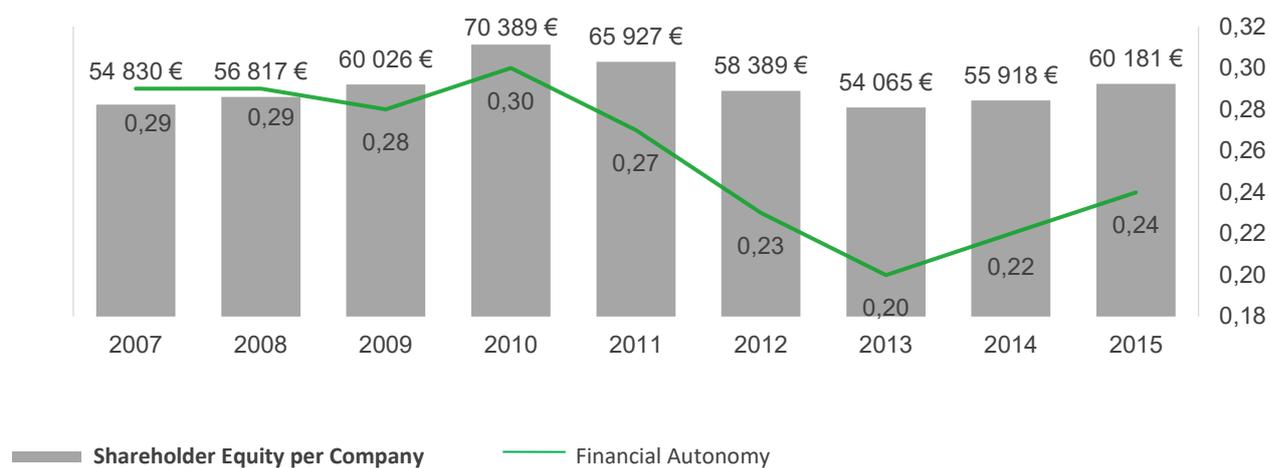
Note: Seasonality rate - indicator that allows assessment of the relative weight of tourism demand during the months of highest demand relative to the annual total, measured via the number of overnight stays in hotel establishments, resorts, tourist apartments and other accommodation.

The Algarve Region saw the highest seasonality rate in 2015.

A DECADE UNDER REVIEW 2005-2015 | COMPANIES

DECLINE IN FINANCIAL AUTONOMY OF TOURISM COMPANIES*

Graph 14 – Shareholder Equity and Financial Autonomy of the companies whose main activity pertains to section I of the Classification of Economic Activities rev3 (Accommodation, restaurants and similar)



Source: INE (Statistics Portugal)

*Tourism includes accommodation activities and restaurant and similar services.

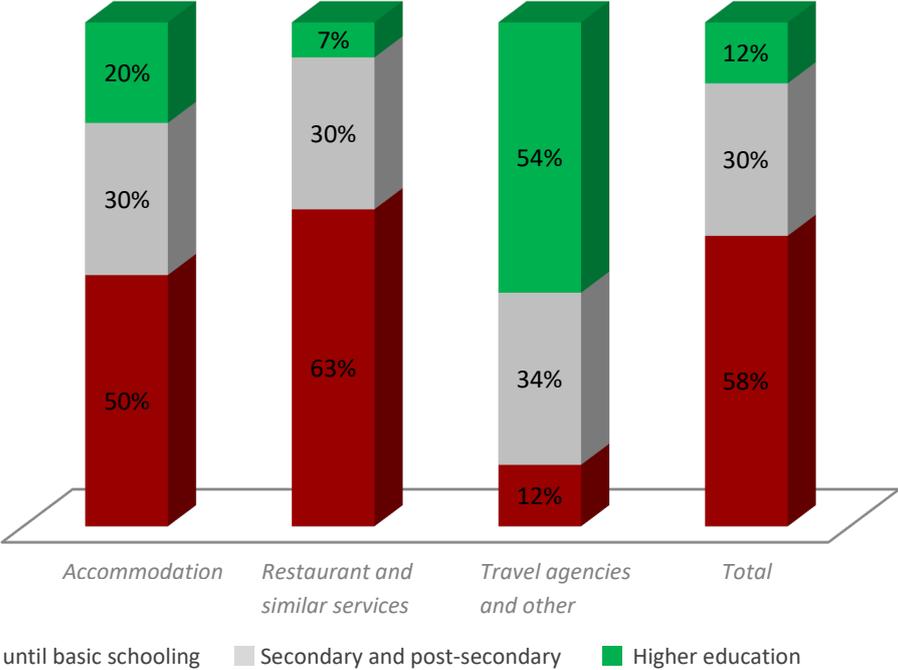
Note: Financial autonomy – financial indicator that translates the degree of solvency of the company, i.e. the capacity to finance activities through its own resources (equity/net assets).

A DECADE UNDER REVIEW 2005-2015 | TRAINING

QUALIFICATION LEVELS

58% of the population employed in tourism* has achieved the basic level of schooling.

Graph 15 – Population employed per degree of qualification and activity sectors in 2015



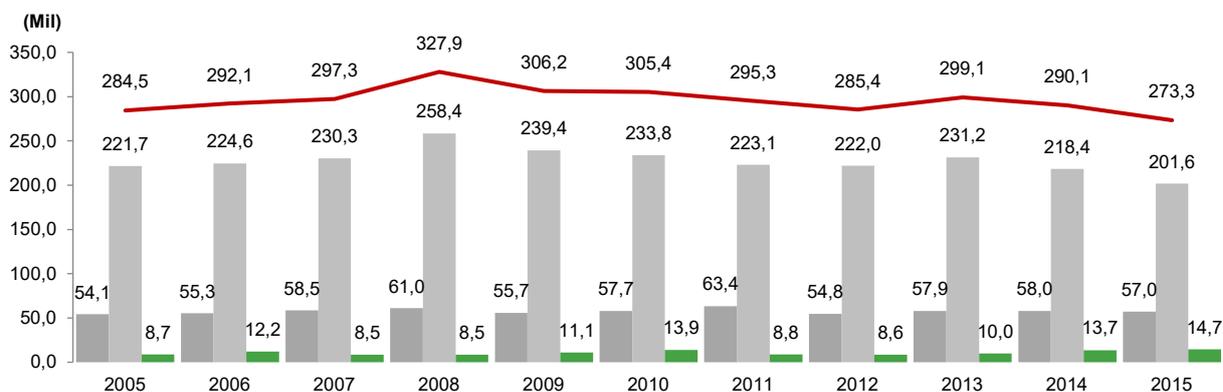
Source: INE (Statistics Portugal)

*Accommodation, restaurant and similar services, travel agencies and other, Total

REDUCTION OF THE POPULATION EMPLOYED IN TOURISM 2005-2015

The drop in the number of people employed in Tourism was felt more significantly in the Restaurant sector – the most penalized in the past years. Between 2005 and 2015 tourism employment showed an average annual drop of -0.4%, close to stagnation, versus -1.2% for the overall economy. Between 2012-2015, 12,100 jobs were lost.

Graph 16 – Employment per levels of qualification and activity sectors



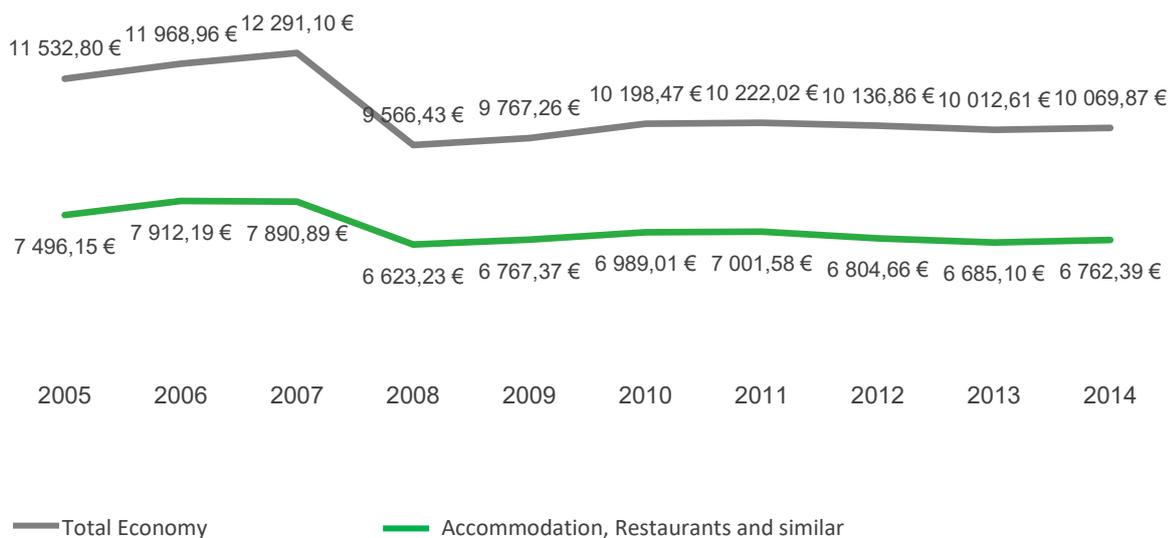
- Accommodation | Restaurant and Similar | Travel and Tourism Agencies and Tour Operators | Tourism*

Source: INE (Statistics Portugal)

Note: *Tourism includes Accommodation, Restaurants and Travel Agencies

INCOME OF TOURISM PROFESSIONALS

Graph 17 – Average yearly wage per worker per sector of activity



Source: INE (Statistics Portugal)

The average annual income of someone working in the hotel and restaurant industry is approximately 33% lower than that of the economy as a whole.

A DECADE UNDER REVIEW 2005-2015 | SUMMARY

INTERNATIONAL RANKING



Source: UNWTO (2016); Eurostat (2016); INE (2016); World Economic Forum (2015)

A DECADE UNDER REVIEW – SUMMARY

| POSITIVE FACTORS | IMPROVEMENTS NEEDED |
|---|---|
| Territory and more qualified tourism resources | Capitalization of companies |
| Infrastructure that supports development | Qualification of Human Resources |
| Growth in various tourism demand indicators | Income of tourism workers |
| More qualified accommodation offerings | Bureaucracy and contextual costs |
| New forms of accommodation | Digitalization of the tourism offerings |
| Growing creative entrepreneurship | Seasonality |
| Increased supply of tourism entertainment activities | Regional asymmetries |
| Recognition and international awards in various areas of Portuguese tourism | Information on Portugal in the external markets |
| Increased flight routes | Networking and joint promotion and co-creation |
| | Sustainability of the destination and companies |

TOURISM TODAY – 2016

In 2016, tourism reached record numbers in Portugal, especially with respect to:

- broadening of the tourism activity to include less traditional months, two-thirds of the growth having occurred during the so called “low season”;
- decrease in the seasonality index from 37% to 35%;
- 14.2% increase in tourism employment;
- all regions saw significant growth, especially the Azores with 21% growth, Porto and Northern Portugal with 13% and Alentejo 11%;
- strong growth in demand in the Algarve during the shoulder period;
- growth of tourism revenue and hotel revenue higher than the increase in guests;
- increase of 1.5 million seats in flight capacity;
- diversification of markets with significant growth in the U.S., Polish and Brazilian markets;
- 5% growth in the internal market;
- significant increase in the number international awards (491, compared with 157 in 2015);
- 1,500 new companies linked to tourism entertainment;
- increase of the relative weight of tourism in exports, accounting for 16.7% of the country’s total exports of goods and services.

These results showed tourism’s capacity for generating more revenue, more employment and the ability to increasingly spread out the activity throughout the year and across the territory.

In 2016 various projects with these goals were implemented.

1. Promote air travel competitiveness and market diversification:

- program promoting flight routes and tourism operations. In 2016 there were 64 new air travel operations, especially connections to new destinations and broadening of operations to span the entire year;
- promotional actions and campaigns with tour operators;
- 1,215 press trips and 15,900 international articles about tourism in Portugal.

2. Resolve the financial difficulties of tourism companies and the low level of financial autonomy, spur investment:

- financial instruments that are specific to tourism, with deadlines and conditions adapted to tourism investment (namely the line for qualification of supply 2016, with an increase of 60 million euros and venture capital);
- capitalize program;
- accelerated execution of PT 2020, going from 1 paid project in 2015 to 74 in 2016;
- return of tax competitiveness in the restaurant industry by returning the VAT rate to 13%.

3. Qualify, improve and diversify supply:

- the Valorizar [Improve] program for promoting and invigorating tourism offerings in the country’s interior regions, as part of the National Program for Territorial Cohesion;
- the “all for all” program improving and adapting supply to make Portugal a destination accessible for everyone;
- “Portugal Wi-Fi” program for installing free Wi-Fi in historic centres;
- “Revive” program for restoring thirty public buildings throughout the country, converting them into economic assets that generate employment and wealth among the populations and regions where they are located;
- *Portuguese trails*;
- pilot project entitled cycling & walking in the Algarve.

4. In order to generate new demand and attractiveness throughout the entire year:

- program for attracting international conventions and corporate events with a specialized team;
- lengthening of the international surf competitions calendar to cover the whole year, Portugal having become the only country to host all of the WSL competitions;
- “365 Algarve” program with 1,022 cultural events in the Algarve from October to May;
- launch of the internal tourism campaign known as “put Portugal on the map,” a campaign for mobilizing Portuguese people to share the best of Portugal and to be an active part of promoting the country.

5. Foster innovation and tourism entrepreneurship:

- launch of the “Tourism 4.0” program, which includes actions related to: incubation, acceleration, investment and internationalization of over 200 tourism companies;
- implementation of an entrepreneurship program in hotel and tourism schools - *Tourism Creative Factory*;
- venture capital line for innovative projects.

6. In order to qualify and value people:

- strong investment in Hotel and Tourism Schools;
- revision of tourism school curriculums with a focus on soft skills, behavioural areas, languages and digital skills, making sure training is suited to market needs;
- creation of an education and training network for tourism;
- increase in the national minimum wage.

To sum up, 2016 has shown that collaborative team work focused on clear objectives has allowed us to attain results that show that tourism has the capacity to be a sustainable activity throughout the entire year, able to add value. An essential part of this requires defining the desired targets and developing the actions necessary to attain them.

THE IMPORTANCE OF TOURISM TODAY

| | 2015 | 2016 ^{PO} | CHANGE |
|--------------------|--|--|-------------------------|
| Overnight stays | 48.9 million | 53.5 million | + 4.6 million + 9.4% |
| Revenue | 11.5 billion | 12.7 billion | + 1.2 billion + 10.4% |
| Guests | 17.4 million | 19.1 million | +1.7 billion + 9.7% |
| Exports | 15.4% of total Exports of the country's goods and services | 16.7% of total Exports of the country's goods and services | + 1.3% |
| Balance of Tourism | €7.8 billion | €8.8 billion | + billion + 12.8% |
| Employment | 280 thousand | 328 thousand | + 48 thousand + 17.1% |

Employment includes accommodation, restaurant and similar services, travel agencies/tour operators and other reservation services.

Source: INE and Social Security. Employment data is for January 2015 and January 2017. PO: provisional data.

The growth seen in 2016 took place in all the regions and throughout the entire year and it is an important regional development factor.

MAIN INDICATORS OF THE TOURISM ACTIVITY PER REGION NUTS II – 2016

AZORES A. R.

Overnight Stays: 1.5 million
 Bed Occupancy Rate: 47%
 Revenue: €70.7 million
 RevPAR: 32.3€

LISBON

Overnight Stays: 13.1 million
 Bed Occupancy Rate: 57.8%
 Revenue: €874.2 million
 RevPAR: 59.2€

MADEIRA A. R.

Overnight Stays: 7.3 million
 Bed Occupancy Rate: 71.0%
 Revenue: €376.1 million
 RevPAR: 47.8€

NORTHERN PORTUGAL

Overnight Stays: 6.9 million
 Bed Occupancy Rate: 50.2%
 Revenue: €361.9 million
 RevPAR: 35.1€

CENTRAL PORTUGAL

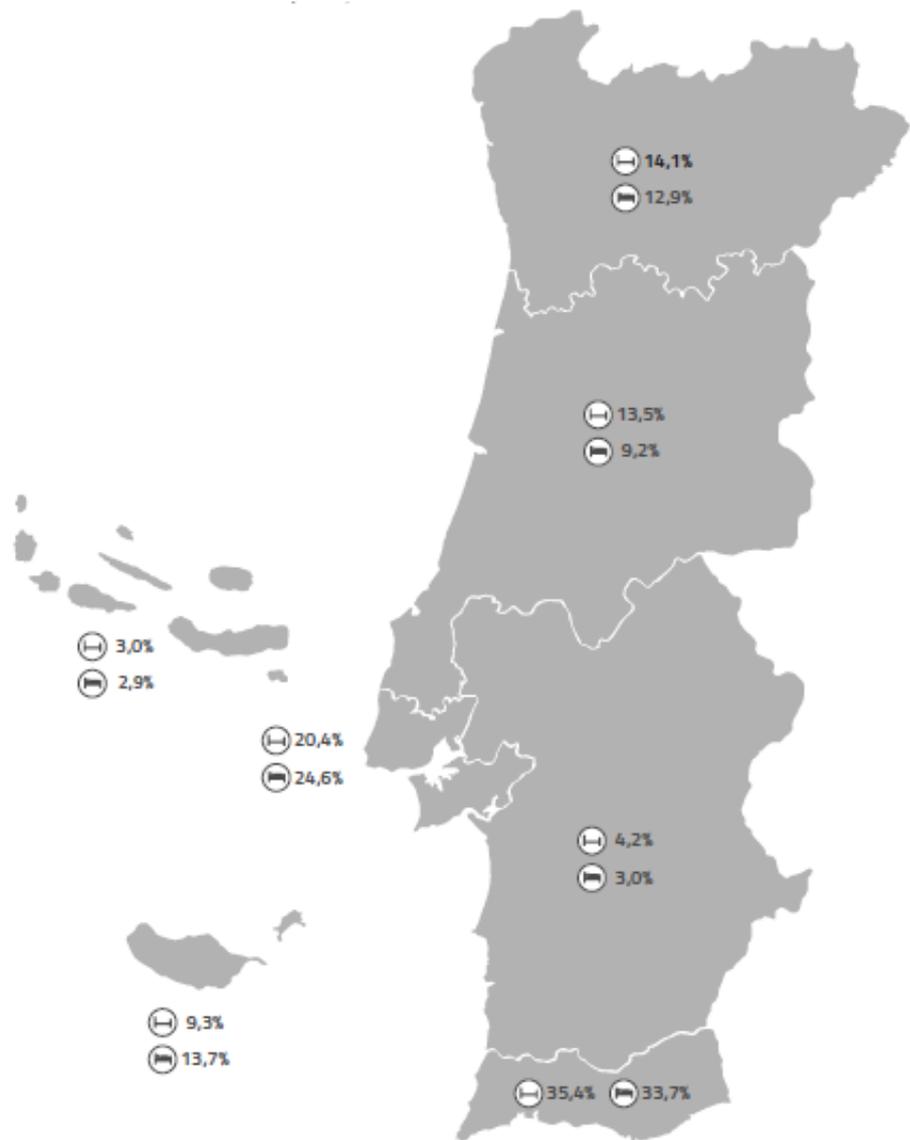
Overnight Stays: 4.9 million
 Bed Occupancy Rate: 36.3%
 Revenue: €228.5 million
 RevPAR: 21.2€

ALENTEJO

Overnight Stays: 1.6 million
 Bed Occupancy Rate: 35.2%
 Revenue: €84.7 million
 RevPAR: 26.8€

ALGARVE

Overnight Stays: 18.1 million
 Bed Occupancy Rate: 48.6%
 Revenue: €904.6 million
 RevPAR: 46.7€



Occupancy rates in hotel establishments, resorts and tourist apartments.

Source: INE (Statistics Portugal)

 Capacity
  Overnight stays

INTERNAL CONTEXT VS. EXTERNAL ENVIRONMENT

Having analysed the trends in tourism in Portugal, we would like to summarize the main weaknesses, opportunities and potentials for the next decade.



Positive and negative elements of the tourism value chain in Portugal over the last decade



Positive and negative elements of the tourism value chain in Portugal over the last decade



WHAT TO FOCUS ON?

WHAT TO PROTECT?

WHAT TO MITIGATE?

WHAT TO GROW?



INTERNAL CONTEXT

| POTENTIALS | WEAKNESSES |
|---|---|
| • Geostrategic location as an international hub | • Fragile economic-financial backdrop and under-capitalized companies |
| • Temperate climate, sunlight, sun, sea | • Some lack of institutional cooperation and cooperation between stakeholders who operate in the tourism market |
| • Diversity and high level of historical-cultural and natural heritage | • Lack of information regarding tourism offerings |
| • Enterprising and creative ecosystem linked to Tourism | • Lack of presence by tourism companies in the “digital world” |
| • Upgrade of the accommodation and restaurant offerings | • Lack of knowledge and information on tourism activity |
| • New forms of accommodation whose quality is recognized and which meets demand | • Insufficient presence of international brands/chains |
| • Hospitality | • Lack of product structuring |
| • Quality/price ratio | • Low level of qualifications and income of tourism professionals |
| • Security | • Absence of or insufficient tourism signs |
| • Diversity of the tourism offerings | • Contextual costs |
| • Authenticity with innovation | • Regional asymmetries |
| • Cuisine | • Seasonality |
| • Easy access and proximity between the various tourism destinations | • Lack of information in external markets regarding the destination of Portugal |
| • Number of Portuguese speakers around the world | • Tourism offering not sufficiently suited to the various markets and segments |
| • 60% of the Portuguese population speaks a second language | |

EXTERNAL ENVIRONMENT

| THREATS | OPPORTUNITIES |
|--|--|
| • Increased pressure on destinations and resources | • Growth forecasts for tourism until 2030 |
| • Difficult to affirm and develop destination Portugal as a European market in the face of growing demand for destinations outside of Europe and emerging new destinations | • Political recognition and inter-institutional mobilization for the development of tourism in the country |
| • Climate change | • Change in consumption patterns and motivations, which favour destinations that offer diverse and authentic experiences and environmental quality |
| • Growth of insecurity phenomena | • Growth of tourism for seniors and great financial availability for travel in several segments, which allow for growth in volume and value |
| • European economic-financial situation and commitment in access to financing | • Growing demand for healthy habits and health and well-being products |
| • Uncertain economic growth in some issuer countries | • Growth in combining holiday with business |
| • Possible overload of tourism in certain locations/destinations, which may lead to negative impacts on natural, environmental and social destinations | • Emergence of alternative forms of financing (e.g., crowdfunding, social entrepreneurship instruments) |
| • Protectionist policies | • Attraction of international investment |
| • Brexit and respective impacts | • Start of direct flights to new markets (namely China) |



04

CHANGES, OUTLOOKS AND CHALLENGES

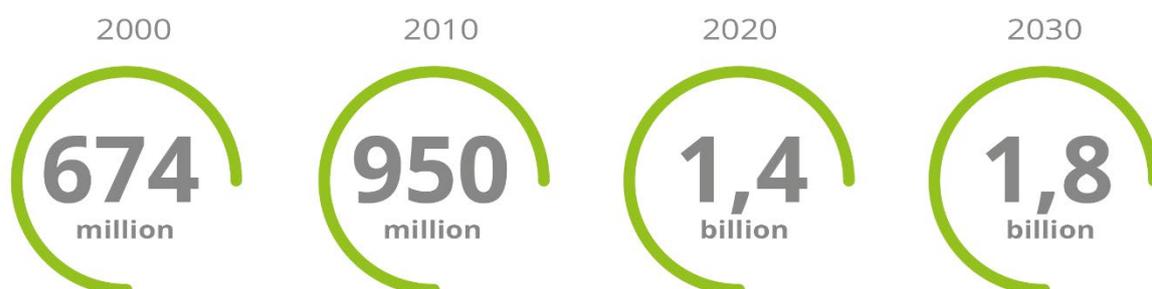
CHANGES, OUTLOOKS AND CHALLENGES

INTERNATIONAL CHANGES AND OUTLOOKS

Tourism Strategy 2027 was designed to make Portugal an increasingly competitive destination as part of an activity that is constantly growing, aware of international changes and the technological landscape

Tourism, a worldwide activity that is constantly growing

INTERNATIONAL ARRIVALS IN NUMBERS (2000-2030)



Source: UNWTO

Exponential growth in the number of international arrivals from 2000 to 2020, such growth expected to continue until 2030 in worldwide terms.

SOME INTERNATIONAL TRENDS THAT IMPACT TOURISM



10 CHALLENGES FOR A 10 YEAR STRATEGY

10 GLOBAL CHALLENGES FOR A 10 YEAR STRATEGY

1. PEOPLE

Promote employment, qualification and valuing of people, along with increasing the income of tourism professionals.

2. COHESION

Broaden tourism activity to include the entire territory.

3. GROWTH IN VALUE

Higher growth rate in revenue vs. overnight stays.

4. TOURISM THROUGHOUT THE ENTIRE YEAR

Expand the tourism activity so that it spans across the entire year, so tourism can be more sustainable.

5. ACCESSIBILITY

Guarantee competitiveness of the accessibility of destination Portugal and promote mobility within the territory.

6. DEMAND

Reach the markets that best respond to the challenges of growing in value and which allow tourism to take place across the entire year and throughout the entire territory.

7. INNOVATION

Stimulate innovation and entrepreneurship.

8. SUSTAINABILITY

Ensure preservation and sustainable economic qualification of cultural and natural heritage.

9. SIMPLIFICATION

Simplify legislation and make administration more agile.

10. INVESTMENT

Guarantee financial resources and spark investment.



05

**WHERE DO WE
WANT TO BE?**
A STRATEGIC GUIDELINE
FOR THE DECADE

WHERE DO WE WANT TO BE?

A STRATEGIC GUIDELINE FOR THE DECADE | *VISION*

Establish tourism as a hub for economic, social and environmental development throughout the entire territory, positioning Portugal as one of the most competitive and sustainable tourism destinations in the world.

WHERE DO WE WANT TO BE IN THE NEXT 10 YEARS?



LEADING THE TOURISM OF THE FUTURE

| | |
|--|--|
| PORTUGAL, SUSTAINABLE DESTINATION | ▶ Where tourism development is based on preserving and improving the country's natural and cultural heritage. |
| PORTUGAL, COHESIVE TERRITORY | ▶ Where there is tourism demand throughout the entire territory in a more homogeneous manner. |
| PORTUGAL, INNOVATIVE AND COMPETITIVE DESTINATION | ▶ Placing at the top of international rankings. |
| PORTUGAL, DESTINATION WHERE WORK IS VALUED | ▶ A country that invests in people, in their qualifications, values professionals and attracts talent. |
| PORTUGAL, DESTINATION TO VISIT, BUT ALSO INVEST IN, LIVE IN AND STUDY IN | ▶ A country that attracts tourists, but also investment. A country to live in, study in, invest in and establish companies in. |
| PORTUGAL, INCLUSIVE COUNTRY, OPEN AND CONNECTED TO THE WORLD | ▶ Tourism destination for everyone, technological, open to the world and with more connections to "old" and "new" worlds. |
| PORTUGAL, INTERNATIONAL HUB SPECIALIZING IN TOURISM | ▶ Leading country in the production of goods and services for tourism on a worldwide scale. |

A STRATEGIC GUIDELINE FOR THE DECADE | TARGETS

TARGETS FOR TOURISM IN PORTUGAL 2017-2027

| SUSTAINABILITY | | | | | | | |
|---|--|--|--|---|--|---|---|
| ECONOMIC | | SOCIAL | | | ENVIRONMENTAL | | |
| 1. OVERNIGHT STAYS THROUGHOUT THE TERRITORY | 2. REVENUE | 3. TOURISM THROUGHOUT THE ENTIRE YEAR | 4. QUALIFICATIONS | 5. SATISFACTION OF RESIDENTS | 6. ENERGY | 7. WATER | 8. WASTE |
| Goal: Increase tourism demand in the country and in the various regions | Goal: Increase in value. Grow at a pace that is higher in revenue rather than in overnight stays | Goal: Broaden the tourism activity to span the entire year | Goal: Increase the qualifications of the population that works in tourism | Goal: Ensure that the tourism activity generates a positive impact on the resident populations | Goal: Increase the levels of energy efficiency in tourism companies | Goal: Spark rational management of water resources in tourism | Goal: Promote efficient management of waste in national tourism activities |
| Target: 80 million overnight stays | Target: €26 billion | Target: Reduce the seasonality index from 37.5% to 33.5% | Target: Double the amount of secondary and post-secondary degrees in tourism from 30% to + 60% | Target: That + than 90% of the resident population considers that the impact of tourism on their territory is positive* | Target: That + than 90% of tourism companies adopt measures for using energy efficiently | Target: That + than 90% of tourism companies promote efficient usage of water in their operations | Target: That + than 90% of companies develop efficient waste management actions |

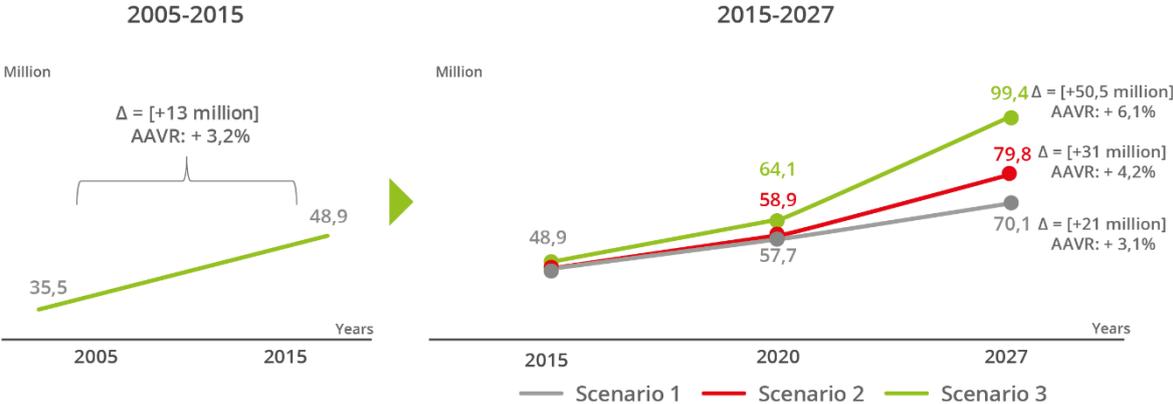
* To be determined in the territories/locations with higher tourism density.



A STRATEGIC GUIDELINE FOR THE DECADE | TARGETS

1. OVERNIGHT STAYS

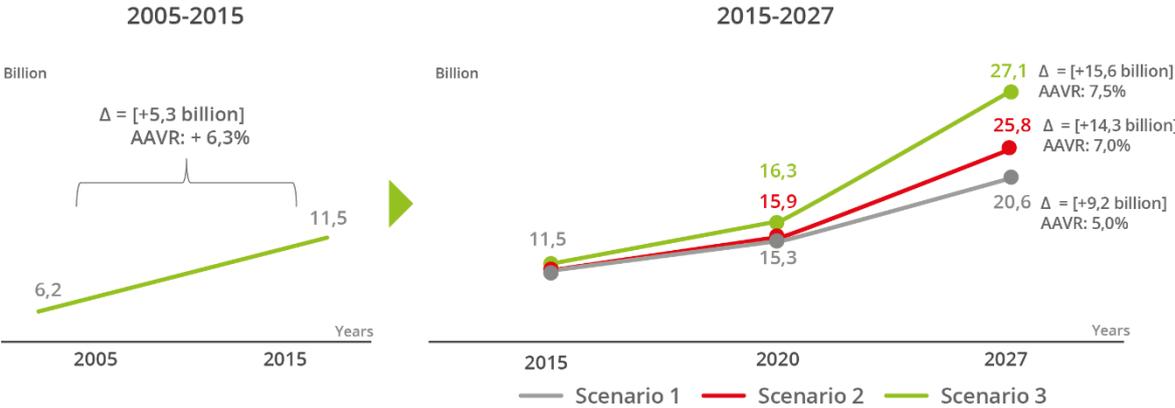
Goal: Increase tourism demand in the country and in the various regions.
Target: 80 million overnight stays | Δ 31 million overnight stays | average annual growth of 4.2%.



Source: INE (2005-2016) and produced in-house.
 Unit: National and foreign overnight stays at hotel establishments, resorts, tourism apartments and other accommodations.

2. REVENUE

Goal: Grow in value and grow more than our main competitors.
Target: €26 billion | Δ €14 billion | average annual growth of 7%.

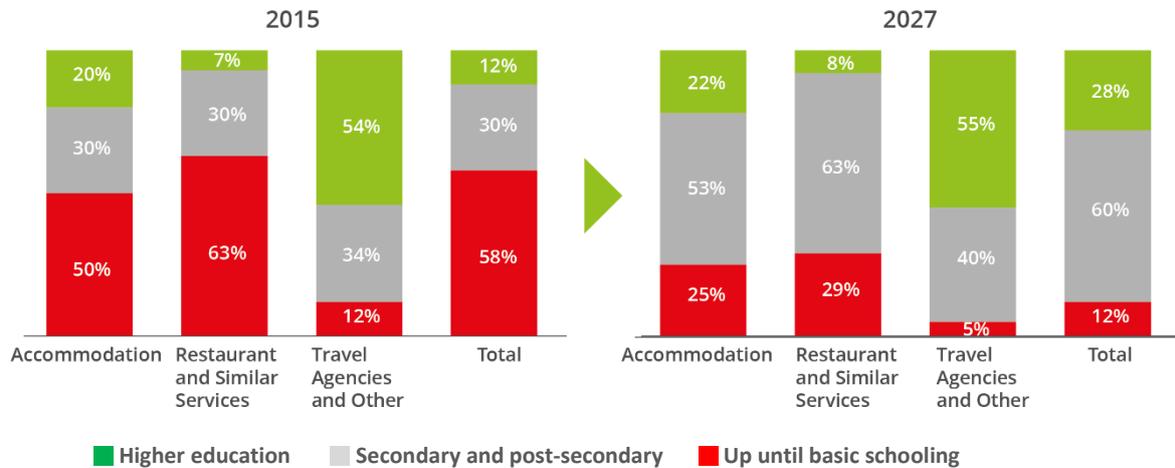


Source: Bank of Portugal (2005-2016) and produced in-house.

3. QUALIFICATIONS

Goal: increase the qualifications of tourism workers.

Target: double number of secondary and post-secondary degrees in tourism – from **30% to 60%**.



Source: INE (2016) and produced in-house

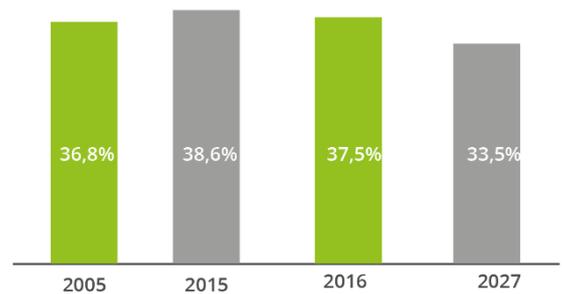
Tourism includes accommodation, restaurants and similar services, travel agencies, tour operators, other reservation services and related activities.

4. TOURISM THROUGHOUT THE ENTIRE YEAR

Goal: broaden tourism to span throughout the entire year.

Target: reduce the **seasonality index from 37.5% to 33.5%**.

In 2027, attain the lowest ever seasonality index in order to achieve greater sustainability in tourism.



5. SATISFACTION OF RESIDENTS

Goal: ensure positive integration of tourism with the resident populations.

Target: **that + than 90% of the resident population** considers that tourism has a positive impact on their territory.

6. ENERGY

Goal: increase the levels of energy efficiency in tourism companies.

Target: **that + than 90% of tourism companies** adopt measures for using energy efficiently.

7. WATER

Goal: encourage rational management of water resources in Tourism.

Target: **that + than 90% of tourism companies** promote efficient usage of water in their operations.





06

HOW DO WE GET THERE? A STRATEGIC GUIDELINE FOR THE DECADE

HOW DO WE GET THERE?

A STRATEGIC GUIDELINE FOR THE DECADE / STRATEGIC ASSETS

*A strategy focused on assets that support the sustainability and competitiveness of destination
PORTUGAL*

| | | |
|-------------------------|-------------------------------|---|
| STRATEGIC ASSETS | DIFFERENTIATING ASSETS | Cornerstone attributes that are the basis and substance of the national tourism offering, with one or more of the following characteristics: 1. Endogenous – reflecting intrinsic and distinctive characteristics of the destination/territory, with international tourism recognition and/or high potential for future development; 2. Non-transferrable – part of a specific destination/territory and cannot be transferred to another location and inimitable; 3. Generating flows – stimulating demand. |
| | QUALIFYING ASSETS | Assets that enrich the tourism experience and/or add value to the tourism offerings of the territory, leveraged by the differentiating assets of the destination. |
| | EMERGING ASSETS | Assets that begin to be recognized internationally and that have a high potential for growth and which in the future may generate high value movements that add to and leverage the multiplier effect of tourism on the economy. |

STRATEGIC ASSETS

SINGLE CROSS-SECTIONAL ASSET

1. PEOPLE

| DIFFERENTIATING ASSETS | QUALIFYING ASSETS | EMERGING ASSETS |
|---|--|--|
| 2. Climate and light 3. History and Culture 4. Sea 5. Nature 6. Water | 7. Food and Wine 8. Artistic-cultural, sporting and business events | 9. Well-Being 10. Living – Living in Portugal |

SINGLE ASSET – CROSS-SECTIONAL

1. PEOPLE

Welcoming people well in Portugal is not just marketing: it is culture, attitude and identity.

It is based on a universalist vocation that stems from a genuine interest in knowing about other cultures, valuing the difference and understanding between other peoples; our will and capacity to value human relations, expressed in the way in which we relate to other people and which is consistently recognized by the people who visit us. People are therefore a unique cross-sectional asset that is particularly important to tourism – an activity of people for people.

As stated by UNTO Secretary General Taleb Rifai in: February 2017, “The best of Portugal are the Portuguese.”

DIFFERENTIATING ASSETS

2. CLIMATE AND LIGHT

Temperate Mediterranean climate, mild, sunny and intense light during most of the year (on average 259 days/year).

3. HISTORY AND CULTURE

Over 900 years of history; cultural and religious heritage; material and non-material world heritage recognized by UNESCO throughout the entire country; legacy of traditions, legends, usages and customs; contemporary architecture and culture (led by people who are well known in music and sports).

4. SEA

Excellent coastline with potential for surfing – world renowned – and other nautical sports and activities; vast marine biodiversity; natural conditions and infrastructures for hosting cruise ships. The sun and sea combination offers beaches (579) and marinas, recreational ports and docks in Portugal (52) of renowned quality.

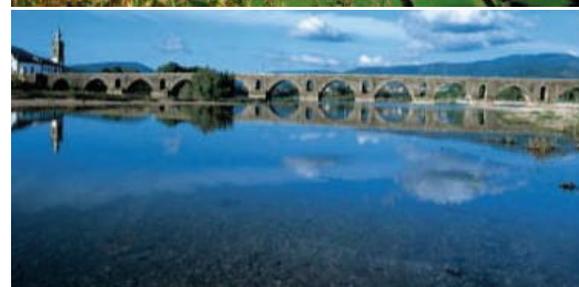
5. NATURE

Vast and rich natural heritage; unique fauna and flora consisting of unique native species; some 23% of the national territory has been included in the Natura 2000 Network, which makes Portugal one of the most ambitious countries in protecting biodiversity and nature.

6. WATER

Rivers, lakes, reservoirs and hot springs of renowned environmental quality.

Numerous fluvial beaches throughout the country (115). Water is at the heart of unique assets located mostly in the interior of the country and with tourism potential (e.g. Alqueva, the largest artificial lake in Europe, the Douro River, the Azibo Reservoir, the Serra da Estrela Lagoons, Portas de Ródão).



QUALIFYING ASSETS

7. FOOD AND WINE

Traditional cuisine is present throughout the country. Portugal is among the countries with the best fish in the world and has internationally renowned chefs and various restaurants with Michelin stars.

The awards that Portuguese wines have received have recognized Portugal as one of the best wine producing countries in the world and wine can serve as a calling card to leverage Enotourism.

8. ARTISTIC-CULTURAL, SPORTING AND BUSINESS EVENTS

Network of artistic-cultural, musical, sporting and business events that reach various audiences, across the entire country, namely in territories where demand is lower.

Portugal offers events that have already demonstrated an unequivocal contribution to its international profile and which in some cases help to invigorate local economies in low density territories, helping to make sure that tourism can exist throughout the entire year and across the entire territory.



EMERGING ASSETS

9. WELL-BEING

Combines healthy living, health, well-being, mindfulness and sporting and nature activities. This also includes health care and well-being treatments received at hot springs and specialized centres, whose growth is based on the relative quality of hospital infrastructures, on the quality/price ratio, on international recognition of the Portuguese National Health Service, and on the country's high ranking in important health care indicators.

10. LIVING – Living in Portugal

More and more people seek out Portugal to live due to its quality of life, as seen its climate, cuisine, security, proximity, and quality/price ratio. There has been noticeable growing demand from investors, citizens from other countries, foreign students and researchers who choose Portugal to live, creating a multi-cultural environment and an enterprising ecosystem capable of generating movements of high added value.



PILLARS AND LINES OF ACTION



LINES OF ACTION

| | |
|--|---|
| ADD VALUE TO THE TERRITORY | Preserve, add value to and use historic-cultural heritage |
| | Value and preserve Portugal's authenticity |
| | Establish the place of tourism in the economy of the sea |
| | Economically leverage natural and rural heritage and ensure its conservation |
| | Promote urban regeneration of the cities, regions and sustainable tourism development of the territories/destinations |
| Structure and promote offerings that meet tourism demand | |
| DRIVE THE ECONOMY | Ensure the competitiveness of tourism companies from a short, medium and long term perspective. |
| | Reduce contextual costs, simplify, offer legal and taxation stability and eliminate bureaucracy |
| | Attract investment and qualify tourism offerings |
| | Stimulate the circular economy in tourism |
| | Establish Portugal as an international point of reference for innovation, entrepreneurship and production of goods and services for tourism |
| LEVERAGE KNOWLEDGE | Add value to the tourism professions and train human resources that respond to market needs |
| | Ensure the transfer of knowledge from educational institutions and research centres to businesses |
| | Disseminate knowledge and statistical information |
| | Ongoing training of entrepreneurs and managers, in order to lead the tourism of the future – technological, inclusive and sustainable |
| | Establish Portugal as a <i>smart destination</i> |
| GENERATE NETWORKS AND CONNECTIVITY | Extend and increase the number of year-long flight routes and attract homeport and turnaround operations for cruise ships |
| | Improve road-rail mobility and navigation systems |
| | Promote "tourism for all," from an inclusive point of view, incorporating the various tourism markets/segments |
| | Actively involve society in the process of tourism development in the country as a whole and in the regions in particular |
| | Mobilize networking and joint promotion between the various sectors |
| RAISE PORTUGAL'S PROFILE | Raise Portugal's international profile as a tourism destination for visiting, investing in, living in and studying in |
| | Position internal tourism as a competitiveness factor for leveraging the national economy |
| | Promote "tourism for all," from an inclusive point of view, incorporating the various tourism markets/segments |
| | Make Portugal an international destination for conventions and cultural and sporting events |
| | Establish Portugal's place in international organizations and in international cooperation |

STRATEGIC SUMMARY

| | |
|--------|--|
| VISION | ESTABLISH TOURISM AS A HUB FOR ECONOMIC, SOCIAL AND ENVIRONMENTAL DEVELOPMENT THROUGHOUT THE TERRITORY, POSITIONING PORTUGAL AS ONE OF THE MOST COMPETITIVE AND SUSTAINABLE TOURISM DESTINATIONS IN THE WORLD |
|--------|--|

| Strategic Goals | ADD VALUE TO THE TERRITORY | DRIVE THE ECONOMY | LEVERAGE KNOWLEDGE | GENERATE NETWORKS AND CONNECTIVITY | RAISE PORTUGAL'S PROFILE |
|--------------------------|--|---|--|---|---|
| Lines of action | Preserve, add value to and use historic-cultural heritage | Ensure the competitiveness of tourism companies from a short, medium and long term perspective | Add value to the tourism professions and train human resources that respond to market needs | Extend and increase the number of year-long flight routes and attract homeport and turnaround operations for cruise ships | Raise Portugal's international profile as a tourism destination for visiting, investing in, living in and studying in |
| | Value and preserve Portugal's authenticity | Reduce contextual costs, simplify, offer legal and taxation stability and eliminate bureaucracy | Ensure the transfer of knowledge from educational institutions and research centres to businesses | Improve road-rail mobility and navigation systems | Position internal tourism as a competitiveness factor for leveraging the national economy |
| | Establish tourism in the economy of the sea | Attract investment and qualify tourism offerings | Disseminate knowledge and statistical information | Promote "tourism for all," from an inclusive point of view, incorporating the various tourism markets/segments | Make Portugal an international destination for conventions and cultural and sporting events |
| | Economically leverage natural and rural heritage and ensure its conservation | Stimulate the circular economy in tourism | Ongoing training of entrepreneurs and managers in order to lead the tourism of the future – technological, inclusive and sustainable | Actively involve society in the process of tourism development in the country as a whole and in the regions in particular | Establish Portugal's place in international organizations and in international cooperation |
| | Promote regeneration of cities regions and sustainable tourism development of the territories/destinations | Establish Portugal as an international point of reference for innovation, entrepreneurship and production of goods and services for tourism | Establish Portugal as a smart destination | Mobilize networking and joint promotion between the various sectors | |
| | Structure and promote offerings that meet tourism demand | | | | |
| Implementation 2017-2020 | TYPES OF PRIORITY PROJECTS | | | | |



07

IMPLEMENTATION

2017-2020

IMPLEMENTATION 2017-2020

TYPES OF PRIORITY PROJECTS

Tourism Strategy 2027 is based on a combination of a long term vision with action in the present. It is based on strategic and structural thinking regarding tourism over a 10 year period, while also committed to action in the present with 2020 on the horizon.

The present chapter – implementation 2017-2020 – lists the types of priority projects for developing tourism in the country as a whole and in the regions in particular, thereby fulfilling its role as the short/medium term strategic guideline for Tourism Strategy 2027. These types bring to life the strategic options of Tourism Strategy 2027 in a more concrete manner.

Execution and realization of Tourism Strategy 2027 involves implementation of projects based on the lines of action of its 5 strategic pillars that together help reach the targets and ambitions of Tourism Strategy 2027, establishing tourism as a hub for economic, social and environmental development throughout the territory, positioning Portugal as one of the most competitive and sustainable tourism destinations in the world.



| PILLARS | ADD VALUE TO THE TERRITORY | DRIVE THE ECONOMY | LEVERAGE KNOWLEDGE | GENERATE NETWORKS AND CONNECTIVITY | RAISE PORTUGAL'S PROFILE |
|--|--|-------------------|-----------------------------------|------------------------------------|--------------------------|
| ADD VALUE TO THE TERRITORY | LINES OF ACTION | | TYPES OF PRIORITY PROJECTS | | |
| | Preserve, add value to and use historic-cultural heritage | | | | |
| | Projects that conserve and add economic value to constructed heritage that has a recognized historical-cultural value, making it accessible and open to providing services that are of public-tourist interest, namely as part of the "Revive" program. | | | | |
| | Produce and make available content and info-promotional materials, including those of a technological nature, regarding historical-cultural heritage. | | | | |
| | Development of digital platforms and technological applications that allow the tourism experience to be enriched in the territories and in their heritage assets. | | | | |
| | Creation of usage programs for public heritage, turning it into tourism assets. | | | | |
| | Actions that add value to endogenous regional projects, namely with regard to strategic assets of Food and Wine. | | | | |
| | Value and preserve Portugal's authenticity | | | | |
| | Initiatives that value and activate Portuguese non-material cultural heritage for tourism purposes. | | | | |
| | Invigoration of traditional commerce and its "historic shops," promoting Portugal's identity and authenticity. | | | | |
| | Valuing and promoting informed consumption through an active brand that identifies national production – "I am Portugal." | | | | |
| | Establish the place of tourism in the economy of the sea | | | | |
| | Strengthen Portugal's position as leading international destination for surfing, nautical, sporting and leisure activities associated with the sea along the entire coast. | | | | |
| | Invigorate and add value to infrastructure, equipment and services that support nautical tourism, namely ports, marinas and nautical centres. | | | | |
| | Nautical activities that use the sea, linked to diving, sailing, canoeing, watching dolphins and whales, fishing, seafaring tours and beach activities that incorporate sustainability into the sea's nautical culture. | | | | |
| | Invigoration of the "experiences routes" and tourism offerings focused on the sea and nautical activities. | | | | |
| | Actions that add value to the coast, including restoration of the shorelines and improvement of beaches. | | | | |
| | Health and well-being tourism projects associated with the therapeutic properties of the sea. | | | | |
| | Valuing of sea products associated with the Mediterranean diet. | | | | |
| | Economically leverage natural and rural heritage and ensure its conservation | | | | |
| | Development of nature tourism and tourism in rural areas via projects that add economic value and active management of natural and rural heritage, which includes the national network of protected areas, biosphere reserves and Geoparks recognized by UNESCO, namely with regard to promoting the Natural.PT brand. | | | | |
| | Infrastructure and services that support nature tourism and/or tourism in rural areas, signing and interpretation information for environmental tourism. | | | | |
| | Operations that revitalize and invigorate the economy of villages and rural centres with a vocation for tourism, especially focused on thematic networks and/or resources that are endogenous to the territories, such as Shale Villages, Historic Villages and Wine-Growing Villages. | | | | |
| | Actions that improve tourism and promote lakes and inland waters, rivers, reservoirs, springs and hot springs resorts. | | | | |
| | Promote regeneration of cities and regions and sustainable tourism development of territories/destinations | | | | |
| | Implementation of an internationally renowned system of sustainability indicators throughout the entire national territory for the purpose of sustainable management of destinations in partnership with the World Tourism Organization. | | | | |
| | Operations aimed at urban regeneration of historic/urban centres, preservation of authenticity, and promotion of tourism that is accessible in the cities, involving: <ul style="list-style-type: none"> • urban restoration and renovation of edifices; • improvement of the public space and elimination of physical barriers; • refurbishing for tourism purposes, collective equipment and infrastructures that are not in use and/or deteriorating; • promotion of sustainable mobility in view of improving conditions for visiting and using cities; • promotion of traditional commerce and historic shops. | | | | |
| | Drafting/implementation of tourism development strategies for tourism destinations of a regional/sub-regional/local scope, taking into account the sustainability and competitiveness of the territories. | | | | |
| | Structure and promote offerings that meet tourism demand | | | | |
| | Actions that structure tourism offerings focusing on thematic routes/itineraries with a strong vocation for historic-cultural and/or natural tourism, based on national strategic tourism assets, especially through implementation of the following projects: <ul style="list-style-type: none"> - Portuguese Trails (extend the Cycling and Walking pilot project of the Algarve region to the entire country); - Way to Fátima; - St. James' Way. | | | | |
| Initiatives for restructuring products adjusted to different demand segments (including specific products for families, seniors/smart age, young people, surfing, equestrian tourism). | | | | | |

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| DRIVE THE ECONOMY | Ensure the competitiveness of tourism companies from a short, medium and long term perspective. |
| | <p>Actions aimed at capitalizing companies, as part of the Capitalize Program, namely:</p> <ul style="list-style-type: none"> • dynamic implementation of financial innovation instruments in tourism, such as venture capital funds and other financial instruments specific to tourism; • diversification of financing sources for tourism, namely equity crowdfunding and peer-to-peer; • invigoration of financing solutions for companies; • availability of information gathered regarding SME financing and capitalization solutions. |
| | Extension of repayment deadlines for financing that has been obtained. |
| | Programs for financing tourism projects in cooperation with Turismo de Portugal, I.P., the banks and the mutual guarantee system – bank protocols. |
| | Incentive systems and financing lines for increasing competitiveness and internationalizing tourism companies, namely with regard to renovation and innovation in tourism offerings – accommodation, restaurant services, entertainment and tourism services – focusing on differentiation, orientation toward demand, accessible tourism, energy efficiency, environmental certification, adoption of international quality standards and response to new dynamics of supply and demand. |
| | Reduce contextual costs, simplify, offer legal and taxation stability and eliminate bureaucracy |
| | Initiatives that seek to reduce corporate costs related to (i) licensing processes, (ii) certification, (iii) access to financing and other processes related to development of tourism activities. |
| | Proactive and ongoing support actions for companies, involving activities that promote increasing the qualifications of companies – business models, knowledge about demand, mentoring, internationalization – and initiatives that permit simple and objective communication by public administration in relation to companies in various areas, such as licensing and financing. |
| | Attract investment and qualify tourism offerings |
| | Operations for actively attracting direct foreign investment, involving actions in foreign markets, such as road shows, corporate missions, dossiers and market prospection instruments for attracting investment. |
| | Actions that support and help investors and entrepreneurs – provide complete information that is accessible, with interfaces that permit ongoing effective and interactive communication – including creating an investor platform. |
| | Adaptation of tourism legislation to new realities. |
| | Stimulate the circular economy in tourism |
| | Create standards for sustainability of tourism in Portugal with regard to economic, environmental and social aspects, and governance, allowing for circular flows of re-usage, restoration and renovation, in an integrated manner. |
| | Initiatives for promoting sustainability of destinations and tourism stakeholders, along with communication and inclusion of non-financial variables (environmental, social and governance) in tourism investment projects. |
| | Projects that stimulate energy efficiency in the tourism value chain and integration of the circular economy in the value chain, namely in terms of reducing, re-using, restoring and recycling materials and energy. |
| | Inclusion of a sustainability dimension as a valuating element in the classification system for tourism establishments. |
| | Establish Portugal as an international point of reference for innovation, entrepreneurship and production of goods and services for tourism |
| | Projects that encourage development and growth of start-ups and activities related to innovation entrepreneurship in tourism. |
| | Actions that support creation of new businesses that foster creativity, technology and know-how, especially in terms of smart specialization areas. |
| | Actions that promote synergies between the creative industries and tourism, raising the profile of destination Portugal and improving the tourism experience. |
| | Establishment and invigoration of clusters and networks of producers of goods and services for the tourism industry. |
| | Promotion and internationalization of Portugal as a leading country in the supply of goods and services for the tourism industry. |
| Initiatives of tourism interaction with traditional production sectors, allowing them to grow in scale and leverage Portugal's comparative advantages. | |
| Programs to digitalize tourism companies in order to increase competitiveness. | |
| <p>Initiatives that invigorate entrepreneurship, including the following components:</p> <ul style="list-style-type: none"> • Incubation and acceleration of companies; • National Tourism Incubators Network; • Support in internationalizing companies – participation in international fairs; • Tourism Entrepreneurship Program for students of the Hotel and Tourism Schools. | |

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| LEVERAGE KNOWLEDGE | Add value to the tourism professions and train human resources that respond to market needs | |
| | Two-year program taking inventory of tourism training needs, involving different partners, namely educational institutions, associations and corporate entities. | |
| | Courses, training and qualifications actions for increasing the qualification of human resources in tourism, adapted to demand and in areas that respond to companies' needs. | |
| | Actions pertaining to recognition, validation and certification of the skills of professionals in the tourism field. | |
| | Projects for creating self-employment and actions for reconverting skills for use in tourism for people who are unemployed. | |
| | Initiatives that promote and add value to tourism professions. | |
| | Invigoration of Turismo de Portugal Hotel and Tourism Schools as specialized tourism training and entrepreneurship centres with an international vocation. | |
| | Inclusion of the qualified Human Resources dimension as an element that adds value to the tourism establishment classification system. | |
| | Ensure the transfer of knowledge from educational institutions and research centres to businesses | |
| | Projects of applied research into tourism that promote the transfer of knowledge to companies with the aim of adding economic value to knowledge. | |
| | <i>Open Kitchen Labs</i> – opening of Hotel and Tourism Schools to companies and start-ups for testing products and fostering creativity and innovation in cooking and restaurant services. | |
| | Invigoration of an ecosystem for ongoing innovation in tourism of international renown, which incorporates the creation of a Tourism Innovation Centre in partnership with Turismo de Portugal, associative structures, companies, entrepreneurial ecosystem entities and creative industries and technological partners. | |
| | Disseminate knowledge and statistical information | |
| | Supply systemized statistical information and/or management and supply of knowledge regarding the tourism activity for the various tourism stakeholders, including: <ul style="list-style-type: none"> • implementation of the Tourism Satellite Account; • collection of statistical information that is pertinent and updated based on key indicators for the tourism stakeholders; • implementation of the platform/management mechanisms and supplying information to the tourism stakeholders; • provide georeferenced information on the WEB regarding national tourism. | |
| | Supply updated online information regarding demand and issuer markets. | |
| | Ongoing training of entrepreneurs and managers, in order to lead the tourism of the future – technological, inclusive and sustainable | |
| | Projects for developing strategic capacities and competitive management of SMEs, including adapting to new business models, access to international markets and to the digital economy. | |
| | Projects that increase the qualifications of the tourism offering for specific tourism segments/markets. | |
| | Establish Portugal as a smart destination | |
| | Technology, knowledge and information projects that allow for integrated and smart management of regional destinations and of destination Portugal. | |
| | Programs for “digitalizing” tourism offerings. | |
| | Technological solutions for the supply of tourism offerings and for tourism companies, increasing their competitiveness and adapting to the demand trends and to the profiles of new tourists, helping to improve the tourism experience of visitors. | |
| | Supply of free Wi-Fi throughout the country, in order to improve the tourism experience in Portugal. | |
| | Implementation of an open data project for tourism. | |
| | GENERATE NETWORKS AND CONNECTIVITY | Extend and increase the number of year-long flight routes and attract homeport and turnaround operations for cruise ships |
| | | Increase in Portugal's air travel competitiveness as a tourism destination, namely its airport infrastructure. |
| | | VIP.pt program – promotion and attraction of flight routes for tourism operations. |
| Promotion and attraction of cruise ship routes and tourism operations. | | |
| Increase of competitiveness and attractiveness of cruise ship ports. | | |
| Improve road-rail mobility and navigation systems | | |
| Qualification of pillars of tourism interest related to road or rail travel and which add value to the tourism offering. | | |
| Ensure good road mobility conditions at the tourism destinations, especially those that record the most traffic and tourism intensity. | | |
| Implementation of tourism signing projects. | | |
| Projects improving fluvial navigation, including improvement of river docks and creating docking platforms for recreational vessels and other infrastructures and services that support tourism in the inland rivers and waters of Portugal. | | |
| Actions that promote inter-modality and interoperability between different transport services. | | |
| Development of projects that promote sustainable mobility at the tourism destinations, namely soft mobility. | | |

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| | Implementation of the Algarve-Electric Mobility pilot project and later expansion to other regions. |
| | Promote “tourism for all,” from an inclusive point of view, incorporating the various tourism markets/segments |
| | Actions that create awareness and attract tourism companies and organizations regarding “tourism for all.” |
| | Projects that promote accessibility and use of the tourism offerings, namely operations involving the adaptation and improvement of infrastructures, equipment and human resources. |
| | Actively involve society in the process of tourism development in the country as a whole and in the regions in particular |
| | Initiatives for society’s participation in processes of co-creation of projects/initiatives for development of tourism in Portugal. |
| | Projects that involve the resident population/local communities in initiatives relating to welcoming visitors and their well-being. |
| | Implementation of participatory budgets for Tourism, including in the Hotel and Tourism Schools. |
| | Development of studies monitoring the impact of tourism activity. |
| | Mobilize networking and joint promotion between the various sectors |
| | Clustering initiatives for collaborative networks and consortiums that contribute to establishing national strategic assets and/or which help to strengthen competitiveness and internationalization of Destination Portugal, namely implementation of competitiveness clusters for the national economy meriting recognition, including Tourism Cluster 2020. |
| | Cross-border and trans-national cooperation involving strengthened cooperation relations between Portugal and Spain and active participation of Portugal and its territories in international networks. |
| RAISE PORTUGAL’S PROFILE | Raise Portugal’s international profile as a tourism destination for visiting, investing in, living in and studying in |
| | Promotion actions in international markets, taking into account the specifics of each market, establishing Portugal as a country for visiting, investing in, living in and studying in. |
| | Development of cross-selling partnerships between tourism and other sectors/clusters of the Portuguese economy, allowing for cross-participation in events of different economic activities, maximizing synergies and attracting direct foreign investment. |
| | Invigoration of actions that allow leveraging of the merit and international recognition of Portugal and the Portuguese, in order to raise the international profile of Portugal. |
| | Joining of the digital platforms for promoting destination Portugal via an integrated digital platform of the regional and national destinations, offering integrated and coherent communication regarding the destination-image, complementing technology and content. |
| | Projects for internationalizing territories and thematic clusters that provide synergies and gains of scale that increase Portugal’s international vocation as a tourism destination. |
| | Actions that promote use of digital tools in promoting, communicating and structuring offerings, satisfying supply/marketing needs that are increasingly more customized. |
| | Projects that foster internationalization of tourism companies, namely through prospection actions and access to new markets, participating in international fairs and initiatives for promoting and marketing new external markets. |
| | Actions that establish Portugal as an international destination for film production. |
| | Invigoration of a network of Portuguese restaurants throughout the world. |
| | Leveraging the presence of Portuguese emigrants around the world in promoting the destination and in attracting investment. |
| | Position internal tourism as a competitiveness factor for leveraging the national economy |
| | Projects that contribute to the invigoration of internal tourism throughout the year, involving specific promotion actions and national campaigns, namely through the creation and development of innovative content and involvement of the Portuguese people. |
| | Events that help promote tourism of territories, add value to local economies, their endogenous products and their stories and traditions. |
| | Make Portugal an international destination for conventions and cultural and sporting events |
| | Actions directed at attracting, holding, supporting and providing specialized monitoring of conventions and international events, including: <ul style="list-style-type: none"> • creation of a specialized team; • invigoration of a support fund to help attract conventions and international events; • creation of a meetings and incentives platforms that brings together relevant national information regarding events in Portugal; • execution of specific promotional actions for this segment. |
| | Operations for creating/strengthening infrastructure and services that welcome large international events, along with their promotion. |
| | Establish Portugal’s place in international organizations and in international cooperation |
| | Activities that strengthen and maintain Portugal’s position in international organizations, establishing a dynamic presence among the main topics of the international tourism agenda. |
| | Initiatives that contribute to establishing Portugal’s position in international cooperation, including participation in joint projects for exchanging knowledge and experiences with other countries and international organizations. |

PRIORITY EXTERNAL MARKETS

Priority markets for promoting and marketing Portuguese tourism offerings were identified on the basis of external demand and the response capacity of national supply in light of such demand, and they can be divided into four distinct groups.

STRATEGIC MARKETS

Markets with very relevant historic behaviours with respect to market share and growth rate. They must be subject to individual and detailed strategy, taking into account regional realities in each market and the distinct segments of tourists that make up these markets.

EMERGING MARKETS

Large tourist issuer markets that show clear growth potential for Portugal.

GROWING MARKETS

Although their relative importance is still low, these markets are present in the national tourism market and exhibit growth potential, and can contribute to diversifying tourism demand in Portugal.

SELECTIVE ACTION MARKETS

Markets that because of their distance and dimension have difficulty in attaining critical mass, but still offer opportunities or markets where long term growth is expected and which deserve attention. These are markets that may be the object of promotional actions focused on offerings or specific demand segments, as long as they are strategically reasoned and justified. Accordingly, the potential demand existing in these markets and opportunities that are detected must be taken into consideration.

STRATEGIC MARKETS

SPAIN

Priority market due to its proximity, growth (AAVR 10/15: +1.6%) and high market share (10.6%); there will be an effort to segment the distinct regional realities and efforts to develop specific offerings, seeking to reduce the seasonality of demand.

GERMANY

Market undergoing recovery (AAVR 10/15: 5.7%) and high market share (14.0%); Increase in the demand of the distinct regions and segments and creation of an offering directed at these distinct demands, while also creating mechanisms that help create loyalty among the new visitors.

UNITED KINGDOM

Market subject to a specific approach (AAVR 10/15: +6%), maintaining market share (24.0%); leveraging the fact that Portugal is very well known as a tourism destination and the U. K. market's affinity for Portugal.

FRANCE

Market where efforts will continue to increase market share (9.7%), leveraging this market's particular appetite for Portugal (AAVR 10/15: +11%).

BRAZIL

Market with potential growth (AAVR 10/15: +6.8%), strong position in the market (13.6%), easy access by air, high average spending and low seasonality: subject to promotion seeking to guarantee greater penetration in terms of tourist flows to Europe.

NETHERLANDS

Market with some tourism dimension (AAVR 10/15: 2.2%) with affinity for Portugal as a tourism destination. The goal should be to increase market share (6.2%).

IRELAND

Although it is a small market, there is a strong affinity with Portugal and as such an effort should be made to explore this relationship in order to leverage the notoriety of the destination, in order to be able to grow, especially during the low season (3.6% market share).

SCANDINAVIA

Markets where it is important to try to reverse the drop seen in the past years.

We have to adapt the national offering to the demands of the market, consolidating accessibility by air and distribution, taking advantage of this market's contribution to reducing the seasonality of demand and its high average spending. Market share of 4.8% in 2015.

EMERGING MARKETS

UNITED STATES OF AMERICA, CHINA AND INDIA

These are large tourist issuer markets that show enormous potential for growth in Portugal. Increased flight connections between Portugal and the USA and a new direct weekly flight to China have helped create a more favourable context for increasing influxes from these countries.

GROWING MARKETS

ITALY, BELGIUM, SWITZERLAND AND AUSTRIA

Markets that have growth potential and where we should act to achieve absolute growth of overnight stay and revenues.

POLAND, RUSSIA AND CANADA

Take advantage of the size of these markets to grow in absolute terms with regard to overnight stays. In the case of Poland, leverage the fact that Portugal is well known in the market and the population's affinity with Portugal. Russia requires some effort in increasing the notoriety of the destination, requiring more systematic action subsequent to the current political-social context.

SELECTIVE ACTION MARKETS

JAPAN, AUSTRALIA, SINGAPORE, SOUTH KOREA, ISRAEL AND ARABIAN PENINSULA COUNTRIES

Although for different reasons, these markets require exploring opportunities to act in specific demand segments.

Because tourism demand is dynamic, evolving and influenced by various factors, the aforementioned markets may be revised/adjusted, namely with respect to the national tourism marketing plan and annually planned activities for external tourism promotion of Portugal and its regions.



08

MONITORING AND MANAGEMENT MODEL

MONITORING AND MANAGEMENT MODEL

MONITORING, IMPLEMENTATION AND MANAGEMENT MODEL OF TOURISM STRATEGY 2027

| TURISMO DE PORTUGAL MANAGEMENT ENTITY | STRATEGIC TOURISM LABORATORIES (STL) | NATIONAL TOURISM FORUM |
|--|---|------------------------|
| JOINT ACTION | MOBILIZE | COOPERATE |

| | |
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| TURISMO DE PORTUGAL MANAGEMENT ENTITY | <p>Turismo de Portugal as the National Tourism Authority is responsible for:</p> <ul style="list-style-type: none"> • coordinating and invigorating Tourism Strategy 2027 and promoting its implementation; • ensure coherence between tourism investments and community financing instruments; • mobilize stakeholders and monitor the strategy. |
| STRATEGIC TOURISM LABORATORIES (STL) | <p>These are ongoing consultation platforms for the territories and markets for implementing projects and measures for Tourism Strategy 2027. These active cooperation and collaboration platforms shall also be spaces for discussing topics proposed by the partners, seeking to:</p> <ul style="list-style-type: none"> • create conditions for improving territorialization of the national Tourism policy; • debate key topics regarding crucial sectors and sub-sectors for Tourism and generate knowledge in critical areas; • get to know dynamics, motivations and international demand trends. <p>The STL shall take place in different regions of the country, in order to take into account the specifics of each territory.</p> <p>The STL that take place on national territory shall consist of entities related to tourism and regional development, the National Technological Scientific System and the corporate sector.</p> <p>STL shall also be held in external markets (where tour operators, travel agents, and opinion leaders in the particular market will be heard), taking into account international dynamics and their implications with respect to monitoring and implementing Tourism Strategy 2027. These STL will take place in at least 3 external markets per year.</p> |
| NATIONAL TOURISM FORUM | <p>Space for:</p> <ul style="list-style-type: none"> • discussion and debate regarding tourism in the country as a whole and in its regions in particular; • sharing of good practices (projects and initiatives) related to the strategic priorities; • report on the degree of implementation of Tourism Strategy 2027; • formulation of recommendations for short/medium term action. |

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