SUPPORTING THE IMPLEMENTATION OF NATIONAL TOURISM POLICY OBJECTIVES THROUGH OBSERVATORIES

UNWTO INSTO MEETING
22.Oct.2019
“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”
Tourism 2027

Sustainable Growth

Overnight stays in the territory

- 2015: 48.9 million
- 2020: 58.9 million
- 2027: 79.8 million

Goal 2027: 80 million

Tourism Receipts

- 2015: 11.5 billion
- 2020: 15.9 billion
- 2027: 25.8 billion

Goal 2027: 26 billion
TOURISM 2027
SUSTAINABLE GROWTH

Skills

High Education
- [2015]: 12%
- [2027]: 28%

Secondary
- [2015]: 30%
- [2027]: 60%

Primary
- [2015]: 58%
- [2027]: 12%

Tourism All Year
Goal 2027
Reduce Seasonality from 37.5% to 33.5%

Locals Satisfaction
Goal 2027
+ 90% of locals consider positive the impacts of tourism
TOURISM 2027
SUSTAINABLE GROWTH

Goal 2027 + 90% of tourism companies develop energy efficiency measures

Goal 2027 + 90% of tourism companies develop water efficiency measures

Goal 2027 + 90% of tourism companies develop waste management measures
You can’t manage what you can’t measure

Edward Deming
KNOWLEDGE STRATEGY

TURISMO DE PORTUGAL: A DATA HUB

- SEF
- ANA
- INE
- Banco Portugal
- Online Surveys
- RNT
- OECD
- ETC
- CET
- Sustainability Indicators
- TURISMO DE PORTUGAL
- UNWTO
- INFORMA
- SIBS
- GlobalData
- ForwardKeys
- Euromonitor International

Power BI
Qlik
SQL

SUPPORTING TOURISM INDUSTRY DECISIONS
SUSTAINABILITY INDICATORS
SUPPORTING THE STRATEGY

ECONOMIC
- Bednights by month
- % of jobs in tourism that are seasonal
- % of establishments open all year
- Employ./ Total Economy
- Employment by gender
- % GDP
- Daily spending of tourists
- Daily spending per overnight tourist
- Number of same-day visitors
- Number of tourists
- Average length of stay of tourists
- Average spend of same-day visitors
- % establishments using local products

SEASONALITY

TO INFORM DESTINATION MANAGEMENT
SUSTAINABILITY INDICATORS
SUPPORTING THE STRATEGY

SOCIAL

TOURIST SATISFACTION

LOCAL SATISFACTION

PRESSURE

ACCESSIBILITY

% tourists satisfied
% of return visitors
% residents satisfied with the impacts of tourism
% residents satisfied with tourism in the destination
Number of tourists per 100 residents
Tourism Intensity
Tourism density
Occupation rate
% of rooms accessible for people with disabilities

TO INFORM DESTINATION MANAGEMENT

TURISMO DE PORTUGAL
SUSTAINABILITY INDICATORS

SUPPORTING THE STRATEGY

**ENVIRONMENTAL**

- Blue Flag Beaches
- % tourists using different means of transport
- Carbon footprint
- % excellent or good water quality
- % establishments provide environmental training to employees

**ENERGY MANAGEMENT**

- % establishments with low consumption systems
- Expenses with environment
- % establishments with certifications
- Direct energy consumption
- Emissions (direct energy)
- Emissions (electricity consumption)

**SOLID WASTE MANAGEMENT**

- % establishments separating different types of waste
- % solid waste attributed to tourism
- % establishments taking actions to reduce water consumption
- % use recycled water
- Top 5 measures taken to reduce water consumption
- % of controlled and good quality water

**WATER MANAGEMENT**

- Top 5 energy saving measures
- % establishments with energy reduction goals

**TO INFORM DESTINATION MANAGEMENT**
SUSTAINABILITY INDICATORS
SUPPORTING THE STRATEGY

- Statistics Portugal
- Eurostat
- Portuguese Environmental Agency
- Directorate General for Energy and Geology
- Turismo de Portugal’s survey on best environmental practices
- National Tourism Registries
# SUSTAINABILITY INDICATORS

**Better Data. Better Decisions.**
Find the latest statistics, market analysis and trends of the tourism activity.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Jan-Jun 2019</th>
<th>Jan-Jun 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Stays</td>
<td>4.7%</td>
<td>Up</td>
</tr>
<tr>
<td>Guests</td>
<td>7.6%</td>
<td>Up</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>7.6%</td>
<td>Up</td>
</tr>
<tr>
<td>Tourism Receipts</td>
<td>6.5%</td>
<td>Up</td>
</tr>
<tr>
<td>%Global Exports</td>
<td>16.4%</td>
<td>Up</td>
</tr>
<tr>
<td>%Service Exports</td>
<td>49.0%</td>
<td>Up</td>
</tr>
<tr>
<td>%GDP</td>
<td>13.7%</td>
<td>Up</td>
</tr>
<tr>
<td>%Total Employment</td>
<td>9.4%</td>
<td>Up</td>
</tr>
</tbody>
</table>
Decision making: from national to local level
Empower Destinations!
A NETWORK OF OBSERVATORIES

PRINCIPLES

- To connect national and regional/local policies
- Regional DMO’s approach (NUTS II) to support regional policy
- Desired process
- Common set of indicators + specific indicators for each region
- Using existing and comparable data
- Designing benchmarks
- Translating sustainable tourism indicators into action
A NETWORK OF OBSERVATORIES
A ROADMAP

TOWARDS A BETTER DESTINATION MANAGEMENT
FINAL REMARKS

CHALLENGES

- Integration into the decision-making process
- Data availability
- Data comparability
- Integration of new sources of data (mobile, geodata)
- Financing
- Analytic skills
Leading the tourism of the future!

Thank You!

sergio.guerreiro@turismodeportugal.pt