



# TRENDS & FUTURE AHEAD FOR THE TOURISM INDUSTRY

Estoril – 2021 | 09 | 29



# 1.

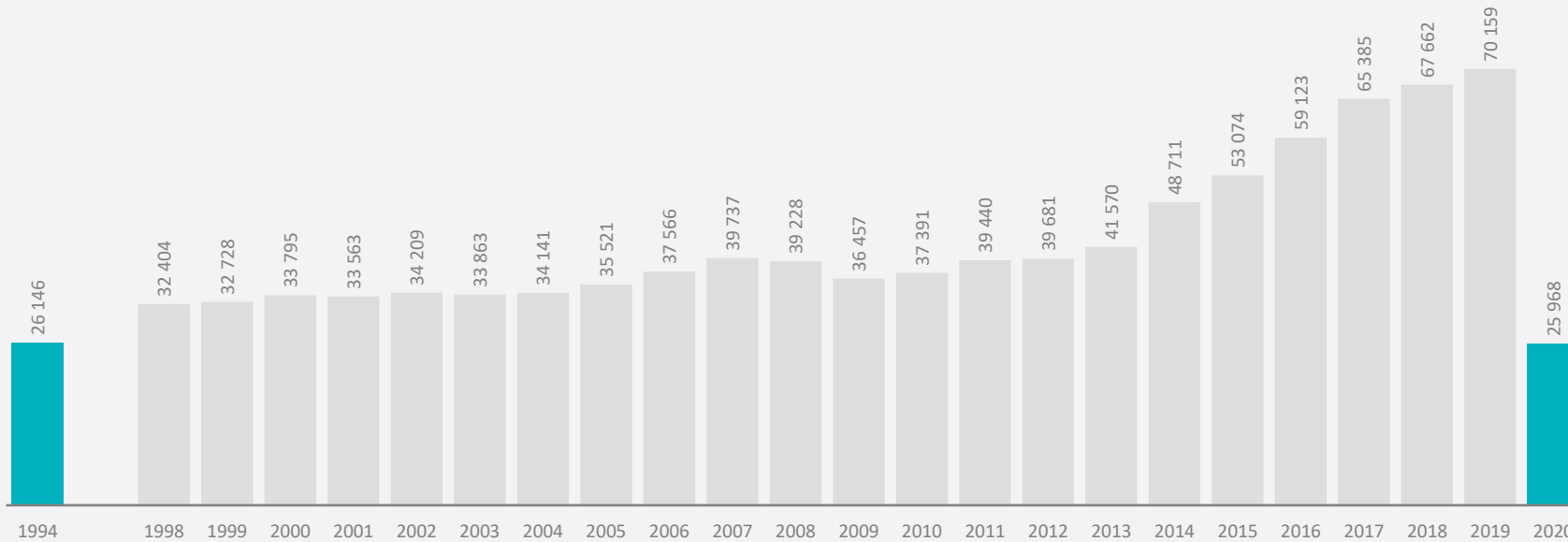
# WHERE ARE WE



# OVERNIGHTS | 2021

**12,7**  
**Milhões**  
 (jan a jul)

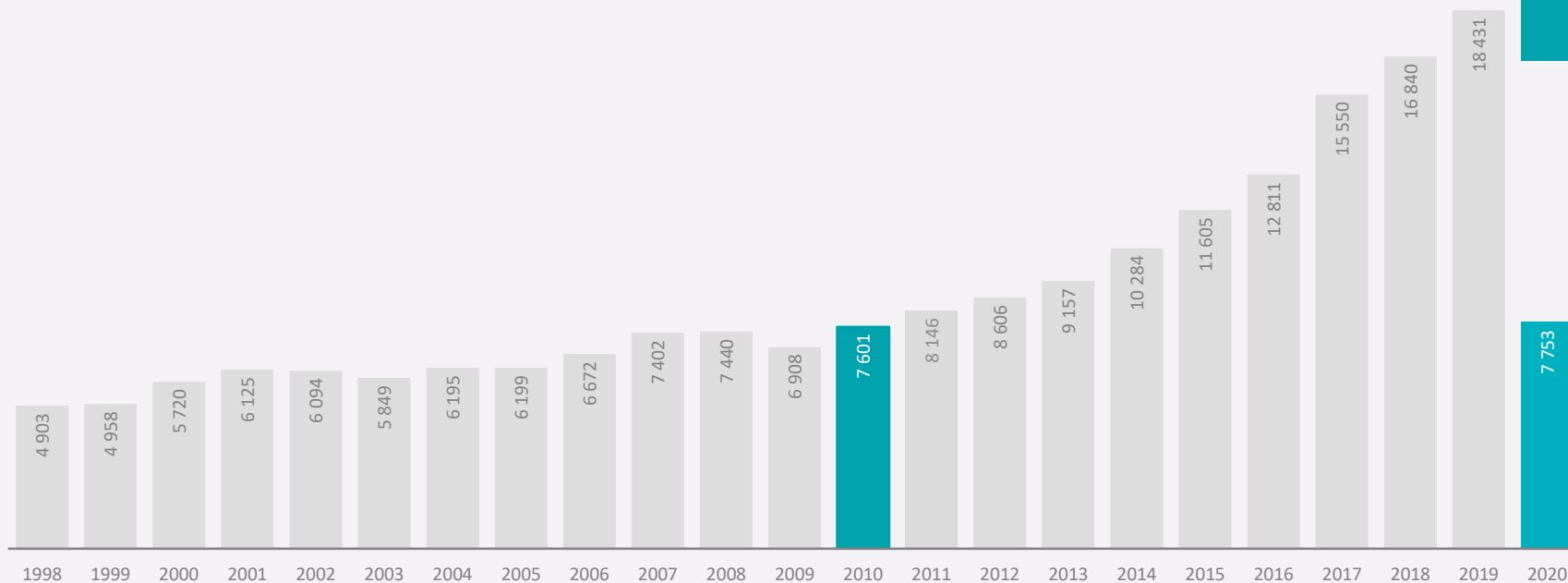
(-2,4% face a 2020)  
 (-67,4% face a 2019)



Fonte: INE/TP, Dados provisórios de 2020  
 Nota: A partir de 2014 inclui alojamento local e TER/TH



# RECEIPTS | 2021



**3,5**  
**Mil Milhões de €**  
 (jan a jul)

(-12,8% face a 2020)

(-63,3% face a 2019)



# LEADER BRAND | IN TRANSFORMATION



**Portugal as a strong relational brand, friendly, charming, attractive, traditional and accessible in process of transformations, affirmation and valorisation.**

## KEY STRENGTHS

FRIENDLY  
KIND  
CHARMING  
SOCIABLE  
TRADITIONAL  
FUN  
FASHIONABLE  
ORIGINAL  
BECOMING POPULAR  
GOOD RATIO VALUE/MONEY



# 2.

# WHERE DO WE WANT TO GO



# LEADER BRAND | MORE VALUE



A strongly relational brand, friendly, with strong power of attraction and seduction, charming, with style, traditional authentic, prestigious, with stronger value.

## KEY STRENGTHS

FRIENDLY  
 KIND  
 CHARMING  
 SOCIABLE  
 TRADITIONAL  
 FUN  
 FASHIONABLE  
 ORIGINAL  
 BECOMING POPULAR  
 GOOD RATIO VALUE/MONEY

STYLE  
 COOL  
 AUTHENTIC  
 ÚNIQUE  
 DISTINCTIVE  
 GLAMOROUS  
 PRESTIGIOUS



# FORECASTS

<b>Investiment M€</b>	<b>6.112,24</b>								<b>CAGR 2027/23</b>	<b>10,6%</b>
	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	
<b>Receipts</b>	18.290.990	7.753.040	9.303.648	13.955.472	18.290.990	20.235.575	22.386.896	24.766.933	27.400.000	
				50,0%	31,1%	10,6%	10,6%	10,6%	10,6%	
<b>Balance*</b>	13.108.900	4.958.000	6.603.032	9.904.548	12.981.574	14.361.695	15.888.541	17.577.713	19.446.467	
<b>% Balance</b>	71,7%	63,9%	71,7%	71,7%	71,7%	71,7%	71,7%	71,7%	71,7%	

\* O saldo da Balança Turística: corresponde ao contributo do setor para Balança de pagamentos

<b>Receita 2021-2027</b>
<b>136.339.514</b>

<b>Contributo BP 2021-2027</b>
<b>96.763.570</b>



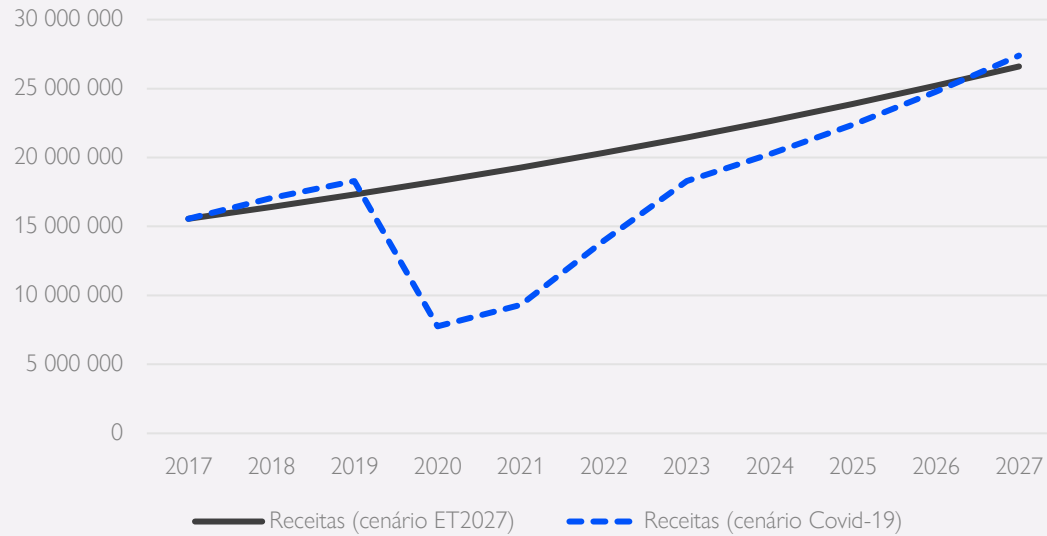


# FORECASTS

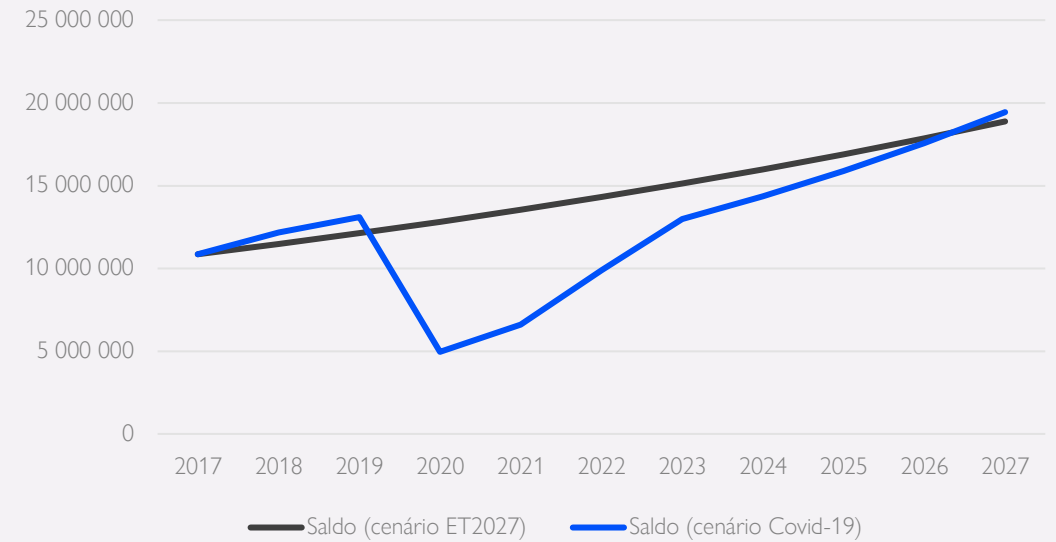
**CAGR  
27/23**

**10,6%**

Receitas do Turismo (milhares euros)



Saldo da Balança Turística (milhares euros)



**Receita  
2021-2027**

**136.339.514**

**Contributo BP  
2021-2027**

**96.763.570**



# 3.

## HOW DO WE GET THERE

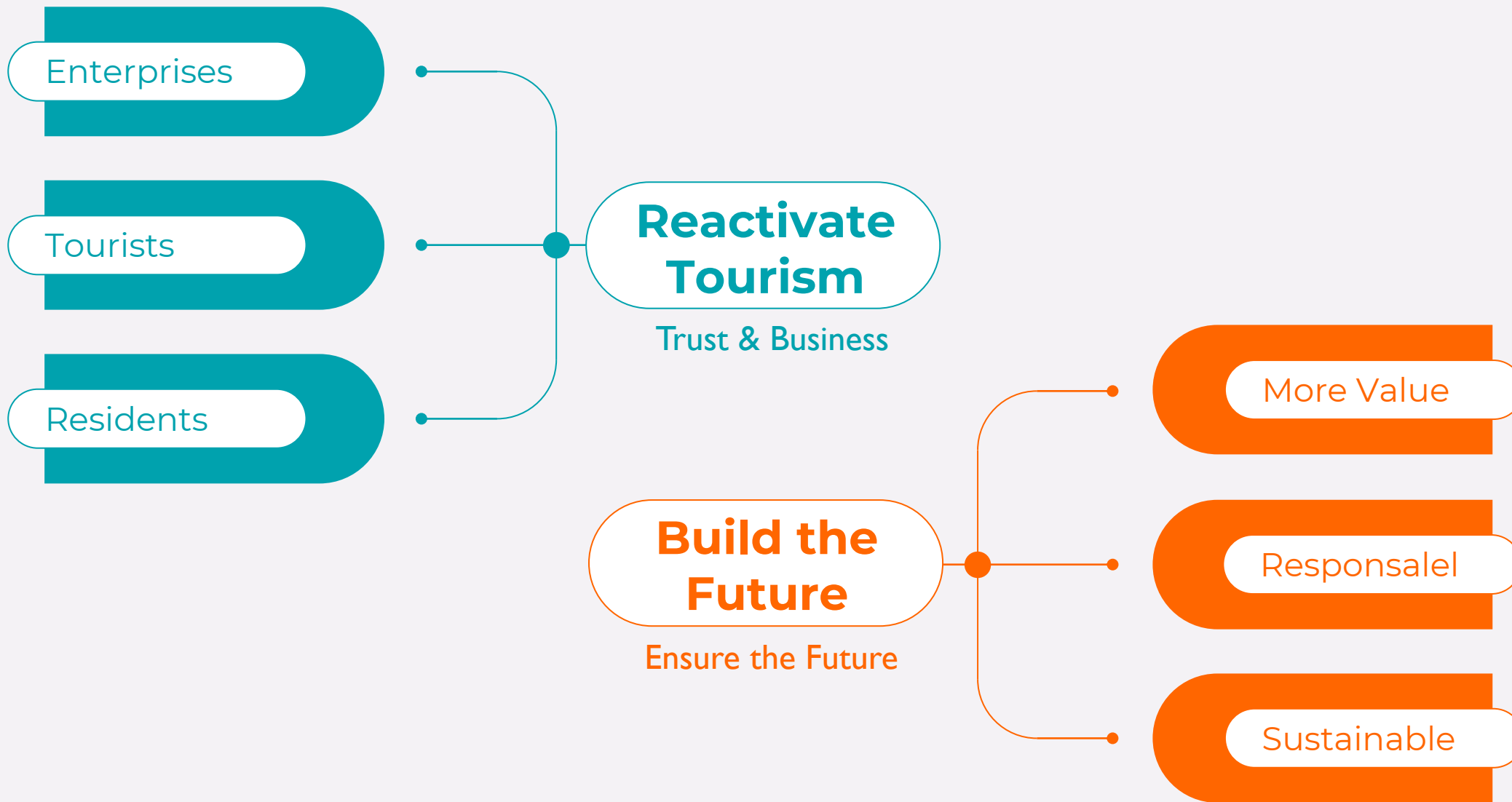




*Reativar o Turismo. Construir o Futuro.*  
• Plano de Ação •



# STRATEGIC GOALS





# PILLARS



## Support Enterprises

### Financial Strategic

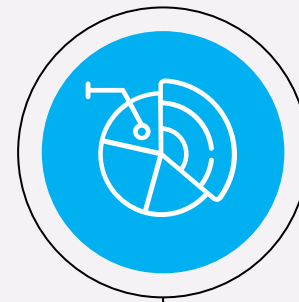
Financially support the enterprises through flexible and adjusted instruments. Support enterprises on their strategic Growth and transformation, keeping the value chain available and ready for the restart of the activity.



## Stimulate Safety

### Business Activity Tourists Behaviour

Take into account the new tourism needs and prepare the businesses for these new needs. Stimulate communication in order to increase safety perception to enterprises and its workers



## Generate Business

### Short Term, Médium / Long Term

Contribute to generate business, stimulating markets and consumers, restoring connectivity, facilitating sales and informing consumers.



## Build Future

### Responsible Sustainable

Accelerate the construction of the Tourism of The Future, more inteligente, more responsible and more sustainable.



# PILLARS



## Support Enterprises

### Financial Strategic

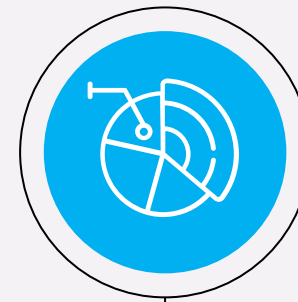
1. Preserve Value Chain and Employment
2. Improve Business Operations



## Stimulate Safety

### Business Activity Tourists Behaviour

1. Tourist Activity
2. Consumers Social Behaviour



## Generate Business

### Short Term, Médium / Long Term

1. Destination Competitiveness
2. Mobility
3. Stimulate Demand



## Build Future

### Responsible Sustainable

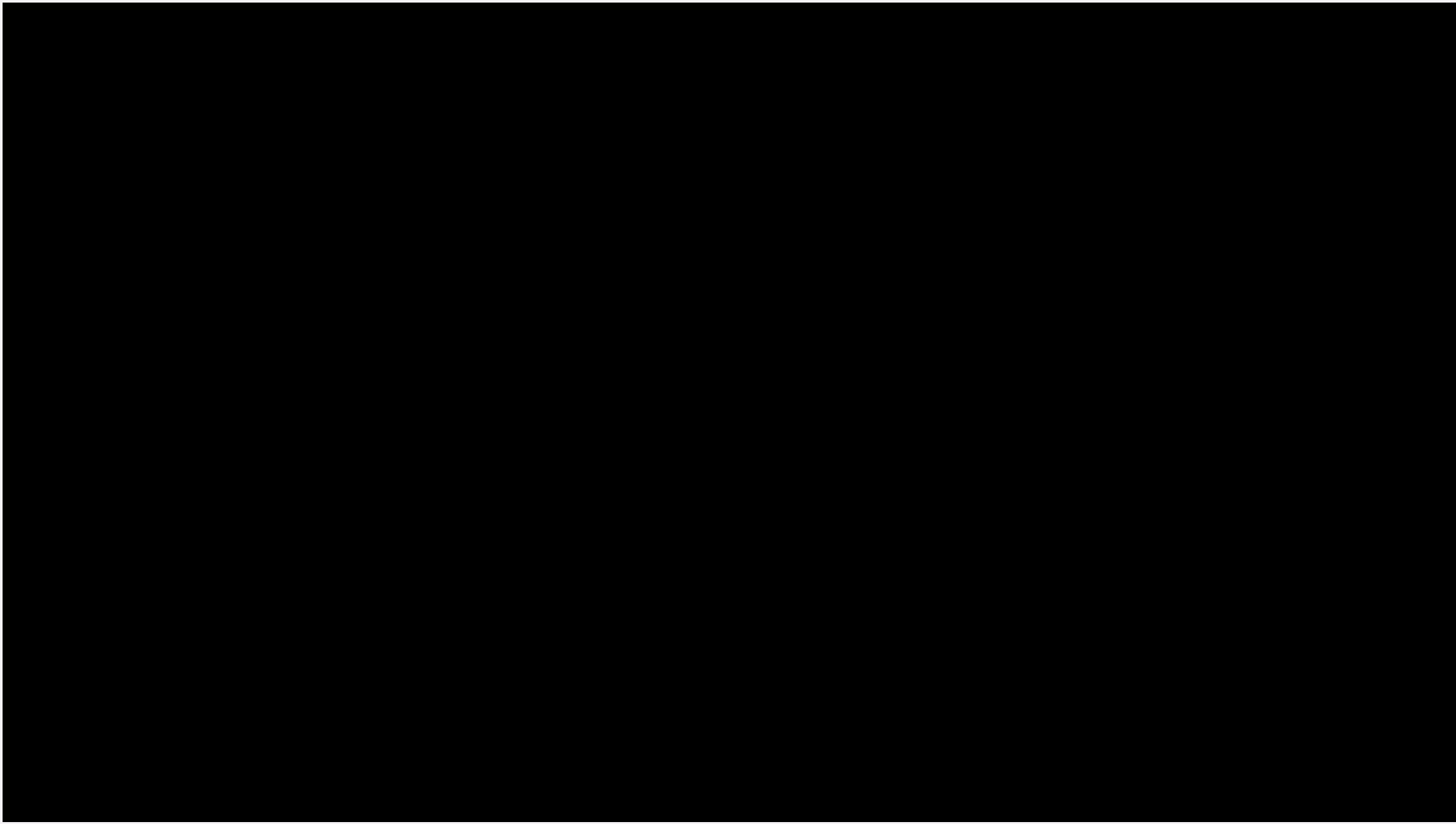
1. Financial Support
2. Training and Skills
3. Innovation in Enterprises and Destination
4. Sustainability in Enterprises and Destination



visit Portugal



PARA UM PLANETA MELHOR. UM TURISMO MELHOR.





# THANK YOU