TSA & TOURISM POLICIES

THE CASE OF PORTUGAL

WORKSHOP “MEASURING THE ECONOMIC IMPACT OF TOURISM IN EUROPE: THE TOURISM SATELLITE ACCOUNT”
TURISMO DE PORTUGAL
KPIs 2016

- **Tourism Receipts** (2016, BdP): €12.7bn
- **Exports** (2016): +16.7%
- **Travel & Tourism Competitiveness Index** (2017): 14th place
- **Tourism Balance** (2016, BdP): €8.8bn
- **Tourism/GDP** (2010, TSA): 9.2%
- **Employment/Economy** (2008, TSA): 8.2%

International Tourists at hotels: +12.7%
International Tourism Receipts: +10.7%
TURISMO DE PORTUGAL
National Tourism Authority

- Development of Tourism Offer
- Supporting Investment
- Marketing & Promotion
- HR Training
- Gambling Regulation

Knowledge
2027 Tourism Strategy
Leading the Tourism of the Future

Strategic pillars

- Territory Valorization
- Promote Portugal
- Promote Knowledge
- Manager Networks and Connectivity
- Foster Economy
2027 Tourism Strategy

Growth

Overnight stays in the territory

Goal 2027
80 Mn

Tourism Receipts

Goal 2027
26 Bn€
2027 Tourism Strategy
Sustainable Growth!

**Skills**

<table>
<thead>
<tr>
<th></th>
<th>[2015]</th>
<th>[2027]</th>
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<tbody>
<tr>
<td>Superior</td>
<td>12%</td>
<td>28%</td>
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<tr>
<td>Secondary</td>
<td>30%</td>
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<tr>
<td>Primary</td>
<td>58%</td>
<td>60%</td>
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</tbody>
</table>

**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
2027 Tourism Strategy
Sustainable Growth!

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

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

**Waste**
Goal 2027
+ 90% of tourism companies develop waste management measures
2027 Tourism Strategy

Sustainable Growth!

“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”
THE NEED FOR + KNOWLEDGE

Tourism Policies & TSA

- Help building the case for tourism
- Show links and impacts between the tourism industry and the economy
- Detailed data on tourism employment and needs in terms of HR
- Identify impacts in terms of regional development
- Patterns of spend within the destination
- Calculate tourism value added

BEYOND GROWTH
RE-LAUNCHING TSA IN PORTUGAL

Key policy instrument...latest version (2010)

- Promoting knowledge is on the key areas in terms of tourism policy in Portugal
- Business intelligence & analytics as main drivers to promote knowledge transfer
- Enlarging available knowledge base (borders survey, TSA, new data sources)
  - Partnership with Statistics Portugal to re-launch TSA & Survey on International Tourism (2015) – 1st results in 2017
  - Partnership with Statistics Portugal and Portugal’s Central Bank to develop the tourism statistics system (2017)
## FUTURE CHALLENGES

TSA as a tool for promoting tourism development

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<thead>
<tr>
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<th>Challenge</th>
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<tbody>
<tr>
<td>1</td>
<td>Promote knowledge sharing in terms of the use of TSA, both at research and industry levels</td>
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<td>2</td>
<td>How to go beyond traditional KPIs, extending the use of TSA’s analytical and research capacity</td>
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<td>3</td>
<td>Sustainable TSA operation (funding, adding new data sources,…) and regional approaches – timeliness and effective use/applicability</td>
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<td>4</td>
<td>Dynamic and stable partnerships (statistics offices, policy makers, academics)</td>
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<td>5</td>
<td>TSA and Environmental Satellite Accounts – measuring environmental impacts of tourism</td>
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Thank You!

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