

UK Market

Challenges and Opportunities

Lisbon, 15 March 2019



TURISMO DE
PORTUGAL



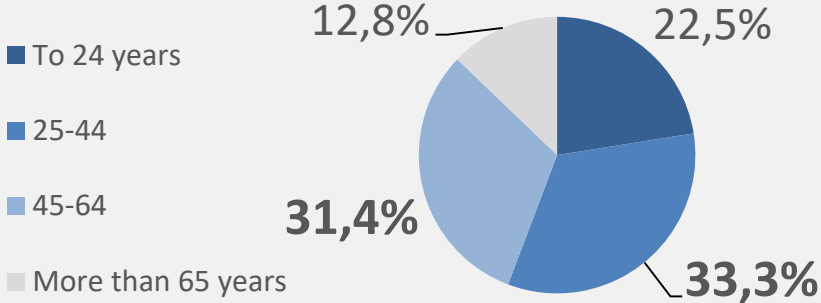
Market Overview to Portugal

TOURISTS

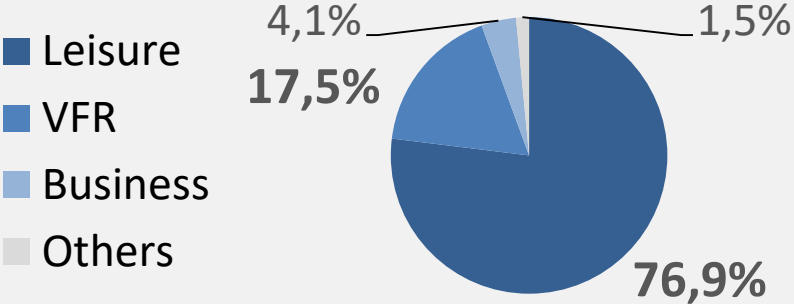
3,1 millions tourists in 2016 and 3,5 in 2017 (+12,3%)

8,2 days average stay
Average spent 768,8 € per capita and per trip

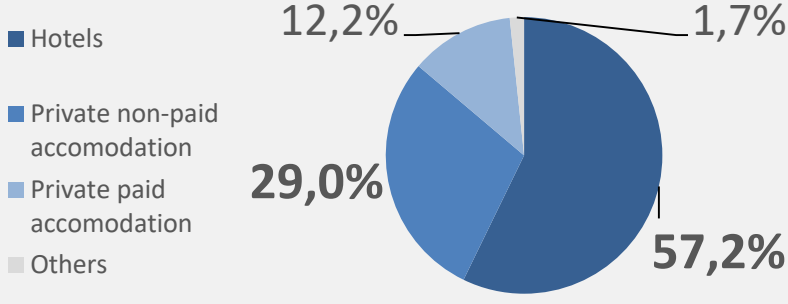
DEMOGRAPHICS – 51,7% females vs 48,3% males



MOTIVATIONS



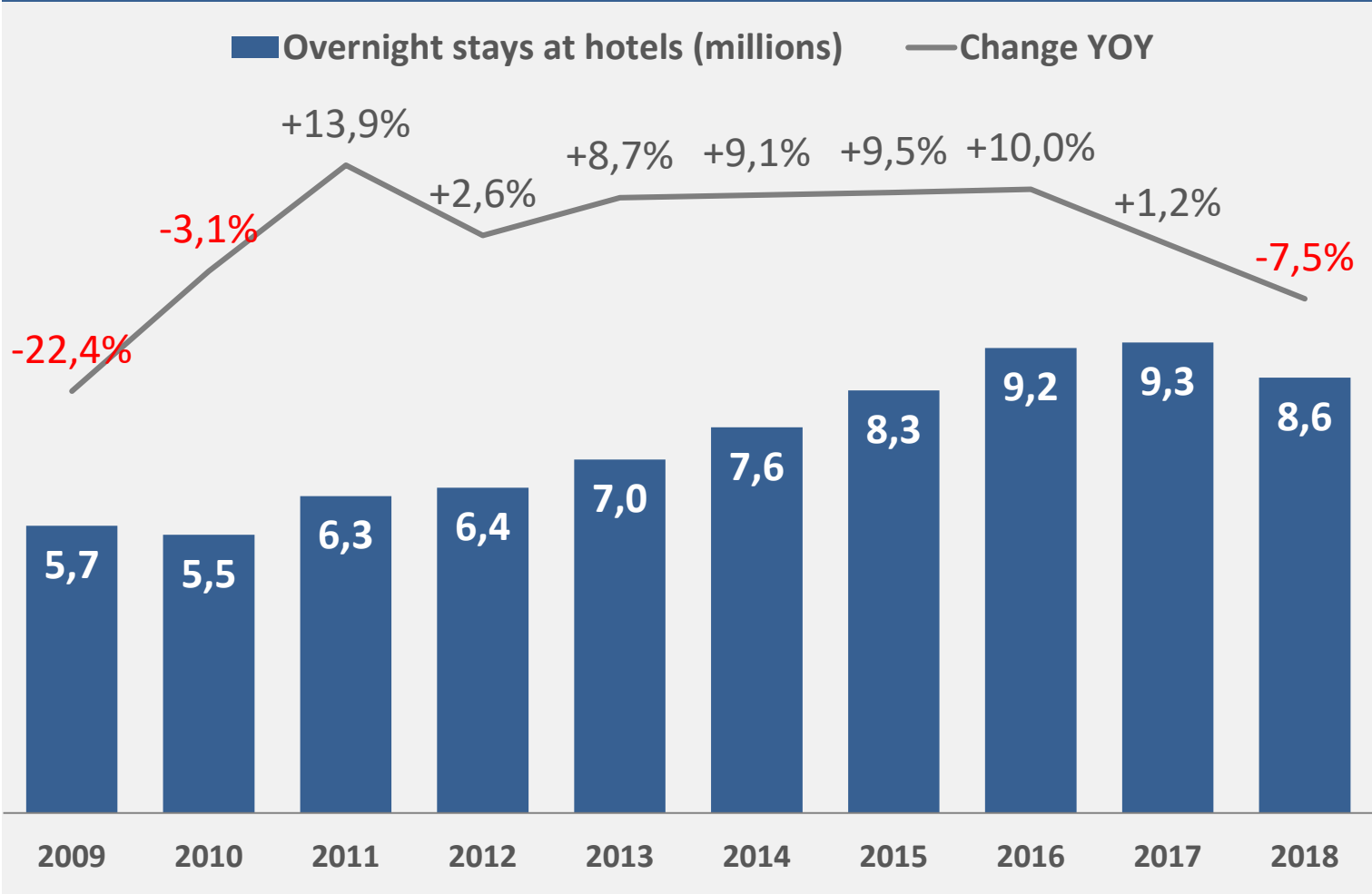
ACCOMMODATION



Source: INE Statistics Portugal (Survey on International Tourism)

Market Overview to Portugal

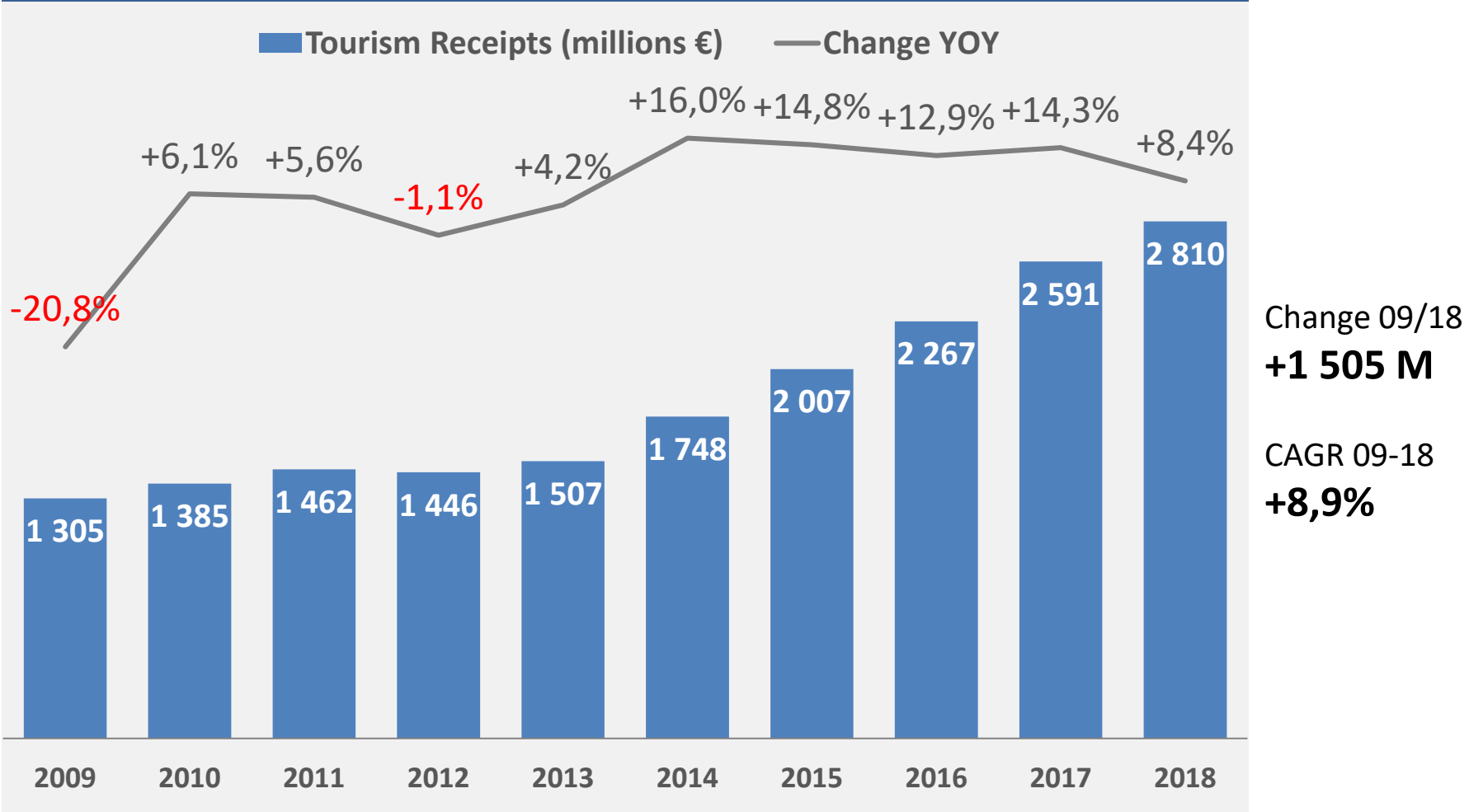
UK Market: 21,0% in 2018 vs 24,4% in 2009 (-3,4 p.p.)



Source: INE Statistics Portugal

Market Overview to Portugal

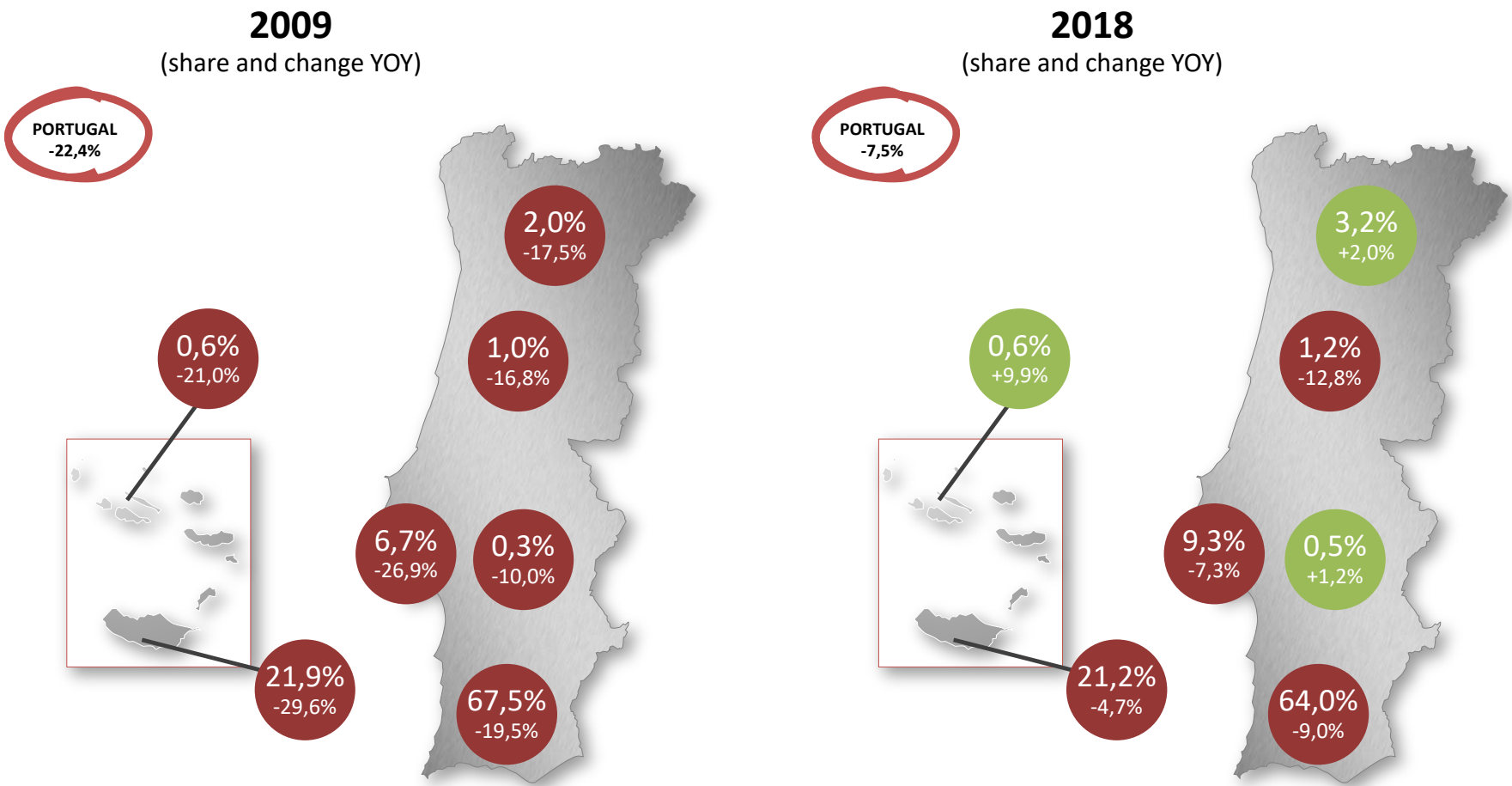
UK Market: 16,9% in 2018 vs 18,9% in 2009 (-2,0 p.p.)



Source: Banco de Portugal

Market Overview to Portugal

Overnight stays in hotels, by destinations



Source: INE Statistics Portugal

Market Overview to Portugal

Connectivity

SUMMER 18

AVG 682 WF from 26 airports



AVG 77 WF from 9 airports to Porto
AVG 187 WF from 10 airports to Lisboa
AVG 373 WF from 25 airports to Faro
AVG 42 WF from 13 airports to Funchal
AVG 3 WF from 3 airports to Ponta Delgada



Source: ANA – Aeroportos de Portugal

Market Overview to Portugal

Connectivity

WINTER 18

AVG 401 WF from 20 airports



- AVG 68 WF from 8 airports to Porto
- AVG 180 WF from 8 airports to Lisboa
- AVG 113 WF from 18 airports to Faro
- AVG 39 WF from 11 airports to Funchal
- AVG 1 WF from 1 airport to Ponta Delgada



Source: ANA – Aeroportos de Portugal

Promoting Portugal in the UK

PORTUGAL
What's On Offer!




Promoting Portugal in the UK

**All Year Round
Multi-product
Destination**

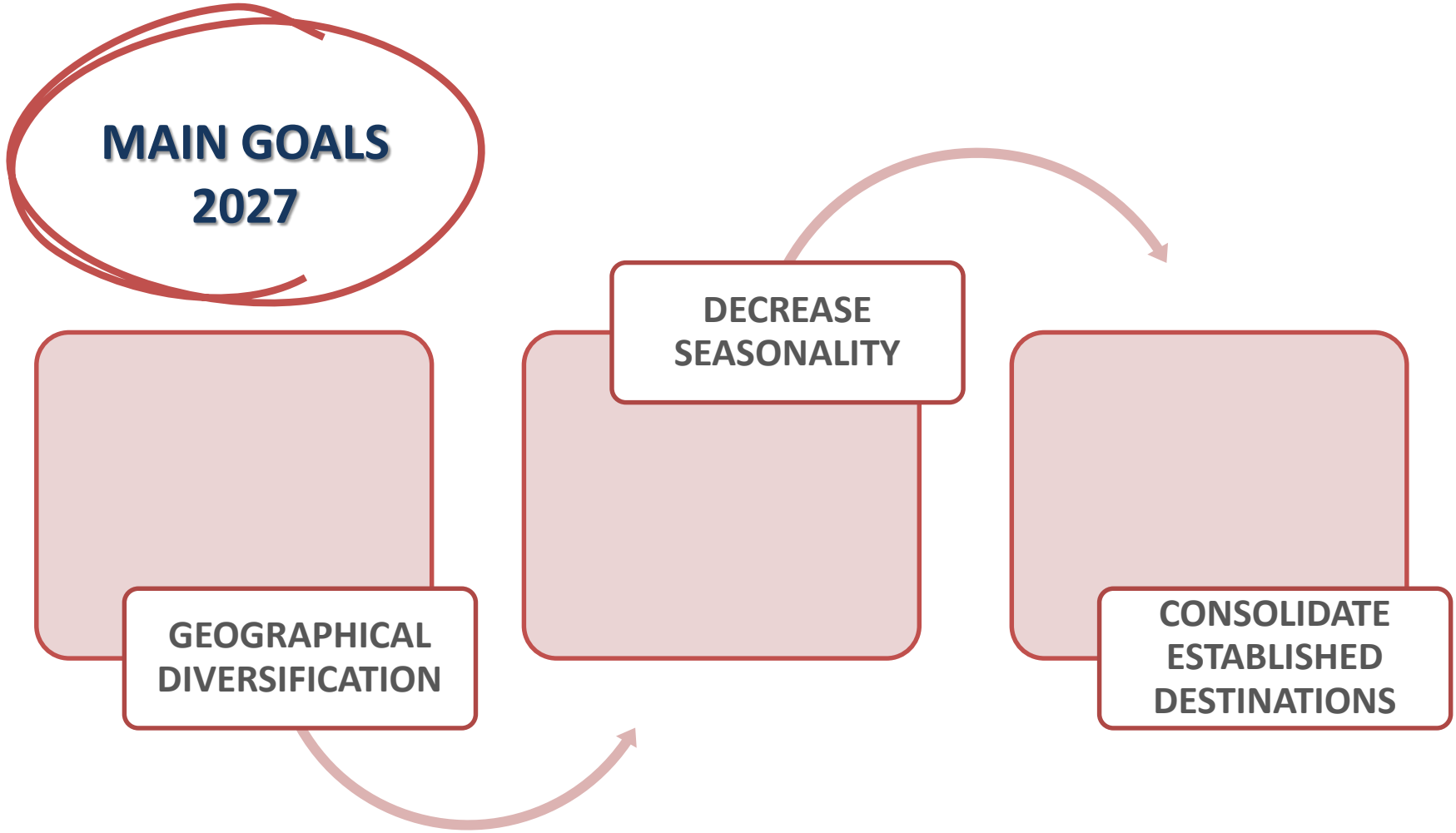


Promoting Portugal in the UK

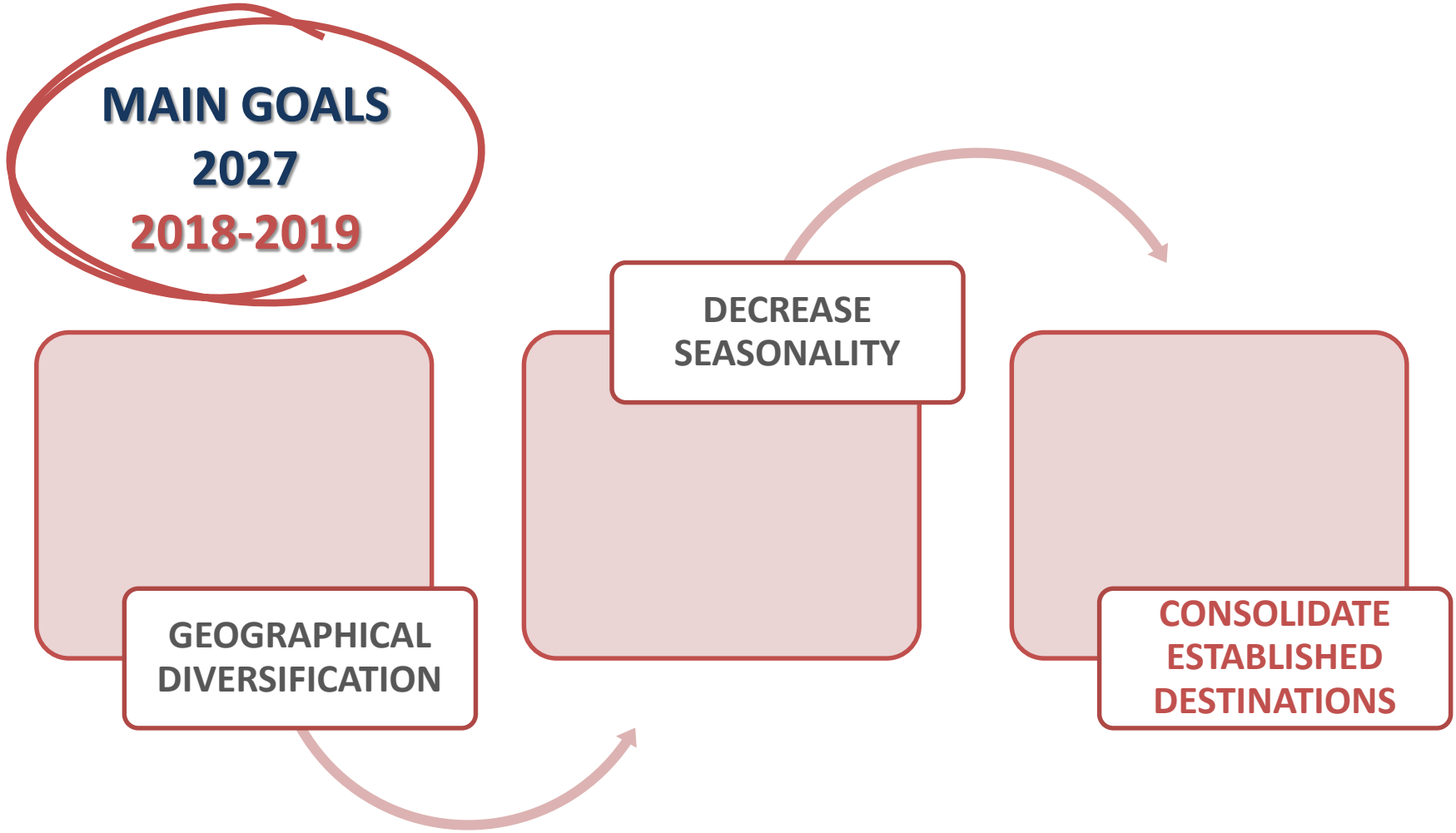


**But...
... still to be
fully
recognised!**

Promoting Portugal in the UK



Promoting Portugal in the UK

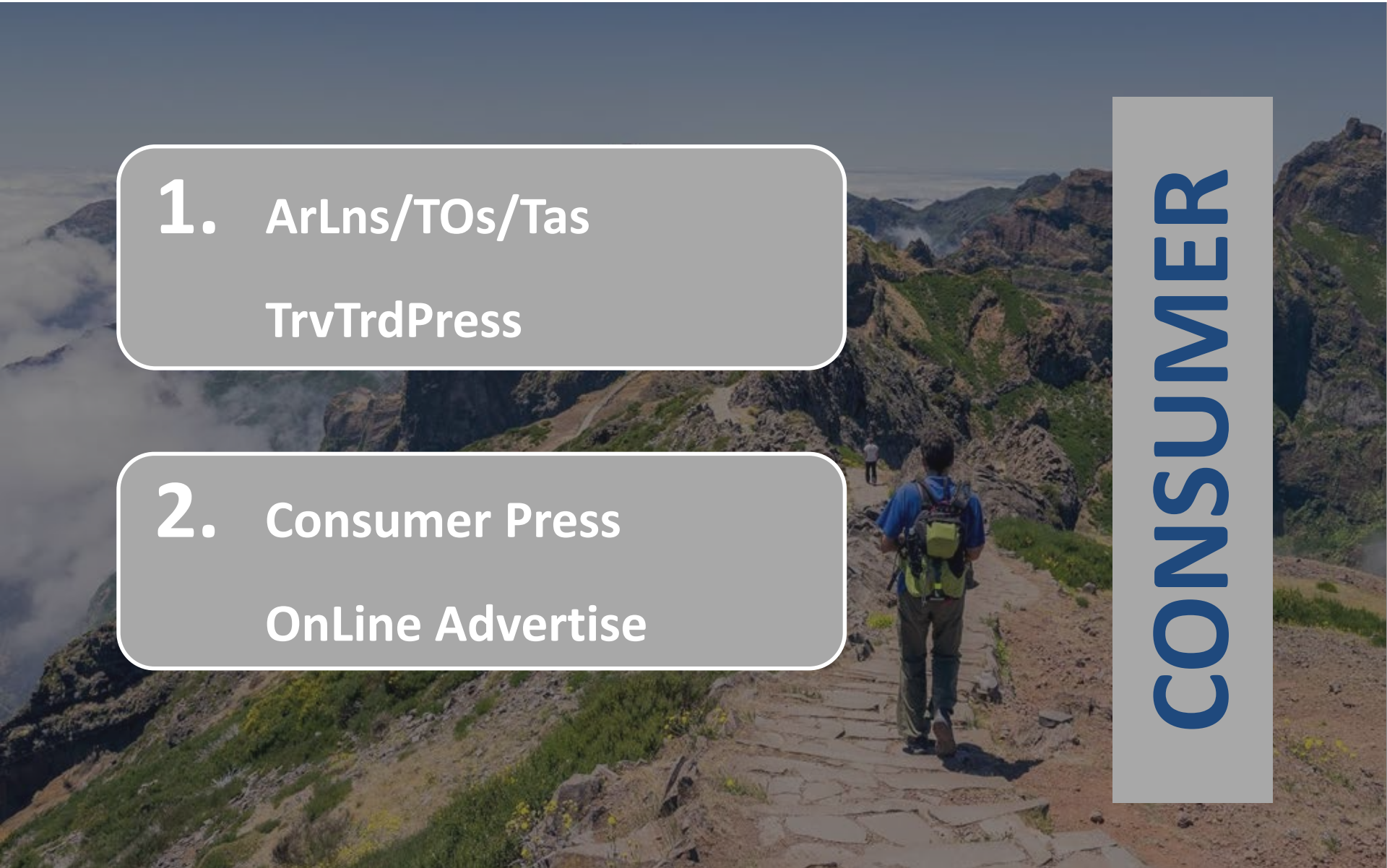


Promoting Portugal in the UK

1. ArLns/TOs/Tas
TrvTrdPress

2. Consumer Press
OnLine Advertise

CONSUMER



Promoting Portugal in the UK

No Deal Scenario 



Everyday Activities



TW / C&IT Projects

AITO Campaign

Azores Campaign

Special Int. Holidays Development



UK Office PR Company

UK/BREXIT Sessions

BREXIT Campaign

Airline & TO (anticipate/increase)
MICE Campaign

Promoting Portugal in the UK

No Deal
Scenario

Portugal Competitive Advantages

- Good Brand Awareness and Image
- Accessibility
- Diversity
- Empathy
- Value for Money
- Safety

No Deal
Scenario

Contingency Plan

- Visa exemption (trips up to 90 days)
- Dedicated passport control areas
- Driving licenses possible mutual recognition
- Portuguese NHS access
- UK travel insurance policies validity
- Simplified requirements for UK nationals' pets

Portugal will never
leave the British

THANK YOU

TURISMO DE
PORTUGAL

