## TOURISM IN PORTUGAL

2019: record figures in all indicators

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Change</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals at hotels</td>
<td>+7.3%</td>
<td>26.9M</td>
</tr>
<tr>
<td>Overnight stays</td>
<td>+4.1%</td>
<td>69.9M</td>
</tr>
<tr>
<td>Tourism receipts</td>
<td>+15.6%</td>
<td>18.4 bn€</td>
</tr>
<tr>
<td>Disembarked passengers</td>
<td>+8.1%</td>
<td>24.7M</td>
</tr>
<tr>
<td>Hotel Global Revenues</td>
<td>+7.3%</td>
<td>4.3 bn€</td>
</tr>
<tr>
<td>Occupancy Rate Rooms</td>
<td>+0.6 p.p.</td>
<td>65.6%</td>
</tr>
</tbody>
</table>

Sources: INE, Banco de Portugal, ANA, Turismo de Portugal
TOURISM IN PORTUGAL

A key sector in the Portuguese economy

<table>
<thead>
<tr>
<th>GDP</th>
<th>TOTAL EXPORTS</th>
<th>SERVICES EXPORTS</th>
<th>GOODS EXPORTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Consumption/GDP</td>
<td>Tourism Receipts/Total Exports</td>
<td>Tourism Receipts/Services Exports</td>
<td>Tourism Receipts/Goods Exports</td>
</tr>
<tr>
<td>14.6%</td>
<td>19.7%</td>
<td>52.3%</td>
<td>37.7%</td>
</tr>
</tbody>
</table>

Source: Banco de Portugal
IMPACT OF COVID-19 | PORTUGAL

Significant Impact in the Portuguese tourism industry

SEP 2020

-61.3% Hotel Guests
-59.3% Overnight Stays
-55.8% Tourism Receipts

Source: Statistics Portugal; Banco de Portugal
A vast program of measures in terms of investment support, in terms of taxation (1.6 Bn€)

Simplified regime of access to furlough, supporting costs from tourism companies in order to maintain jobs

▪ Clean&Safe Stamp
▪ Support to Investment Advisory Team
▪ Data Monitoring
▪ Training courses
▪ Consultancy from Hotel Schools

▪ Hotel Schools 100% online
▪ #Rooms4covid

▪ Portugal Tourism Response
▪ Cuida de todos (take care of all)
▪ #cantskip hope
▪ #cantskip opening
▪ Read Portugal
▪ Only You / Visit Portugal
MITIGATION COVID-19

Supporting Economy | Sinopsys

- **Cash Flow Measures**: 54.4 M€ paid
- **Economy Support Measures**: 1,438 M€ engaged
- **Program Adapting**: 10.6 M€ engaged
- **Program Supporting**: 63.9 M€ granted
- **Other Measures**: 47 M€ deferred

Total support to the tourism sector: 1,613.9 M€

Fonte: Turismo de Portugal; SPGM
#godigitalelearningmode

- **ONLINE CLASSES**
- **ONLINE TRAINING**
- **DIGITAL SKILLS**
- **HEALTH & SAFETY**
- **CRISIS MANAGEMENT**
- **MARKET INTELLIGENCE**
Sustainability
New Business Models
Creativity
Problem solving
Soft skills
Risk Management
Digital literacy
Business Analytics
Digital Marketing
Revenue Management

Clean & Safe Stamp

Being a CleanSafe Stamp compliant means committing to comply with health safety recommendations issued by the National Tourism Authority according to National Health Authority guidelines.

21 670 stamps already issued
23 000 people trained

20 stickers
200 people trained

Courses offered:

- Business and Tourism Management
- Digital Marketing
- Risk Management
GO DIGITAL | UPGRADING SKILLS

#godigitalearningmode

11/12/2020
UPGRADE
PROGRAMA DIGITAL
TURISMO DE PORTUGAL

UPGRADE
PROGRAMA SUSTENTABILIDADE
TURISMO DE PORTUGAL
Promote digital transformation
improve digital skills in tourism professionals
(digital literacy and advanced digital marketing skills)

Contributing to the creation of a culture of value
and sustainable innovation, through the integration
of good sustainability practices in a 360º approach
#godigitalelearningmode

## ONLINE CLASSES

- **3,217** Online students

## ONLINE TRAINING

- **742** sessions
- **73,270** participants

## DIGITAL SKILLS

- **41** webinars
- **4,886** participants

## HEALTH & SAFETY

- **+21,000** companies

## CRISIS MANAGEMENT

- **+ 500** consultancy projects

## MARKET INTELLIGENCE

- **18** webinars
- **5,238** participants
#CantSkipOpening