

The Future of Tourism

APDC's 29th Digital Business Congress
- The Future of Business

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Threats and concerns

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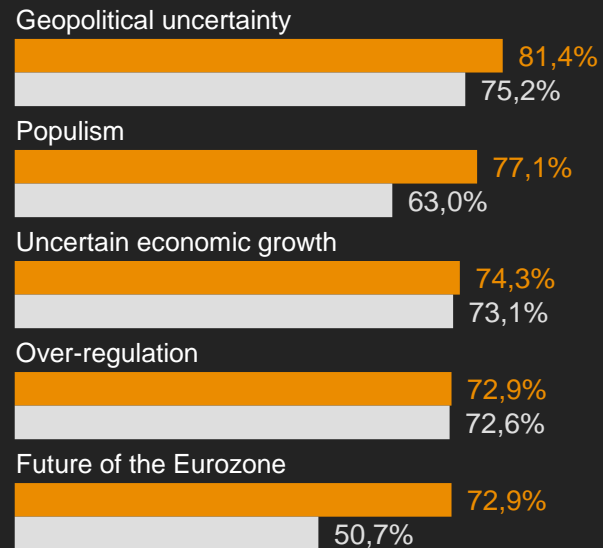
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Threats and concerns



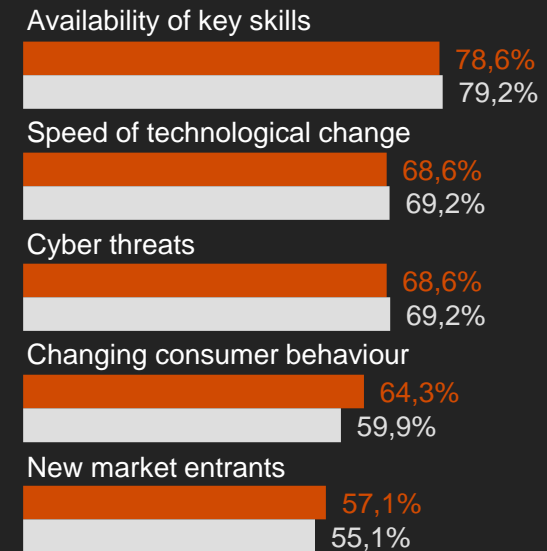
Top five threats and concerns to growth

Economic, political, social and environmental



Portugal Global

Business threats



Portugal Global

2


Tourism in Portugal



Competitiveness rankings


Portugal is more competitive in Tourism than at country level

Country Competitiveness Ranking (2019)

	Singapore	1 st
	United Kingdom	9 th
	France	15 th
	Spain	23 rd
	Italy	30 th
	Portugal	34 th
	Greece	59 th
	Turkey	61 st
	Croatia	63 rd



Tourism Competitiveness by country (2019)

	Spain	1 st
	France	2 nd
	United Kingdom	6 th
	Italy	8 rd
	Portugal	12 th
	Singapore	17 th
	Greece	25 th
	Croatia	27 st
	Turkey	43 rd

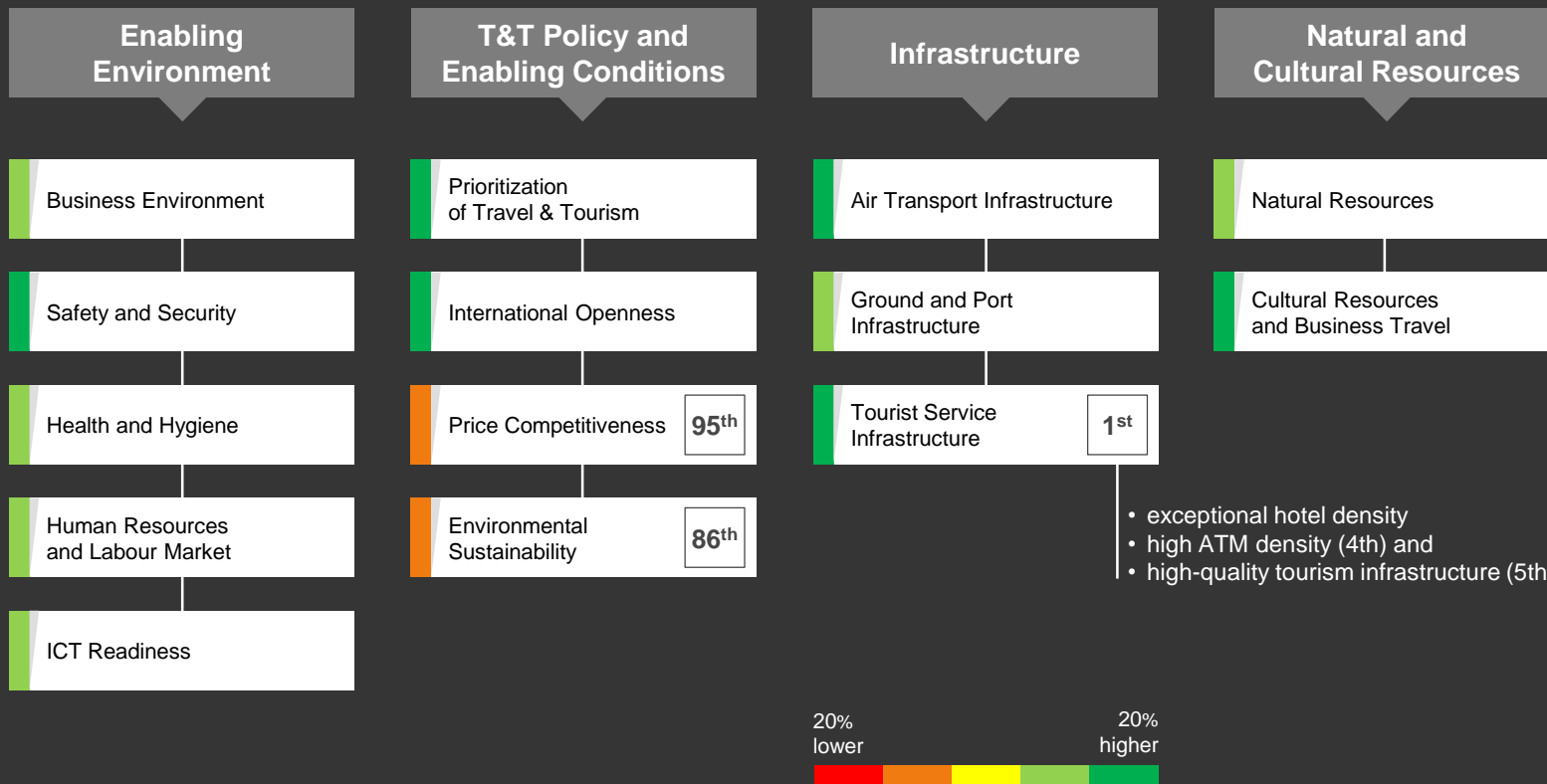


Tourism competitiveness in Portugal

4.9 in 7

12th in 140

Portugal's Tourism competitiveness evaluation by pillar



Positive points

- 1st Index of terrorism incidence
- 1st Number of regional trade agreements
- 5th Natural tourism digital demand
- 8th Country brand strategy

Improving points

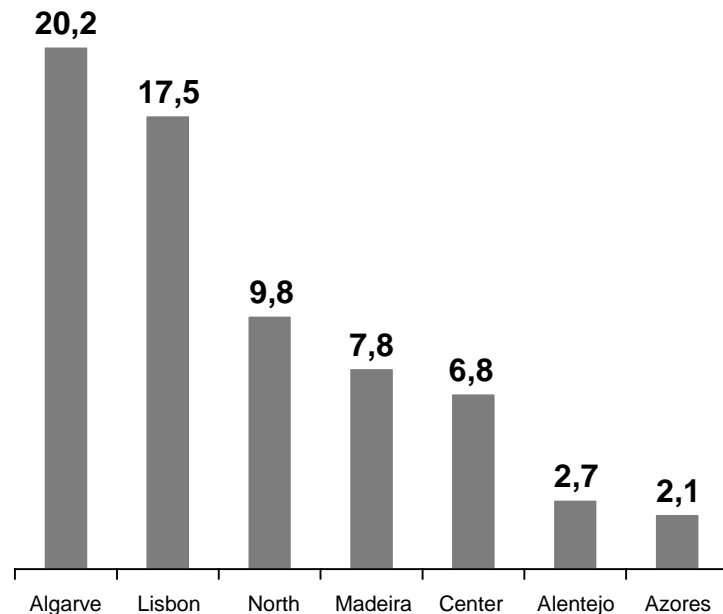
- 81st Comprehensiveness of annual T&T data
- 114th Labour and contributions tax rate
- 116th Efficiency of legal framework in settling disputes
- 125th Fuel price levels

Tourists overnight stays in Portugal in 2018

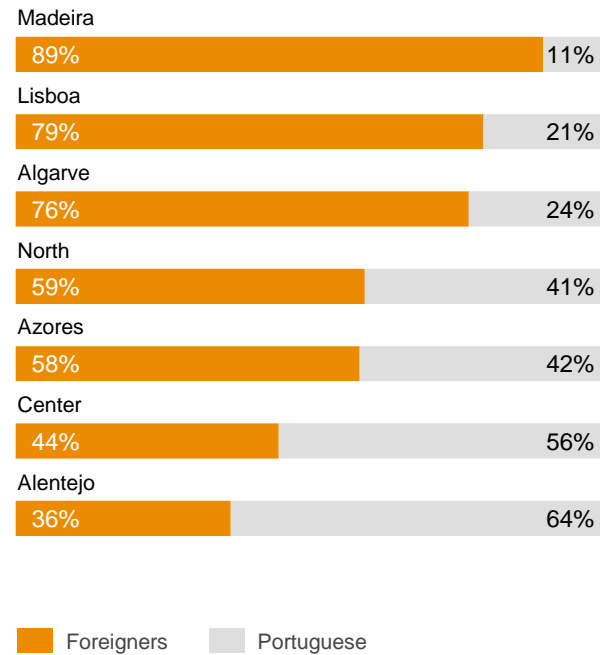
By region

Overnight stays in Portugal by region, 2018

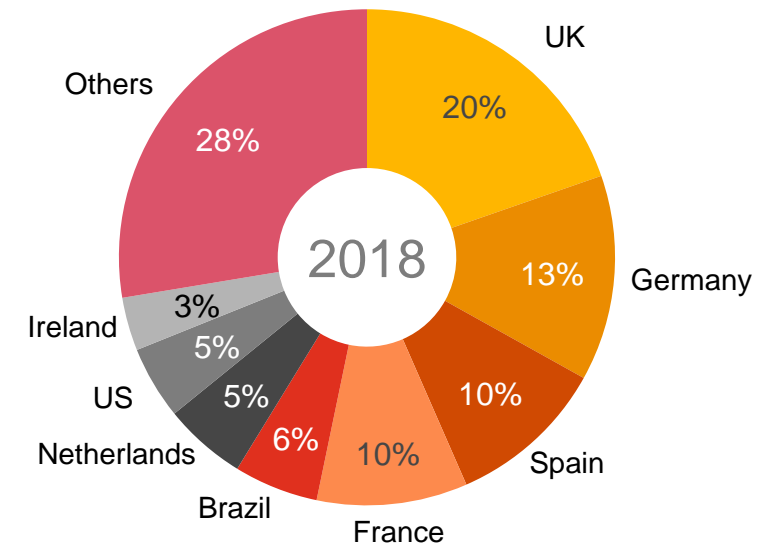
Million overnight stays



Overnight stays by region and type, 2018



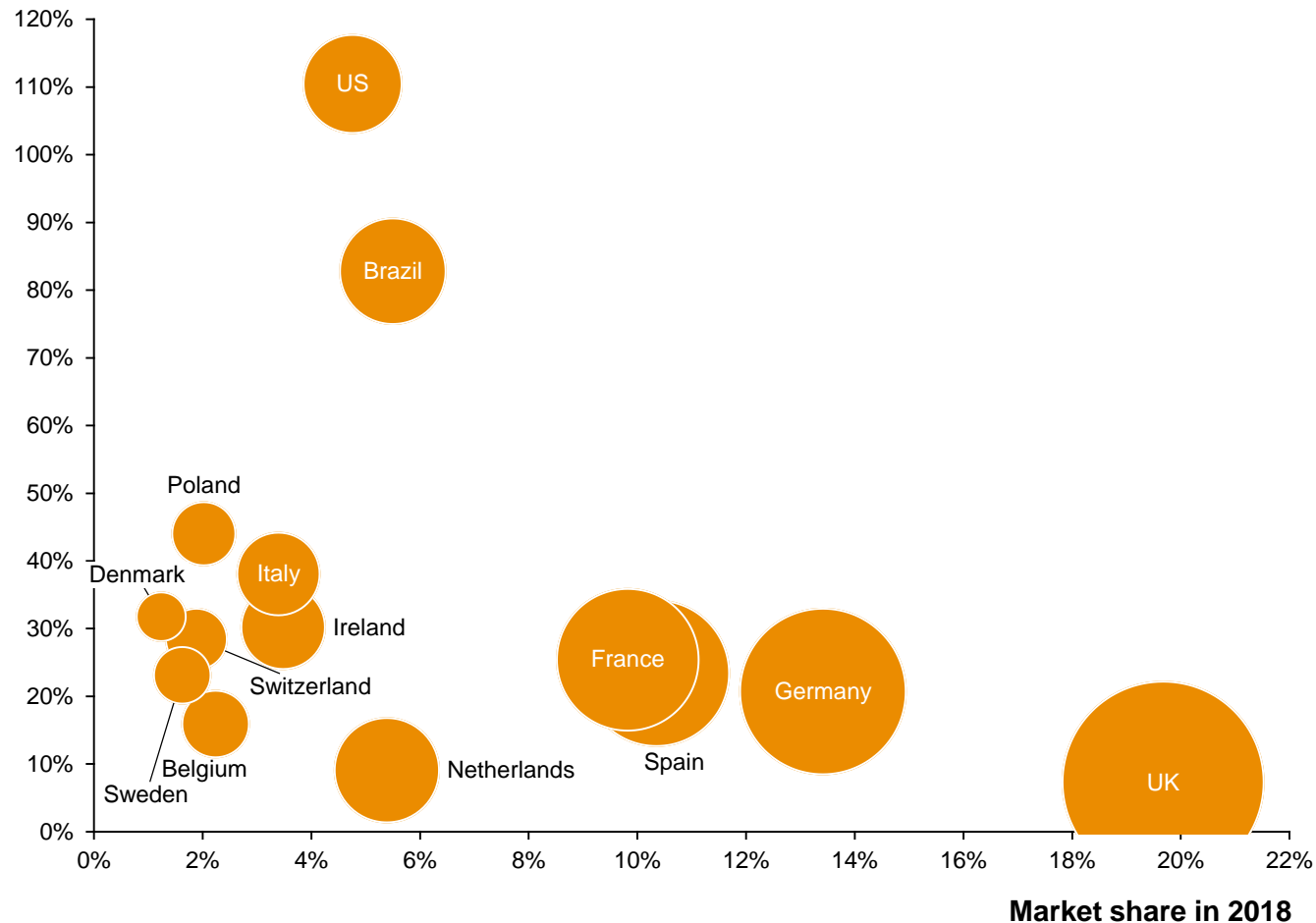
Key countries of origin, 2018



Tourists overnight stays in Portugal in 2018

Foreigners overnight stays – 2015-2018

Change 15-18



Country	Change 15-18	Market share in 2018
US	110.4%	4.8%
Brazil	82.8%	5.5%
Poland	44.0%	2.0%
Italy	38.1%	3.4%
Denmark	31.8%	1.2%
Ireland	30.2%	3.5%
Switzerland	28.5%	1.9%
France	25.4%	9.8%
Spain	23.4%	10.4%
Sweden	23.1%	1.6%
Germany	20.7%	13.4%
Belgium	15.9%	2.2%
Netherlands	9.1%	5.4%
UK	7.3%	19.7%

Source: Tourism of Portugal – Travel BI

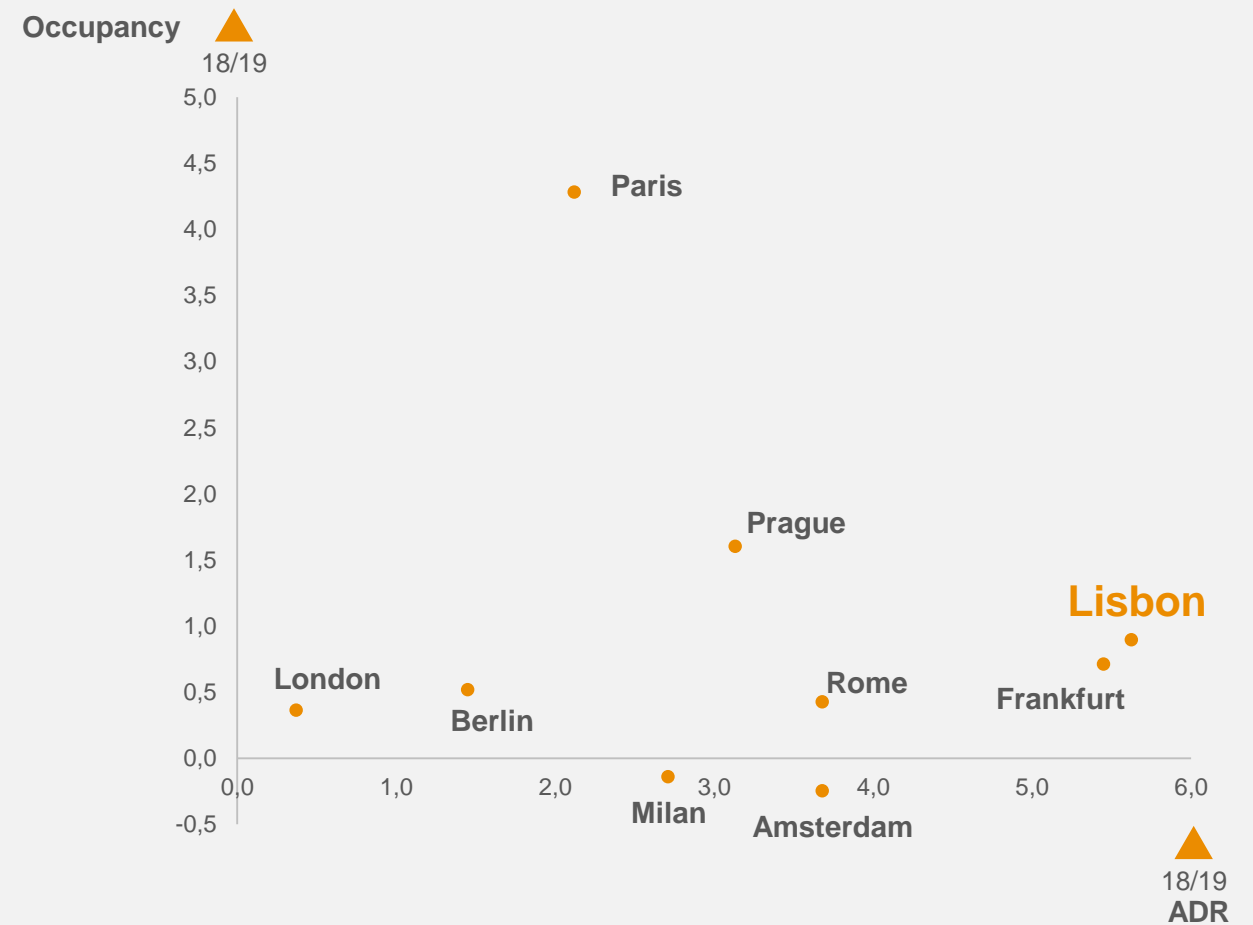
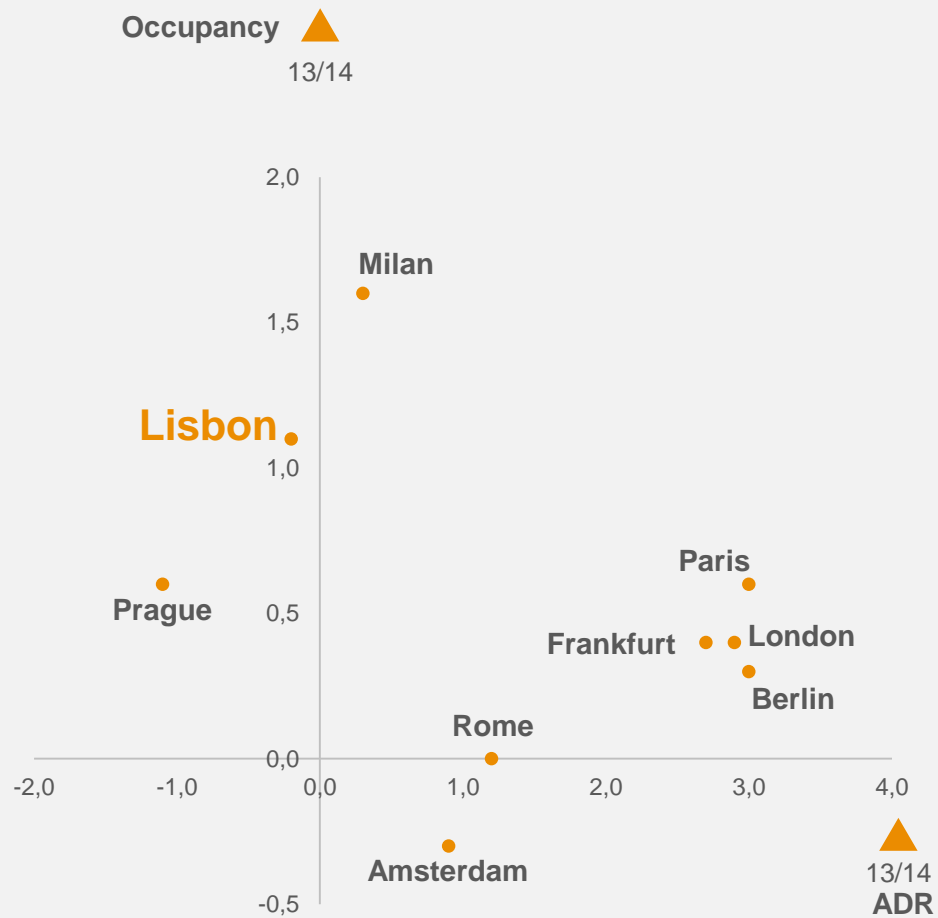
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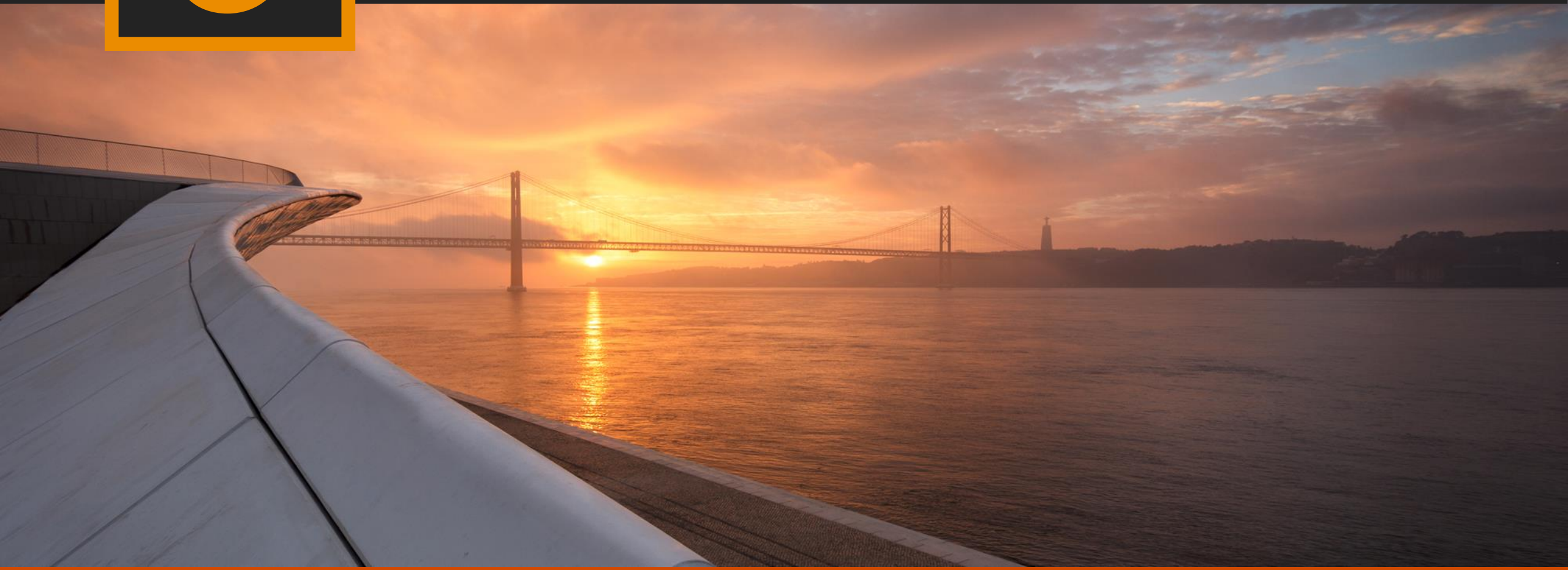
Lisbon is now growing in ADR. In 2014 grew by occupancy

European cities performance



3

Tourism Trends



Megatrends are changing all industries and businesses

Megatrends



Accelerating urbanisation



Demographic & Social Change



Resource scarcity & climate change



Shift in global economic power



Changing global politics

The Essential Eight



3-D Printing



Artificial Intelligence



Augmented Reality



Blockchain



Drones



Internet of things

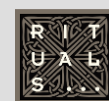


Robotics



Virtual Reality

The **Experience** Model



The **Subscription** Model



The **Access over Ownership** Model



The **Eco-System** Model



The **On-Demand** Model

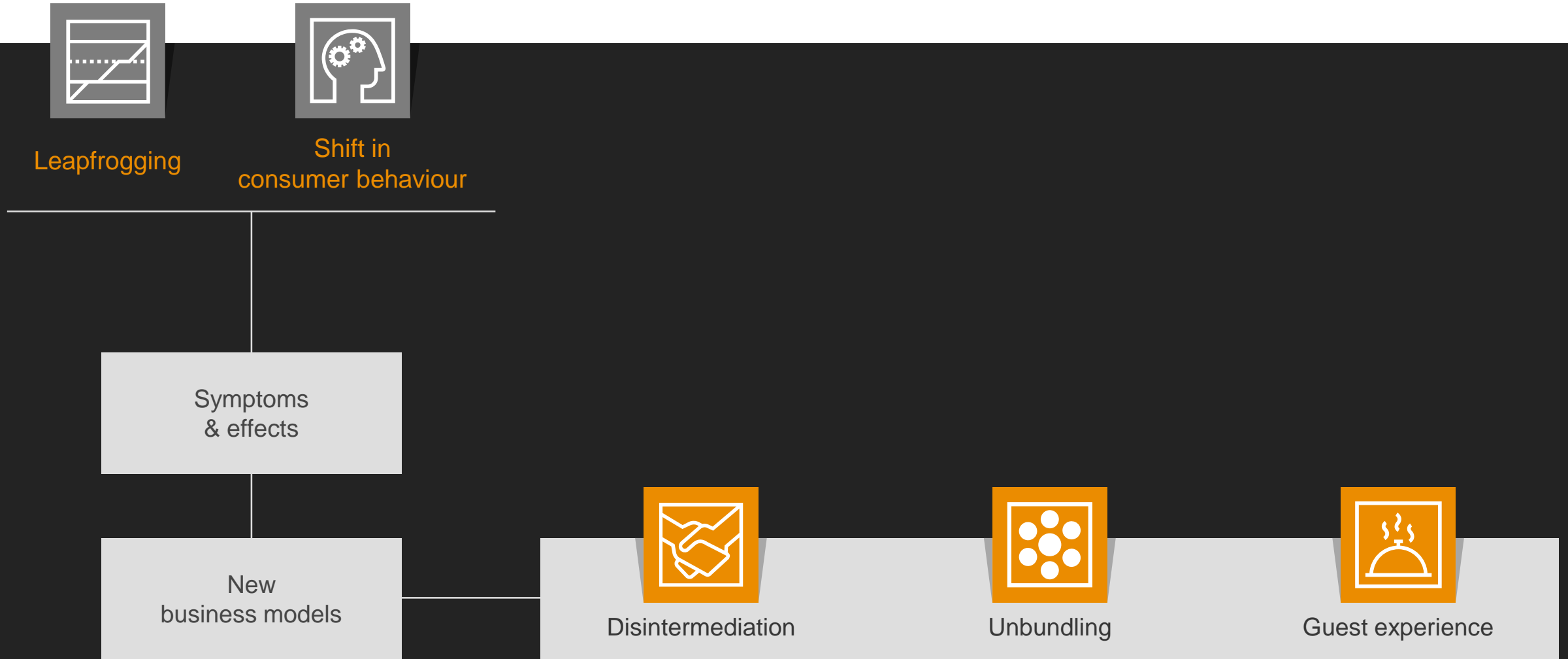


The **Freemium** Model

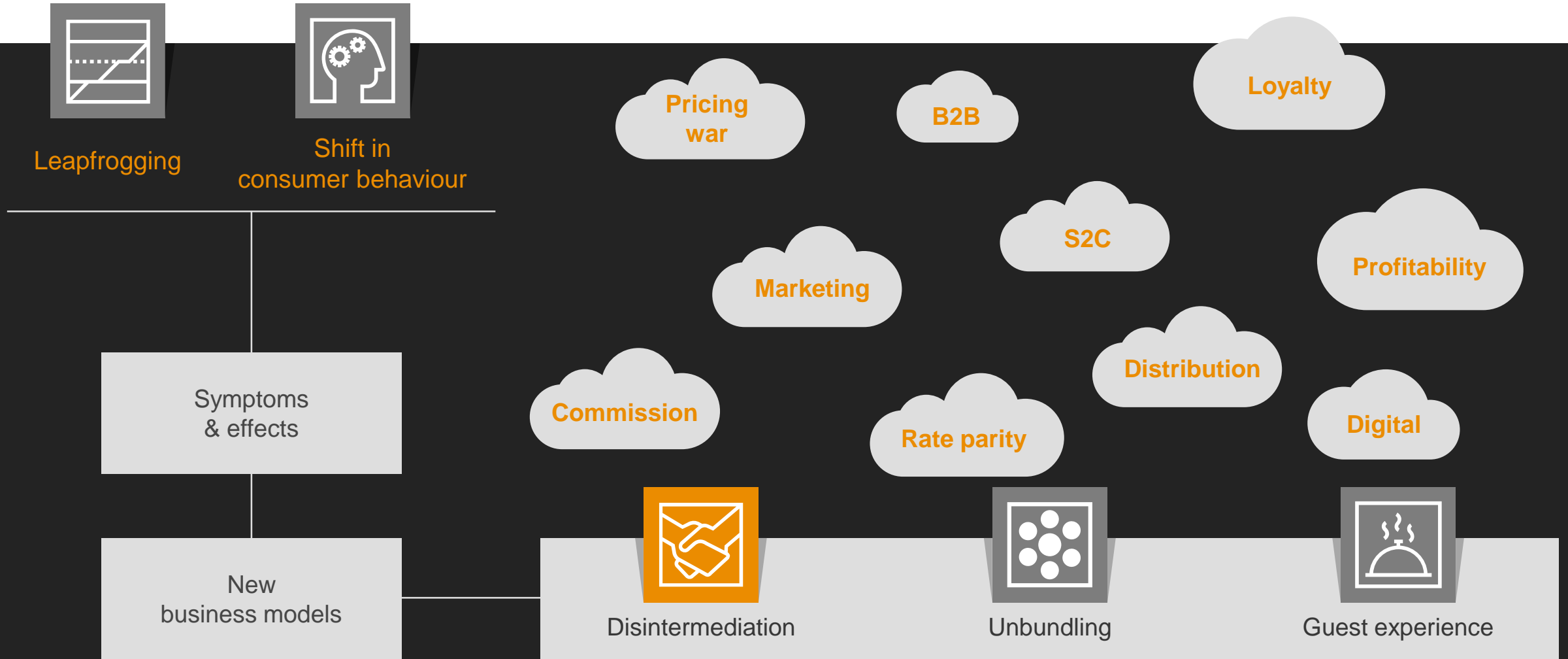


6 new business models that impact Tourism

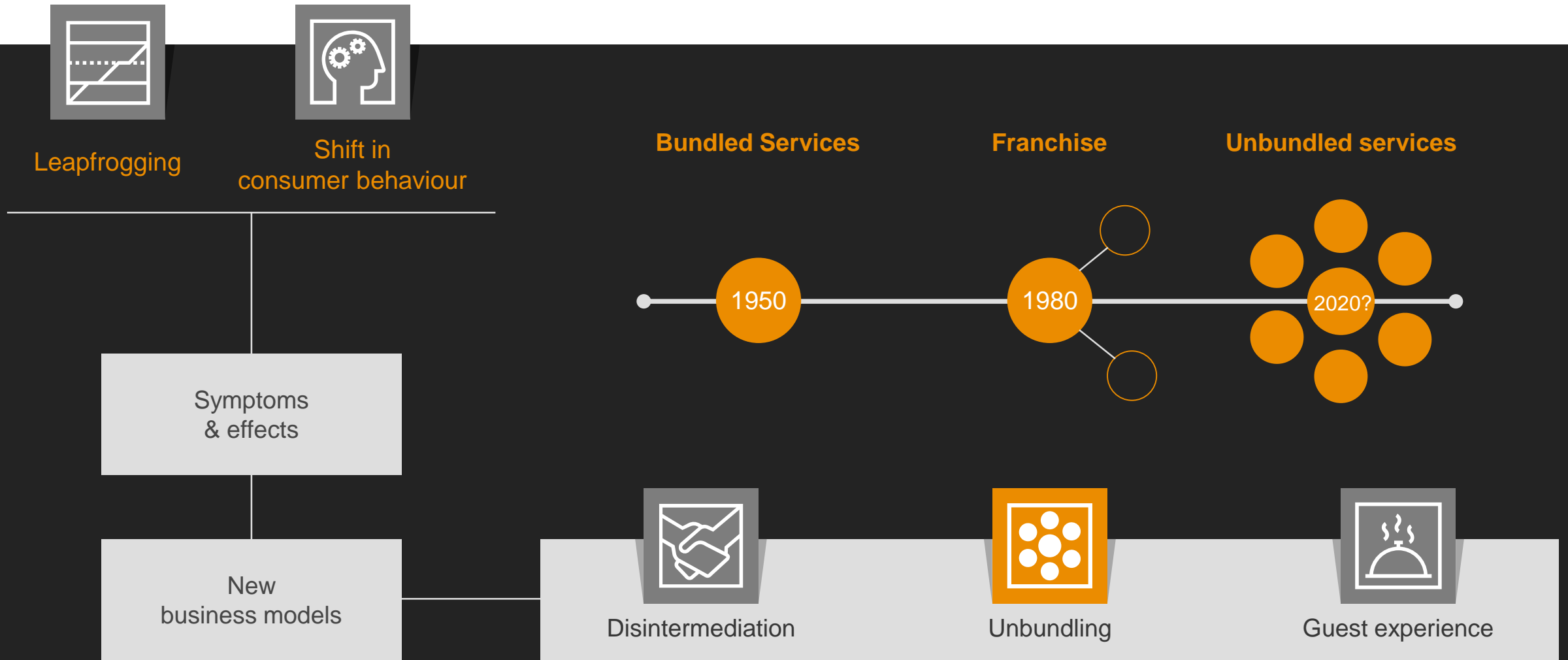
Megatrends will trigger new business models in Tourism



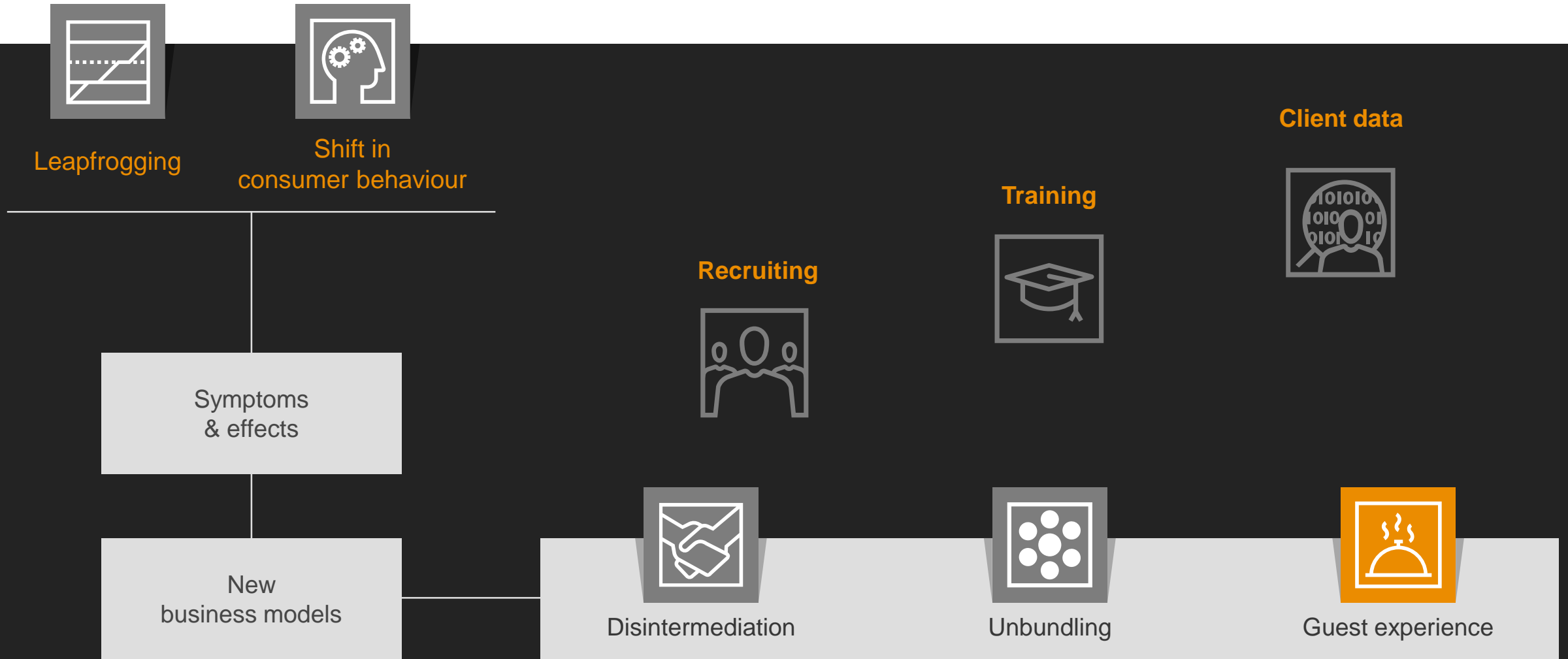
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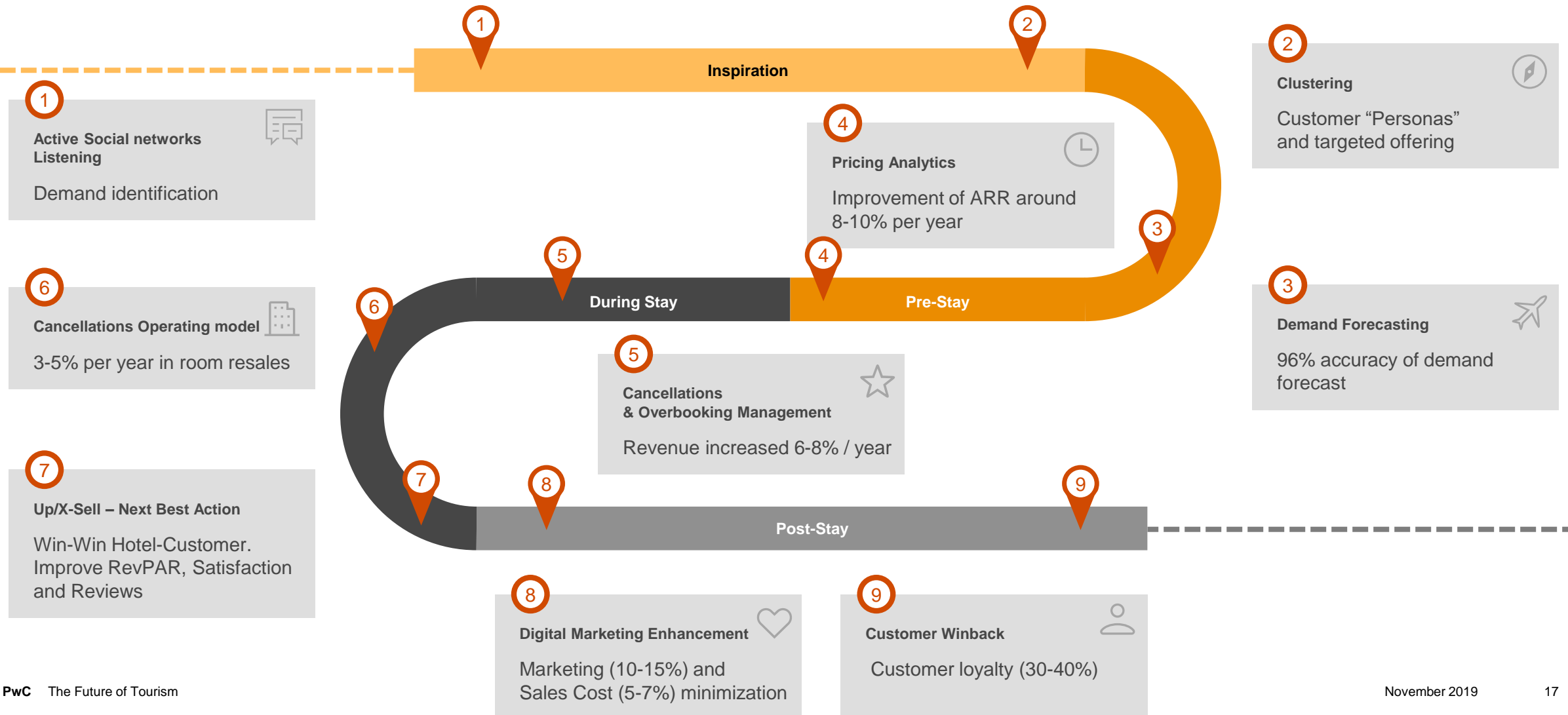
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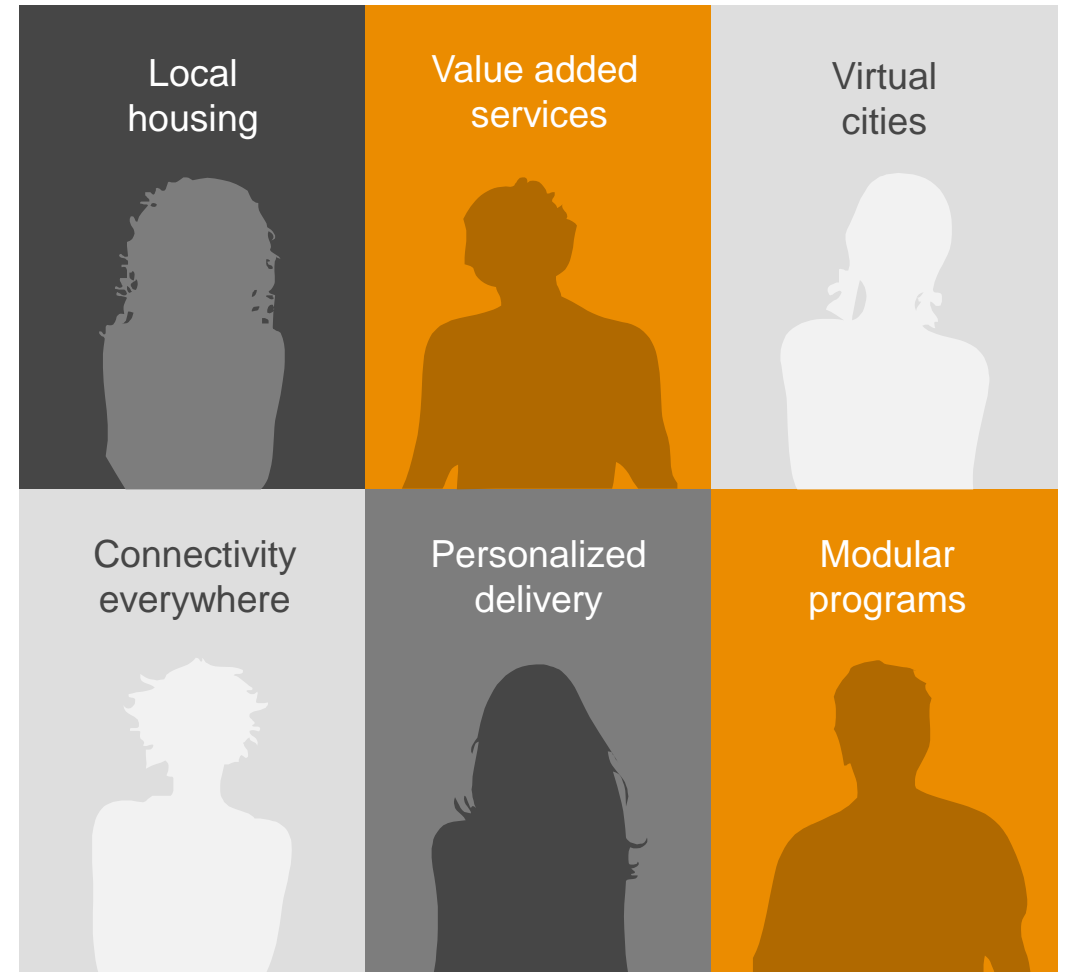
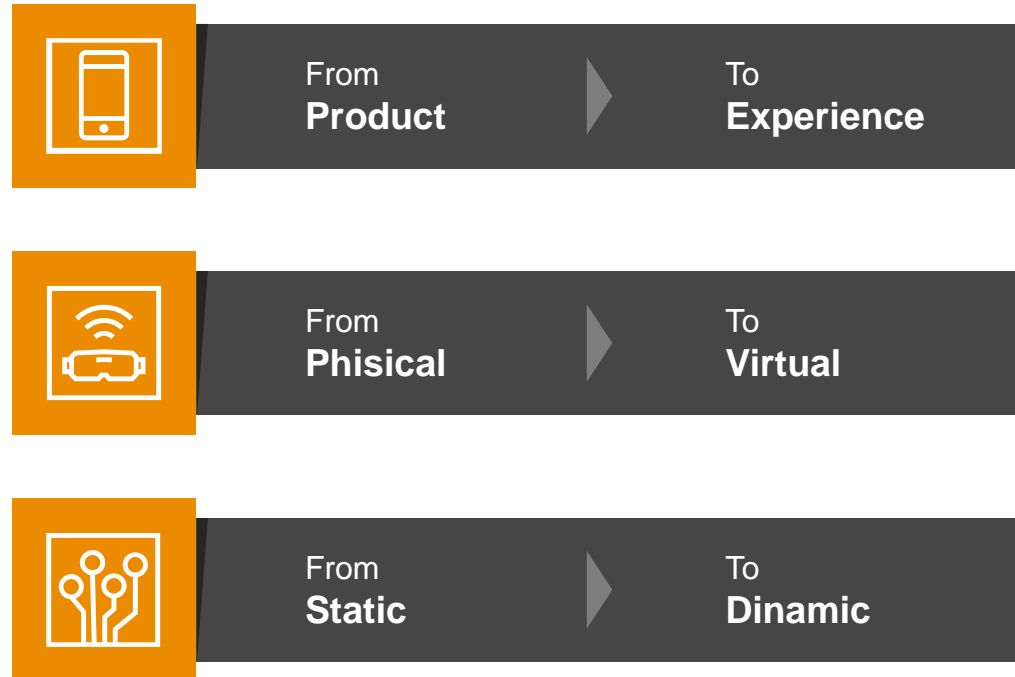
Megatrends will trigger new business models in Tourism



Data and analytics use cases impacting the Customer Journey



Consumer behaviour is changing



The golden agers are turning silver – and the Millennials are here

The Millennials are here – are we prepared?

Golden Agers

- Wealth Tourism
- Have time
- Are still agile
- Retired
- Some technical affinity – use internet
- “Classic travelers”
- Come to ‘see’ places
- Pre-organized group
- Looking for predictable experiences

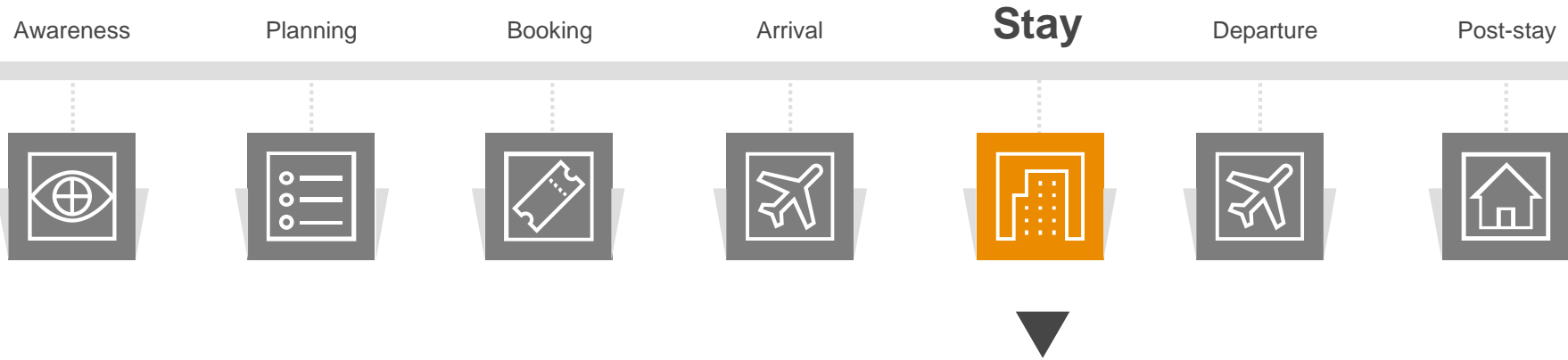
From product focus...

Millennials

- Born 1980 -1999 (20-30 now!)
- Well educated and informed
- High affinity for mobile technology
- Balance between work and leisure is more important
- Come to “experience” places
- Self-composed trips (e.g. Tripmee.com)
- Let others ‘real time’ participate in their experience
- Use social media as source

...to experience focus

Living the experience



AR in museums



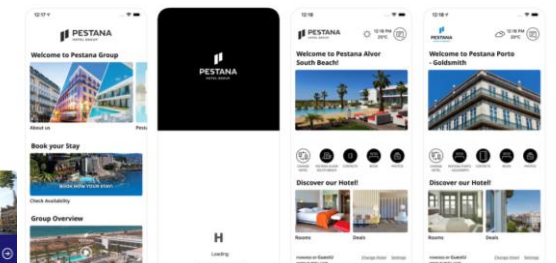
VR experiences



Motorbike sharing



City pass



Hotel app's

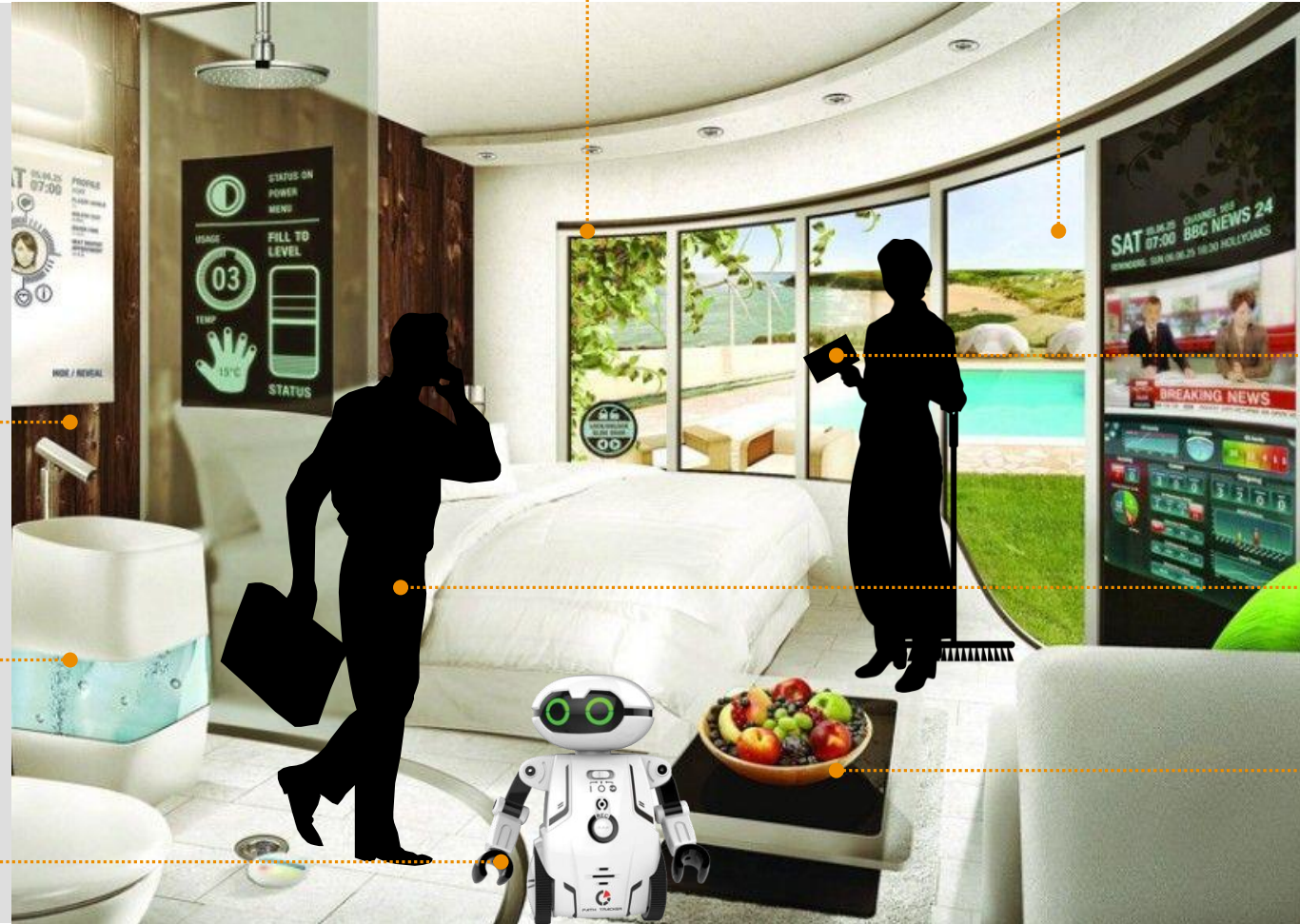
The room of the future

The tourist controls the experience

Smart mirrors. Bigger focus on fitness with equipment integration in rooms and personal smart devices

Efficient bathrooms with optimization of water usage

Usage of a steward robot



Open window recognition turning off Air Conditioning

Windows darken in case of bright light removing the need for curtains



Room key on phone / tablet/ face recognition

Smart Procurement

Check in and out via mobile phone and face recognition. Voice-control the entire room such as lights, Air, etc.

Local experiences with greater emphasis on local / seasonal flavors



FLY ZOO HOTEL
服务机器人

FLY
ZOO
HOTEL
服务机器人

4

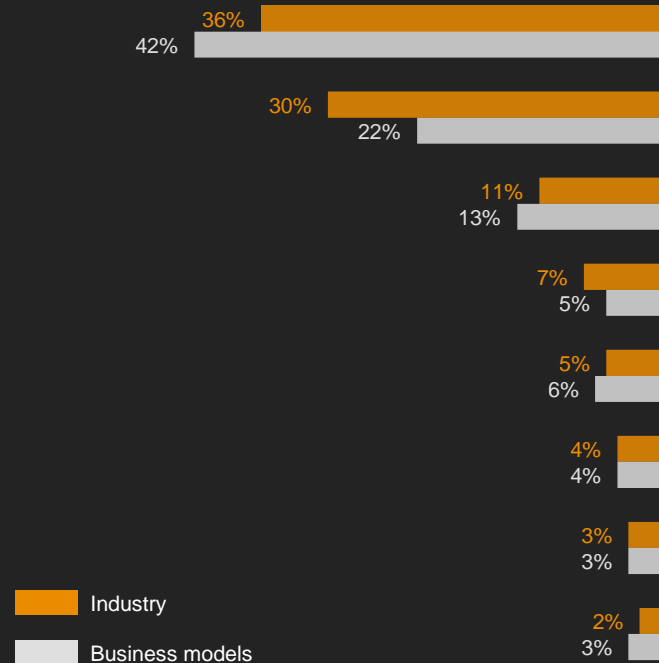
Final Thoughts



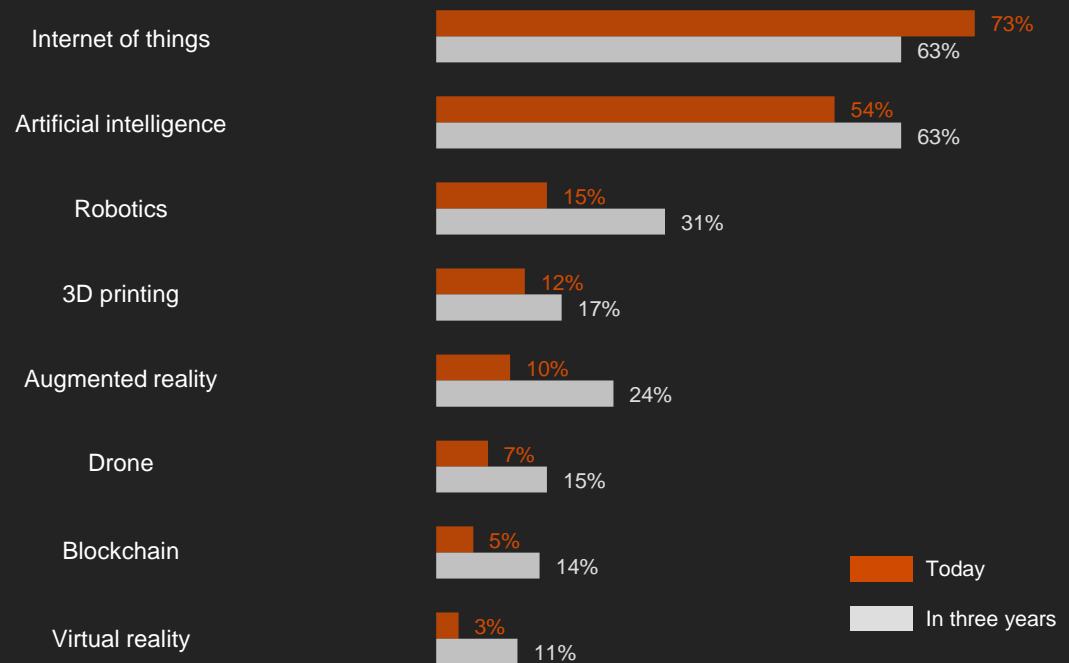
Digital strategy determines adoption

Investment levels for various technologies vary greatly by sector and business model

Disruptive technologies

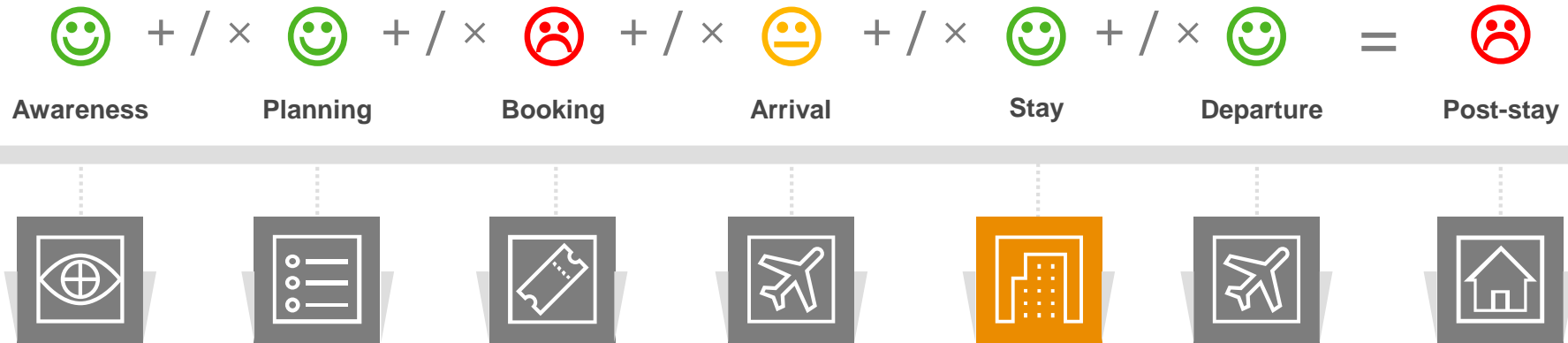


Investment made by organisations



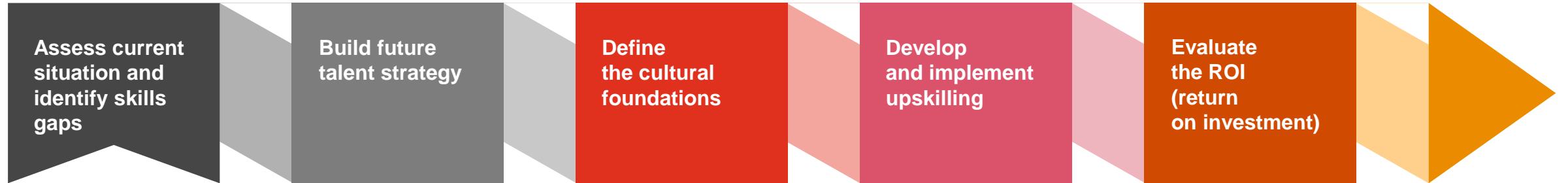
The 2020 traveller does not differentiate between service providers

Experience is affected in all stages of the trip



New world. New skills

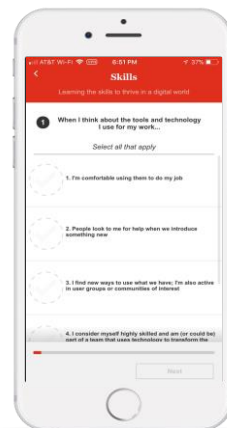
Assess and execute



Skills gaps, mismatches and role adjacencies



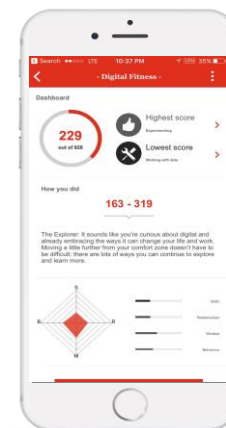
Assessment



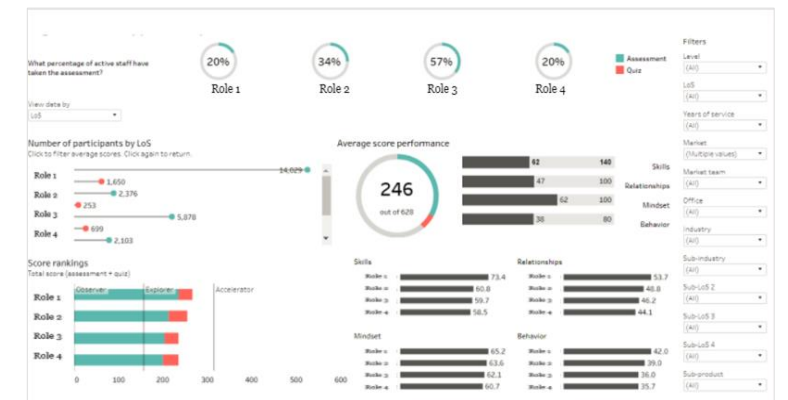
Training



Report



Performance Dashboard Reportable Org-wide Insights

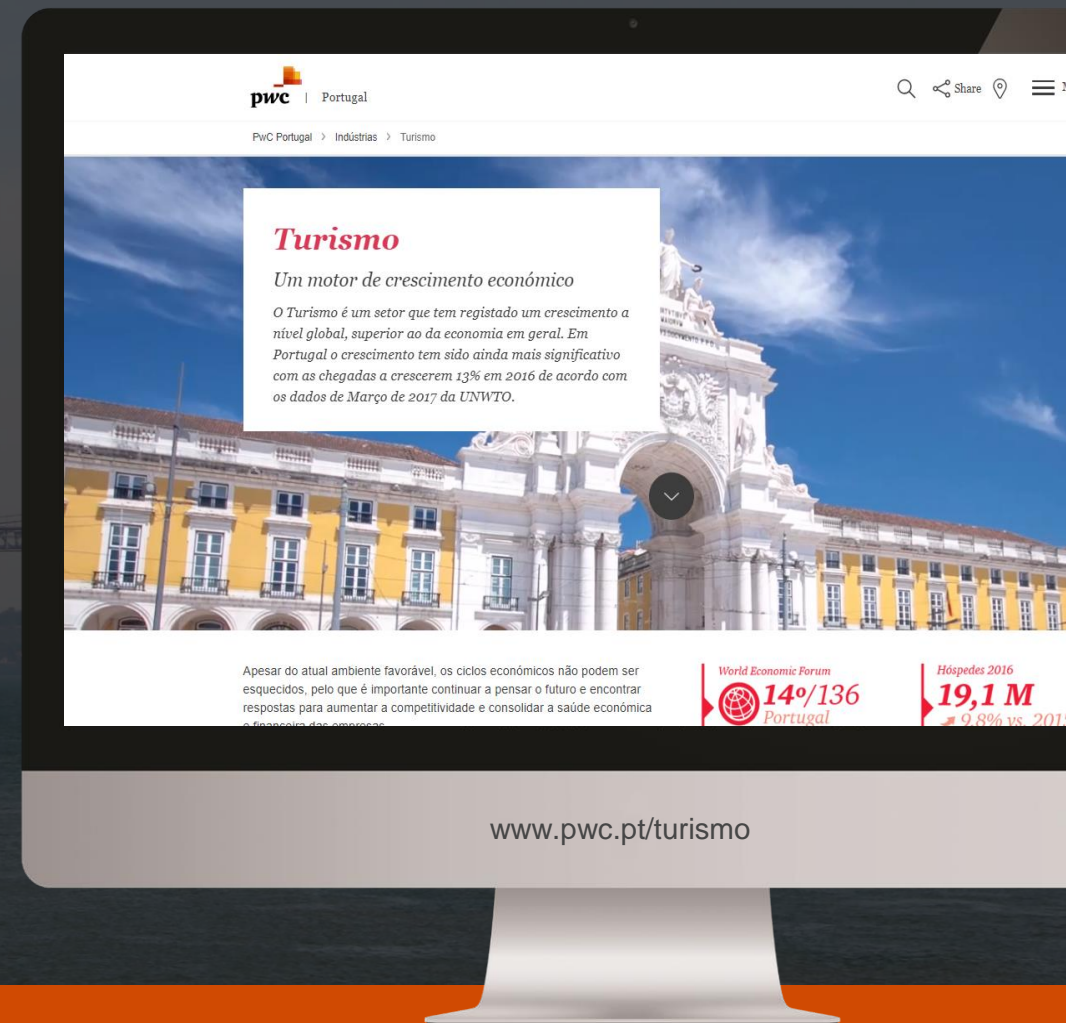


“To Be on the Tourist Shoes”



Obrigado

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