

**Centro de Portugal
Sustainable Tourism Observatory
(OTSCP)**



**Preliminary report of Centro de Portugal
Sustainable Tourism Observatory
(OTSCP)**

Focal area: Centro de Portugal NUTS II region

Centro de Portugal region, June 2023

**Preliminary report of Centro de Portugal Sustainable
Tourism Observatory (OTSCP)**

Focal area: Centro de Portugal NUTS II¹ region

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¹ NUTS (Nomenclature of Territorial Units for Statistics) is a hierarchical system used by Eurostat for dividing up the economic territory of the EU and the UK for the purpose of: the collection, development and harmonization of European regional statistics; for socio-economic analyses of the regions; and framing of EU regional policies. There are three levels of NUTS: NUTS I is for major socio-economic regions; NUTS II for basic regions for the application of regional policies; and NUTS III for small regions for specific diagnoses.

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EXECUTIVE SUMMARY

The Centro de Portugal Sustainable Tourism Observatory (OTSCP) is a management tool created in 2017 to measure and monitor tourism development and its sustainability in the Centro de Portugal region. Among its goals, the Observatory wants to play an important role in supporting the decision-making of all stakeholders in Centro de Portugal, at strategic and operational levels, providing valuable information to all companies and organizations, directly or indirectly linked to the tourism activity.

Centro de Portugal Sustainable Tourism Observatory emerged as a part of the national Tourism Strategy 2027 by the National Authority Turismo de Portugal. In the context of this tourism strategy, Turismo de Portugal defined concrete goals to promote the sustainable development of tourism, and therefore, created the +Sustainable Tourism Plan 20-23. Monitoring tourism activity is perceived in this plan as a valuable management tool for the destination, at national and regional level, to analyze the concrete impacts of tourism activity in Portugal, and guide decision makers. Therefore, the National Tourism Strategy has encouraged regional authorities to create regional tourism observatories: in Algarve, Alentejo, Centro, Azores, and North Regions.

Therefore, this Observatory emerged to provide the Centro de Portugal Regional Tourism Authority with a valuable management tool, which enables to identify and know, in real time, the evolution of tourism activity throughout the region, as well as the effective performance of the various sub sectors of tourism, in each of the one hundred municipalities that make up the Centro de Portugal region. The Observatory operates with a network structure, open to the collaboration of all entities from the Centro region. Its organizational model presupposes the collaboration of the business associations, through a Business Advisory Council (BAC), and of all the universities and polytechnics located in the Centro de Portugal region, represented in the Scientific Council (SC). This Observatory is articulated with the other national Observatories.

This knowledge will be instrumental in improving evidence-based decision making at the national, regional and local levels, in supporting the development of sustainable tourism and in the protection of the fragile natural resources that are the basis of tourism development.

The goal of this report is to present and describe the Centro de Portugal Sustainable Tourism Observatory, which aims to become a member of the International Network of Sustainable Tourism Observatories of UNWTO (INSTO).

In order to pursue these objectives, the document begins with a brief description of the Tourism industry in Portugal, its national plans and strategies to promote Portugal as a sustainable destination.

The second and third chapter are focused on Centro de Portugal region: the second chapter describes the region, its local competitiveness and development; the third chapter presents the tourism development in the Centro de Portugal region, its evolution, the regional strategy and how monitoring and sustainability have become priorities in the destination. The fourth section describes the current available tourism-related data in Portugal, which enables stakeholders to evaluate the sector's performance, and at the same time, it identifies the information gaps in Portugal, that ask for the emergence of other instruments that can give better insights into tourism reality i.e., regional tourism observatories. The document ends with a detailed presentation of the Centro de Portugal Sustainable Tourism Observatory, its goals, structure, regional working group, and methodology needed to operationalize the OTSCP.

1. Tourism Strategy in Portugal

1.1. Monitoring Tourism Activity

Tourism is an economic activity of strategic importance to Portugal's economic and social development (17.1% of GDP in 2019)², namely in what concerns exports growth and employment creation. Considering the full potential of resources and cultural heritage, tourism is becoming a valuable source of income to its inhabitants, which is certainly contributing to increase its competitiveness, at international, national and regional level.

Besides its positive impacts on the economy, the development of tourism in destinations may also have negative externalities in local communities and in the environment, increasing pollution, pressure on biodiversity and ecosystems and, in certain cases, causing conflicts among tourists and residents, by reducing the quality of life of residents. Sustainable tourism development is an absolute priority in tourism planning, where environmental and social problems are reduced and regularly monitored to promote a balance of tourism growth in the destination.

Local decision-makers and other tourism stakeholders are responsible for maximizing the positive effects of tourism, while at the same time reducing its negative externalities. This asks for a careful management, monitoring and planning of tourism development in tourism destinations, leading decision-makers constantly aligning their strategies with the outcomes taking place in the destination (the positive and negative impacts in the territory), and later positioning themselves according to sustainability values. Nonetheless, many tourism destinations do not monitor the evolution of tourism in their territories - at national and regional level -, and are therefore unaware of tourism's impacts,

² Available here: <https://wtcc.org/research/economic-impact>

which often leads to unsustainable decisions. Portugal, among many other destinations still lacks regional and local detailed information about the real impacts of tourism in its territory.

Tourism observatories are regional management tools used to collect information and monitor the evolution of tourism in destinations, guiding local decision-makers. Observatories are therefore crucial tools to guide local actors on promoting sustainable tourism development and should be part of regional and national tourism development plans. In this report, we aim to highlight the establishment of a tourism observatory in the Centro de Portugal region.

1.2. Tourism Strategy 2027

The importance given to monitoring the tourism activity in the Centro de Portugal region is following the National Tourism Strategy that the government launched in 2017, the Tourism Strategy 2027 (TS27), as a reference for formulating public policies and business strategies for the tourism industry. It is a 10-year strategy with the slogan “Leading the tourism of the future”. Leading the tourism of the future implies positioning Portugal as a cohesive, innovative and competitive sustainable destination, a country that appreciates work and people. A destination for tourism, investment, living and learning. Portugal wants to be known as an inclusive, open, and creative country and positioned as a travel and tourism specialized hub.

Through a web-based platform and regional discussion workshops, many tourism stakeholders from across the country engaged in the open and participatory strategy. The Tourism Strategy 2027 outlines Portugal’s vision for tourism for the next decade:

To place Portugal as one of the world’s most competitive and sustainable tourist destinations by establishing tourism as a major driver of economic, social, and environmental development throughout the country.

In terms of **key tourism policy priorities**, this vision represents a broader perspective aligned with the United Nations’ Sustainable Development Goals (SDGs):

- Portugal, Sustainable Destination, where tourism development is based on the preservation and conservation of the country’s natural and cultural heritage (SDG 13).
- Portugal, Cohesive Territory, where tourism demand reaches all regions in a more balanced way (SDG 10).
- Portugal, Innovative and Competitive Destination, making Portugal a more innovative and international competitive country (SDG 9).

- Portugal, Destination Where Work Is Valued, a country that invests in people, in their qualifications, values professionals and attracts talent (SDG's 8 and 10).
- Portugal, Destination To Visit, But Also To Invest, To Live And To Study, a country that attracts tourists, but also investment. A country to live in, study in, invest in and establish companies in (SDG 12).
- Portugal, Inclusive Country, Open and Connected to the World, a tourism destination “for all”, open to the world, tech, and connected to “the old” and to “new” worlds (SGD 16).

Portugal's tourist industry long-term development will be guided by the Tourism Strategy 2027. A certain amount of flexibility is needed when planning on a 10-year basis to prevent a strategic document from being out of date and inadequate. In this situation, the Tourism Strategy 2027 will be put into effect through numerous programs and projects that combine long-term planning with immediate action.

The Tourism Strategy 2027 is based on **five strategic pillars**, placing people at the center of the industry's approach to tourism:

- **Value the territory** - using historical and cultural heritage and preserving its authenticity; promoting urban regeneration; improving product development to better match consumer needs; protecting natural and rural resources; promoting the importance of tourism in terms of maritime economy.
- **Boost Economy** – promoting the competitiveness of tourism businesses, through simplification, and reduction of bureaucracy; attracting investment; developing the circular economy; fostering entrepreneurship and innovation.
- **Promote Knowledge** - improving the skills and image of careers in tourism; promoting the training of human resources; promoting continuous qualification of entrepreneurs as managers; dissemination of knowledge and tourism data and research; promoting a smart destination strategy for tourism destinations in Portugal.
- **Generate Networks and Connectivity** – improving air accessibility to the destination; developing mobility within the destination; promoting “tourism for all” from an inclusive point of view; involving society in the process of tourism planning and co-creation; promoting networks and cooperation between tourism stakeholders.
- **Highlight Portugal** – improving Portugal's positioning as a destination to visit, to invest, to live and to study in; fostering the domestic market; promoting Portugal as a destination of congresses and events and for studying; promoting the internationalization of tourism businesses.

This vision demonstrates a clear desire to lead internationally in this field and a compromise with the three pillars of sustainable development. As a top tourist destination, Portugal places people at the center of its strategy and builds its competitive advantage on the principles of sustainability, a diverse offering, and valuing its distinctive and innovative assets.

Leading tourism of the future does not mean being first in the rankings; rather, it means promoting the destination's integrated development and being an international reference in that area. The strategic document also makes clear that there are social issues that need to be addressed. Two of the major obstacles are maintaining social and territorial cohesion and improving the public's perception of careers in tourism. The Tourism Strategy for 2027 identifies the **challenges** that Portugal's tourism industry will face over the next ten years:

- Employment – Promoting employment, qualification and valorization of people and to increase tourism professionals' income / wages.
- Cohesion – extending tourist activity to the entire territory.
- Growth in value – higher growth rate in revenues than in demand.
- Seasonality – extending tourism activity all year long, so that tourism is sustainable.
- Accessibility – Ensuring the accessibility to Portugal as a destination and promoting mobility within the territory.
- Demand – reaching markets that better respond to the challenges of growth in value and that allow to extend tourism all year long and throughout the territory.
- Innovation – Stimulating innovation and entrepreneurship.
- Sustainability – Ensuring the preservation and sustainable economic valorization of the cultural and natural heritage.
- Simplification – Simplifying legislation and making administration more agile.
- Investment – ensuring financial resources and boosting investment.

In addition to these challenges, each of the three pillars of sustainability outlined specific objectives. Portugal's economic plan goal for the country's total overnight stays is to reach 80 million by 2027, which would double tourism revenue at the same time and increase tourist demand throughout the country.

In what concerns social issues, seasonality is viewed as the greatest threat to employment, so extending tourism activities throughout the year and lowering the seasonality rate from 37.5% to 33.5% are the main objectives. Still on a social level, the strategy aims to double the number of tourism-related secondary and post-secondary education qualifications and ensure that 90% of people who live in tourist areas think tourism is good for their area. Finally, the environmental plan

aims to implement effective energy, water, and waste management strategies in nine out of ten businesses nationwide.

After the action plan for achieving these goals is put into action, an effort will be made to monitor the sustainability goals, allowing the policies evaluation, and offering the private sector the necessary tools to make appropriate decisions.

Considering this, Turismo de Portugal has been working on a set of initiatives that are in line with this strategy. These initiatives have the potential to make a significant contribution to a better measurement of sustainability as well as to the promotion of brand-new regional observation units that can assist in the proper management of tourism destinations, like we will see in the next subsection.

Turismo de Portugal took part in the celebration of the International Year of Sustainable Tourism for Development in 2017, organized by UNWTO and United Nations, where a set of actions to promote tourism in five key areas were defined. The five key areas were:

- Inclusive and sustainable economic growth.
- Social inclusion, employment and poverty reduction.
- Resource efficiency, environment protection and climate change.
- Cultural values, diversity and heritage.
- Mutual understanding, peace and security.

1.3. +Sustainable Tourism Plan 20-23

The Covid-19 pandemic has changed the dynamics of societies and offered an opportunity to rethink the position of the Tourism sector, especially in terms of its relationship with the territory and the communities, focusing on an increased contribution to the achievement of the SDGs.

Turismo de Portugal developed the **+Sustainable Tourism Plan 20-23**, reinforcing the commitments in line with the Tourism Strategy 2027 and setting the strategy to position Portugal as one of the world's most sustainable, competitive, and safe tourist destinations.

The **+Sustainable Tourism Plan 20-23 sets 5 principles**, which are:

1. To contribute to the achievement of the goals set by the Tourism Strategy 2027.
2. To strengthen the role of Tourism in the 17 United Nations' SDGs.
3. To promote the energy transition and the circular economy of tourism companies.

4. To involve the stakeholders in a joint commitment to transform supply and sustainability of the destination.
5. To stimulate a change of attitude throughout the sector's value chain.

Aligned with the previous principles, the Plan includes 119 actions proposed by Turismo de Portugal and through the contributions of public consultation. The 119 actions are distributed by the **4 axes of action**, which are:

- **AXIS I** - Structure an increasingly sustainable supply - 11 areas and 80 actions.
- **AXIS II** - Qualify tourism professionals - 1 area and 17 actions.
- **AXIS III** - Promote Portugal as a sustainable destination - 3 areas and 13 actions.
- **AXIS IV** - Monitor sustainability metrics in Tourism - 2 areas and 9 actions.

The +Sustainable Tourism Plan 20-23 is one of the measures of the **Reactive Tourism | Build the Future Plan, Pillar 4 “Build the Future – Sustainability in companies and destinations”**, approved by the national government after the pandemic to recover the tourism activity in Portugal. Moreover, the **Reactive Tourism | Build the Future Plan** aims to prepare and fund the future of the tourism activity, by equipping it with mechanisms to make it more responsible, more sustainable, and more resilient. Therefore, this plan considers three priority dimensions of action for tourism stakeholders: resilience, climate transition and digital transition. Several projects and plans, are being created to promote the digital and climate transition of tourism, using the best technological solutions available. Among them, smart destination management is being addressed, including smart monitoring systems to gather tourism information. For instance, the mobile tracking of tourist flows, which will provide real-time information on how visitors are distributed throughout the territory, the time they stay in each place, the places visited, as well as calculating their carbon footprint, among many other useful data related to tourist mobility.

Monitoring tourism sustainability in Portugal is therefore one of the axes of action of the National Tourism Strategy of Turismo de Portugal and of the national government, which has motivated the creation of Travel BI, an online platform that aggregates and collects information at national and regional level (further described in chapter 4). Moreover, to measure tourism activity at regional and local levels, Turismo de Portugal has encouraged regional authorities to create regional smart tourism observatories. In Portugal, 5 regional tourism observatories have been established:

- Centro de Portugal Sustainable Tourism Observatory (OTSCP) (established in 2017).
- Porto and North Sustainable Tourism Observatory (established in 2022).
- Alentejo Sustainable Tourism Observatory (already a member of INSTO).

- Azores Sustainable Tourism Observatory (already a member of INSTO).
- Algarve Sustainable Tourism Observatory (already a member of INSTO).

In this report we aim to highlight the establishment of the Centro de Portugal Sustainable Tourism Observatory (OTSCP) in the Centro de Portugal region, who aims now to become part of the International Network Sustainable Tourism Observatories (INSTO) of UNWTO. We will start by describing the Centro region in the next chapter.

2. Centro de Portugal region - description and background

2.1. Region description

The Centro de Portugal region occupies 28,462 km² and has about 2.2 million inhabitants, constituting approximately 30.6% of the total area of Portugal and 22% of the country's resident population (Censos 2021)³. It is bordered to the north by the North region, to the east by Spain, to the south by the Alentejo, to the southwest by the Lisbon region and to the west by the Atlantic Ocean. Its location in the central part of Portugal gives it a strategic position since it is situated between the most important national urban centers: Lisbon and Porto. Its vast territorial coverage makes it the most diverse region in the country, comprising eight sub-regions (NUTS III) or CIMS⁴: Aveiro region, Beira Baixa, Beiras and Serra da Estrela, Coimbra region, Leiria region, Médio Tejo, Oeste region and Viseu Dão Lafões. These eight sub-regions cover a total of 100 municipalities and 972 parishes (Figure 1).

Considering the population dynamics, the region has a low population density, and it is characterized by the depopulation of the inland areas in contrast to the coastal areas, which are more populated and urbanized (municipalities of Coimbra, Leiria and Aveiro have the largest number of inhabitants). The regional economy is much diversified, with the tertiary sector contributing the most to the regional gross value. The secondary sector also plays a very relevant role in the regional economy and the primary sector contributes the least.

According to the Köppen-Geiger climate classification, the region has predominantly a warm summer Mediterranean climate. The lowest temperatures occur in the mountains in the interior of the region in winter, where they can fall below -10 °C, particularly in the highest peaks of Serra da Estrela.

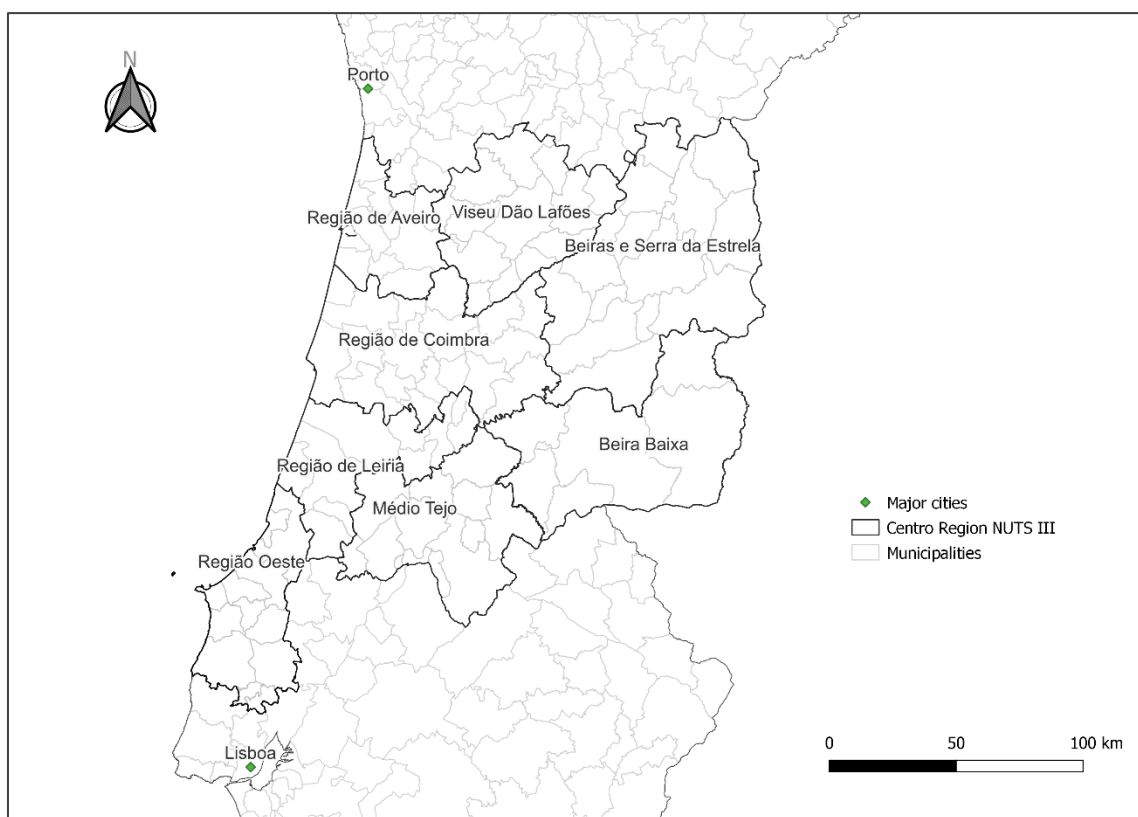
³ Source:

https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publicacoes&PUBLICACOESpub_boui=65586079&PUBLICACOE_Smodo=2

⁴ CIMS or Intermunicipal communities are free associations of municipalities, through the creation of a higher sub-regional entity (supramunicipal), to which the associated municipalities delegate part of the functions or competencies conferred on them by law, with the aim of providing services to all of them, aiming, above all, to solve common problems and that, therefore, are of transmunicipal geographical scope.

Summers in the Centro Region are mild in the highlands and in the coastal region. Its climate is therefore very attractive to tourism and leisure activities.

Figure 1 - NUTS III or sub-regions of Centro de Portugal region



Data from: Carta Administrativa Oficial de Portugal (<https://www.dgterritorio.gov.pt/>)

The Centro region is very rich in natural and cultural heritage, full of deep contrasts, from the sea on the Atlantic coast to the mountains in the interior and from the large cities to the traditional villages. It is a land of contrasts offering unique landscapes of sea and mountain, unique Enogastronomic experiences and an unequalled cultural heritage. The tourism supply in the Centro region will be further detailed in the following chapter.

2.2. Centro de Portugal Regional Competitiveness Index (RCI)⁵

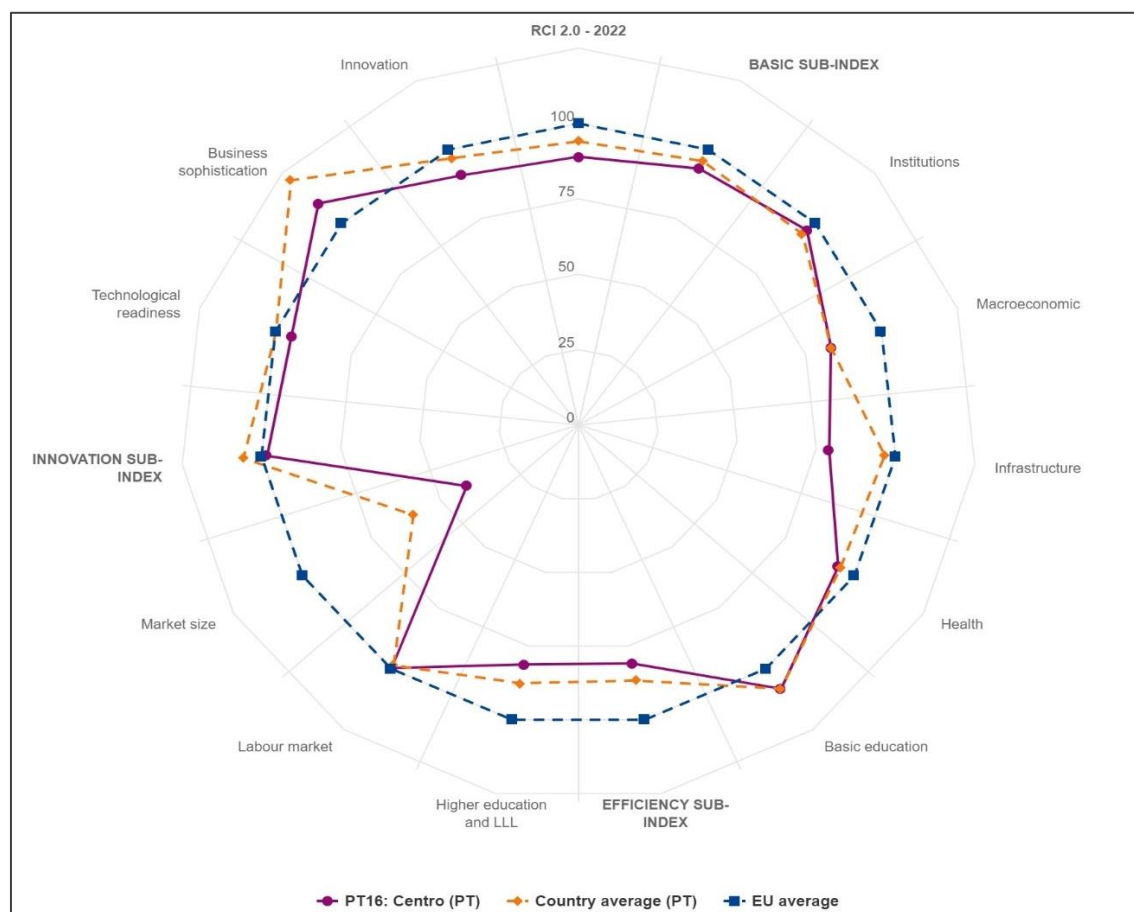
The RCI provides a European perspective on the competitiveness of all NUTS II regions in the EU. “Regional competitiveness is the ability of a region to offer an attractive and sustainable environment

⁵ According to European Regional Competitiveness Index (RCI) (https://ec.europa.eu/regional_policy/information-sources/maps/regional-competitiveness_en) it is possible to monitor and assess regions' development and compare them with other regions, in terms of GDP per capita and stage of development.

for firms and residents to live and work” (*European Regional Competitive Index*), thus extending the traditional analysis of competitiveness from a purely economic measure, to incorporate human capital and quality of institutions indicators. It also considers the level of development of a region by shifting the emphasis from more basic issues to innovation related factors.

The RCI is composed of 11 pillars that describe the different aspects of competitiveness and are classified into three groups: Basic, Efficiency and Innovation. The Basic group represents the key basic drivers of all types of economies and includes five pillars: (1) Institutions; (2) Macroeconomic Stability; (3) Infrastructures; (4) Health; and (5) Basic Education. The Efficiency group, related to a more skilled labor force and a more efficient labor market, includes three pillars: (6) Higher Education, Training and Lifelong Learning; (7) Labor Market Efficiency; and (8) Market Size. The Innovation group represents the drivers of improvement that contribute to the most advanced stage of economic development, which include three pillars: (9) Technological Readiness; (10) Business Sophistication and (11) Innovation. Centro de Portugal RCI (2022) spider-graph (Figure 2) shows a score of 89 (on a scale 0-100), Portugal 94.1 and EU average is 100.00. The stage of development is “less developed region”.

Figure 2 - RCI 2022 - Centro de Portugal average vs Portugal average vs RCI EU Average



Data from: https://ec.europa.eu/regional_policy/assets/regional-competitiveness/index.html#/

This information is intended to help the Centro de Portugal region identify its strengths, its weaknesses and investment priorities when shaping its development strategies. In the spider-graph (Figure 2) it is possible to benchmark the Centro de Portugal region with Portugal and the European average. The index provides indications of what the region should focus on, considering its specific situation and its level of development.

The previous spider-graph (Figure 2) shows several gaps and variation in regional/national/EU competitiveness. These numbers should create awareness on to what extent these gaps are harmful for regional/national competitiveness, and which strategies should be adopted to reduce this internal variation. The Centro de Portugal **Basic Dimension** indicator “**Basic Education**” scores for instance greater than the EU average (Centro de Portugal 108.02 vs EU 100.00). On the other hand, the **Basic Dimension** indicator “**Infrastructure**” scores lower than the EU average (Centro de Portugal 79.1 vs EU 100.00), followed by several other below the EU average.

2.3. Centro de Portugal Barometer⁶

The Centro Regional Coordination and Development Commission (CCDR-C) is the State agency that coordinates environmental policies, spatial planning, cities, and the overall development of this region, supporting local governments and associations. This agency considers the importance of monitoring the progress of the region in its whole, comparing it with the other regions of the country.

The Centro de Portugal Barometer, from the CCDR-C, aims to monitor the progress achieved by the Centro de Portugal region, its development and competitiveness, in line with the strategy defined in the Regional Action Plan for the period 2014-2020. It incorporates five dimensions of analysis considered relevant for the region, which are (1) Growth and Competitiveness; (2) Human Potential; (3) Quality of Life; (4) Cohesion and (5) Environmental and Energy Sustainability. Even though these areas are not specific to evaluate the impacts of the tourism activity in the region, but rather the development, the competitiveness and sustainability of the region as a whole, some of the dimensions analyzed in this Barometer are in line with the goals of the Observatory presented in this report and with the INSTO network issue areas.

Within these five dimensions of analysis, the Barometer defined a set of 25 indicators, which are:

- **Growth and Competitiveness (9 indicators):** Exports of goods; Foreign direct investment; Investment in Research and Development; Regional Innovation Scoreboard; Doctorates;

⁶ CCDR-C - Barómetro Centro de Portugal, November 2022
http://ccdr.pt/index.php?searchword=bar%C3%B3metro&searchphrase=all&Itemid=46&option=com_search

Gazelle Companies; Net Creation of Companies; Gross Domestic Product and Work Productivity.

- **Human Potential (7 indicators):** Early school leaving; Young population with higher education; Results of national exams; Lifelong training; Resident population; Unemployment rate and Youth unemployment rate.
- **Quality of Life (2 indicators):** Resident satisfaction (linked to the Observatory's monitoring issue area, may be used for comparison studies) and Gross Domestic Product per inhabitant.
- **Cohesion (4 indicators):** Beneficiaries of the Social Income of Insertion; Income distribution; Dispersion of population variation and Dispersion of family income.
- **Environmental and Energy Sustainability (3 indicators):** Renewable energies; Emission of greenhouse gasses and Energy efficiency (in the whole region, the amount of electric energy consumed in the Region produced through renewable energy).

This monitoring system includes a set of key indicators with some targets defined, which are monitored periodically, allowing to identify trends, gaps of progress and any corrective actions and preventive measures to be developed.

The Centro de Portugal Barometer also aims to monitor the evolution of the region from a perspective of global success. This way, it is calculated a global assessment indicator for the Centro region that allows a synthetic and immediate reading of the relative behavior compared with the other Portuguese regions, as shown in Figure 3.

Figure 3 - Relative positions of NUTS II regions of Portugal in the global indicator of evaluation, by dimensions in November 2022

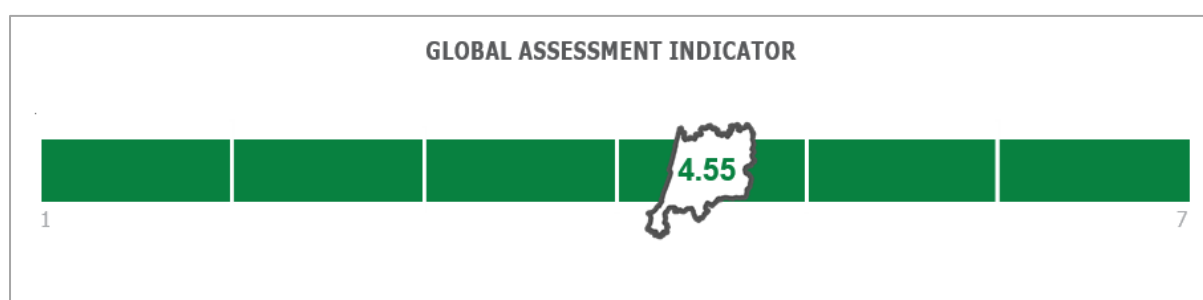
Relative positions of NUTS II regions in the global indicator of evaluation, by dimensions		Global Indicator*	Growth and Competitiveness	Human Potential	Quality of Life	Cohesion	Environmental and Energy Sustainability
	Norte	2 ^a	2 ^a	3 ^a	7 ^a	2 ^a	1 ^a
	CENTRO	3^a	3^a	2^a	5^a	6^a	5^a
	AM Lisboa	1 ^a	1 ^a	1 ^a	1 ^a	3 ^a	6 ^a
	Alentejo	4 ^a	4 ^a	4 ^a	3 ^a	1 ^a	7 ^a
	Algarve	5 ^a	5 ^a	6 ^a	2 ^a	4 ^a	3 ^a
	Açores	6 ^a	6 ^a	5 ^a	6 ^a	7 ^a	2 ^a
	Madeira	7 ^a	7 ^a	7 ^a	4 ^a	5 ^a	4 ^a

* Indicators for which there were no values for all NUTS II regions were not included, namely "growth of foreign direct investment" and "resident satisfaction indicator".

Data from: CCDRC barometer November 2022

The Global Assessment Indicator for the Centro region, shown in Figure 4, was calculated based on the matrix of the 25 indicators, indicated previously. Each of the barometer indicators was assigned a score from 1 to 7 by linear interpolation, considering the maximum and minimum values recorded by the NUTS II regions per indicator: 7 in the case of the region being the best, 1 in the case of the region having the worst performance. The results of the global indicator are disaggregated by the five dimensions of analysis, and it is updated annually.

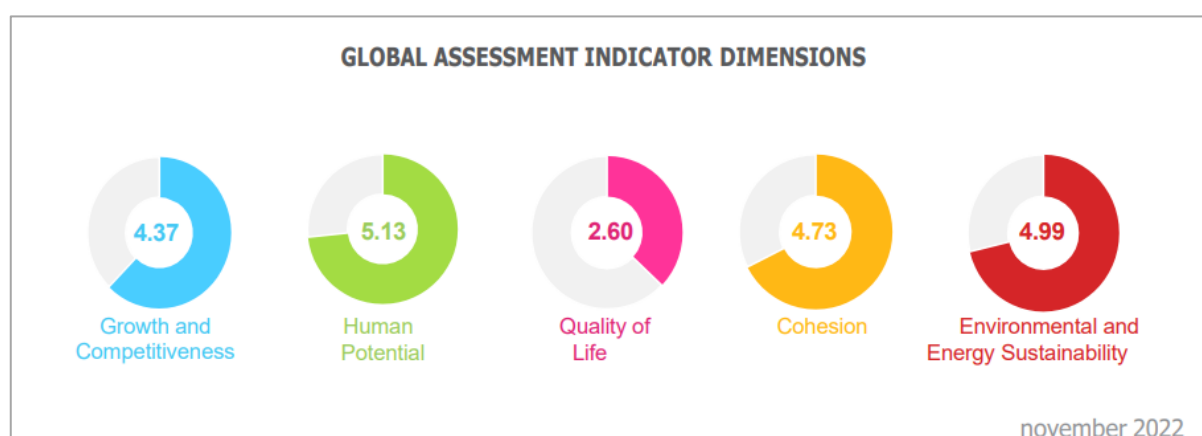
Figure 4 - Global Assessment Indicator of Centro de Portugal region in November 2022



Data from: CCDRC barometer November 2022

In addition to this synthetic index, aggregated values are also provided for each of its five dimensions: growth and competitiveness, human potential, quality of life, cohesion, and environmental and energy sustainability, as indicated in Figure 5.

Figure 5 - Global Assessment Indicator Dimensions of Centro de Portugal region in November 2022



Data from: CCDRC barometer November 2022

This barometer is therefore an important regional management tool to better understand the progress and development of the region. Nonetheless, sector-specific monitoring with a variety of specific indicators is of great importance to the region, to better understand the impact of different sectors in the territory, their competitiveness, and their sustainability.

Since tourism has a significant contribution to the Portuguese GDP (17.1% in 2019)⁷ and therefore to the Centro region, monitoring tourism activity is essential to better understand the positive and negative impacts of tourism in this region. That is why the Turismo Centro de Portugal Regional Authority has created the Centro de Portugal Sustainable Tourism Observatory in 2017. The Observatory will be presented in the next chapter.

3. Tourism industry in Centro de Portugal region

3.1. Centro de Portugal Tourism Destination

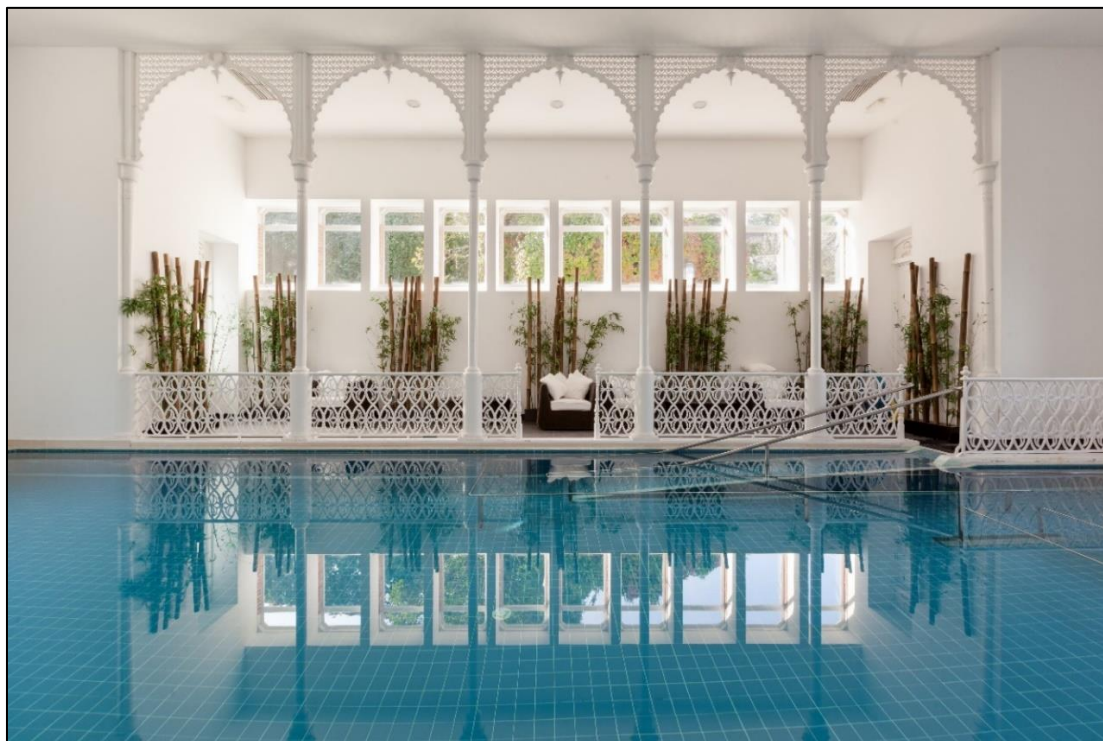
The reality of tourism in the Centro de Portugal region is very complex due to the combination of different factors:

- 1. A destination with a vast territorial dimension:** with a vast area of 28.000 Km², the Centro de Portugal region corresponds to 30% of the national territory, being the largest of the seven Portuguese NUTS II; it covers a total of 100 municipalities (32% of the 308 existing in Portugal) and covers such a diverse territory that includes a vast Atlantic coastline of about 250 km (from Ovar, in the north, to Torres Vedras in the south), an extensive area bordering Spain in the east (between the rivers Douro and Tejo), a large number of urban centers and several mountain ranges. This vast territory is very heterogeneous from an orographic, climatic, historical, and cultural point of view.
- 2. Diversity of tourism products and resources:** the geographical and cultural diversity is naturally embodied in a great number of endogenous resources, which are the basis for the development of numerous niche tourism products with enormous development potential, namely:

⁷ Source: <https://wtcc.org/research/economic-impact>.

- Health and Wellness Tourism: Tourism related to health (disease prevention and cure), body wellness, spiritual wellness (fighting stress), and related to nature, to take advantage of the Centro's abundant natural resources (Figure 6).⁸

Figura 6 – Piscina Eiffel nas termas de Luso



Source: Turismo Centro de Portugal

- Village Tourism: tourism anchored by three collaborative networks of villages that aim to enhance endogenous resources and cultural heritage (Figure 7).⁹

⁸ The products offered include: Thermal Spa of Monte Real - Leiria; Curia Thermal Spa - Anadia; Ladeira de Envendos Thermal Spa - Mação; Piedade Thermal Spa - Alcobaça; Caldas da Felgueira Thermal Spa - Canas de Senhorim; Caldas da Rainha Thermal Spa; Termas de Águas - Penamacor; Alcafache Thermal Spa - Viseu; Almeida Thermal Spa - Fonte Santa; Longroiva thermal station - Mêda; Manteigas thermal station; Monfortinho thermal station - Idanha-a-Nova; Sangemil thermal station - Tondela; São Pedro do Sul thermal station; Unhais da Serra thermal station - Covilhã; Vale da Mó thermal station - Anadia; Bicanho thermal station - Soure; Carvalhal thermal station - Castro Daire; Cró thermal station - Sabugal; Luso thermal station - Mealhada.

⁹ The products offered include: the Network of Historical Villages of Portugal, which includes 12 villages, the Network of Schist Villages, which includes 27 villages and the Network of Mountain Villages, which brings together 41 villages in the Serra da Estrela region.

- Surfing tourism and other sports, tourism related with many excellent surf spots in Centro region (Figure 8).¹⁰
- Nature Tourism: the numerous nature tourism attractions that take advantage of the mountain ranges, valleys, rivers, caves, geoparks, and viewpoints of the Centro de Portugal region (Figure 9).¹¹

Figure 7 – Cerdeira Schist Village in Serra da Lousã



Source: Turismo Centro de Portugal

¹⁰ The products offered include: Furadouro - Ovar; Praia da Barra - Aveiro; Figueira da Foz; Buarcos, Cabedelo, Molhe Norte, Murtinheira; São Pedro de Moel - Marinha Grande; Nazaré; Peniche; Praia do Medão / Supertubos - Peniche; Praia do Baleal Norte - Peniche; Areia Branca - Lourinhã; Santa Cruz - Torres Vedras.

¹¹ With emphasis on: Serra da Estrela, Serra do Caramulo, Mata do Buçaco, Mira de Aire Caves, Moeda Caves, Santo António Caves, the Serra da Malcata Nature Reserve, the Castelo de Bode Dam, among others. There are many cycling and walking routes, along with many other infrastructures, which favor the practice of active tourism in the natural areas of Centro de Portugal.

Figure 8 – Surf tourism in Peniche



Source: Turismo Centro de Portugal

Figure 9 – Serra da Estrela in Beiras e Serra da Estrela



Source: Turismo Centro de Portugal

- Gastronomy and Wines: with numerous endogenous PDO (Protected Designation of Origin) products (cheeses, wines, olive oils, confectionary, etc.) and with a very rich and highly diversified traditional gastronomy that combines the best that can be extracted from the sea and the mountains, the Centro region offers excellent products that, in complementarity with other local and regional attractions, allow to affirm the destination Centro de Portugal as one of the most surprising gastronomic destinations in Europe (Figure 10).¹²

Figure 10 – Centro de Portugal’s traditional dishes and wine



Source: Turismo Centro de Portugal

- Spiritual and Religious Tourism: the numerous religious tourism attractions that place Portugal in one of the top places of religious tourism (Figure 11).¹³

¹² For example, typical dishes include suckling pig from Bairrada, roast kid from Castelo Branco, lamprey à bordalesa, in Aveiro, or grilled fish in Oeste region, among many others. Also, unique and unmatched are the Serra cheese, the Rabaçal cheese, the yellow cheese from Beira Baixa or the olive oil cheeses saloios. The area of confectionery can also be described as an epic of culinary know-how and flavors, where the highlights are the ovos moles of Aveiro and the pão-de-ló of Ovar; the pastéis of Tentúgal, in the Coimbra area; the horseshoe cakes of Batalha; or the honey of Serra da Lousã, among others. Finally, also worthy of mention are the wine treasures of Centro de Portugal and especially the wines from the three wine regions in Centro de Portugal: the Bairrada wines, the Dão wines and the Beira Interior wines.

¹³ For instance, the Fátima Sanctuary, in Ourém, places Portugal in one of the top places of religious tourism of the catholic world. But in Centro de Portugal, the paths of faith bifurcate in multiple directions, deserving the highlight of the vast

- Cultural and Landscape Touring - Heritage Routes: besides the religious tourism routes, Turismo Centro de Portugal, ERT, promotes a set of other historical and cultural heritage routes.¹⁴

Figure 11 – Fátima’s Sanctuary



Source: Turismo Centro de Portugal

- UNESCO World Heritage sites: Centro de Portugal gathers 4 UNESCO classified sites: Mosteiro da Batalha (classified in 1983), Mosteiro de Alcobaça (classified in 1989), Universidade de Coimbra (classified in 2013) and Convento de Cristo (classified in 1983) (Figura 12).

religious heritage disseminated in the region, namely the Old Cathedral and the Convent of Santa Clara in Coimbra. Among the various religious tourism routes, it is worth highlighting the Portuguese Way of Santiago, which crosses the whole region, from south to north. Finally, all the Jewish heritage of the Centro de Portugal, where the municipalities of Belmonte and Tomar stand out, as well as the Memorial to the Refugees and to the Consul Aristides Sousa Mendes, also deserves due recognition.

¹⁴ For instance: the World Heritage Route of Centro de Portugal, the Fairytale Villages Route (which brings together the 12 Historical Villages, the 27 Schist Villages and the 41 Mountain Villages), the Network of Castles and Walls of the Mondego, the Route of the French Invasions in the Coimbra Region and the Historical Route of the Lines of Torres. Visits to picturesque towns and villages such as Óbidos, Nazaré or Costa Nova (among many others) are also fundamental tourist assets.

Figure 12 – Mosteiro de Alcobaça



Source: Turismo Centro de Portugal

Figure 13 – Snow Tourism in Vale do Rossim in Gouveia



Source: Turismo Centro de Portugal

Other niche tourism products, namely, snow tourism, golf, diving, olive tourism, immaterial heritage products, birdwatching, event tourism, recreational tourism, and many others (Figure 13).

Along with the aforementioned plurality of niche tourism products, and the corresponding diversity of accommodation typologies, other factors (such as dependence on two airports - Lisbon and Oporto - located outside the region, the diversification of tourism supply and demand, the large number of stakeholders involved, as well as the coexistence of eight different sub-regions) contribute to making the monitoring of tourism activity in this region a particularly complex challenge.

3.2 Evolution of the tourism industry 2013-2021:

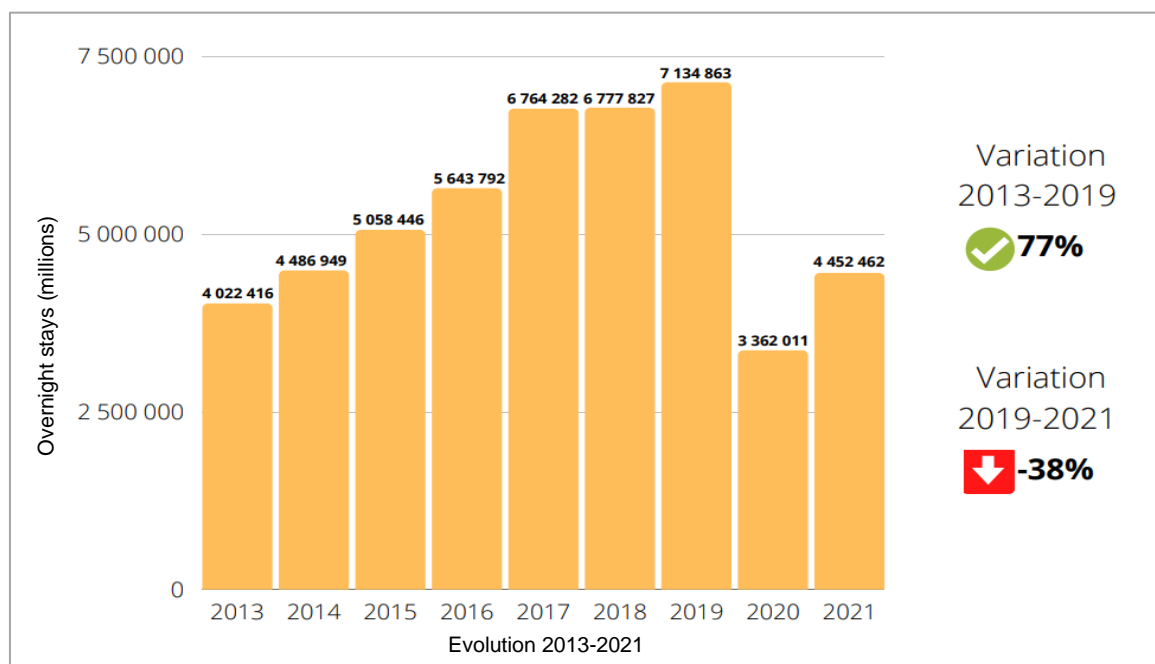
In 2013, Portugal experienced a major change in tourism's administrative organization as the government created seven regional tourism boards, with similar borders to the CCDR's, the regional institutions responsible for regional development, including the EU fundings management at a regional level. This new model was created in opposition to the previous one, in which, until 2008 (between 2008 and 2013 there was a transition model), dozens of entities were responsible for promoting specific tourism assets based on random territorial logic and heterogeneity size. This change was preceded by centralizing in Turismo de Portugal all responsibilities regarding tourism management and Portugal's promotion efforts externally.

This model brought, during the following years, a boom in tourism in Portugal, resulting in consecutive record years and an international recognition of the promotion developed by a joint effort between public and private entities, led by Turismo de Portugal.

This growth was also visible in the Centro de Portugal region, as there was a 77% increment in overnight stays and a 120% increase in earnings between 2013 and 2019, just before the pandemics broke worldwide and affected global tourism (Figure 14).

Despite the 52,9% decrease in overnight stays, in 2020, Centro de Portugal region was one of the less impacted regions in Portugal, as well as Alentejo, due to their traditional predominance of Portuguese tourists (56,3% in Centro de Portugal region in 2019), as well as to a more balanced division between urban and rural lodgment offer.

Figure 14 - Overnight stays in Centro de Portugal (2013-2021)



Source: INE, elaborated by OTSCP

Figure 15 - Centro de Portugal top 10 markets

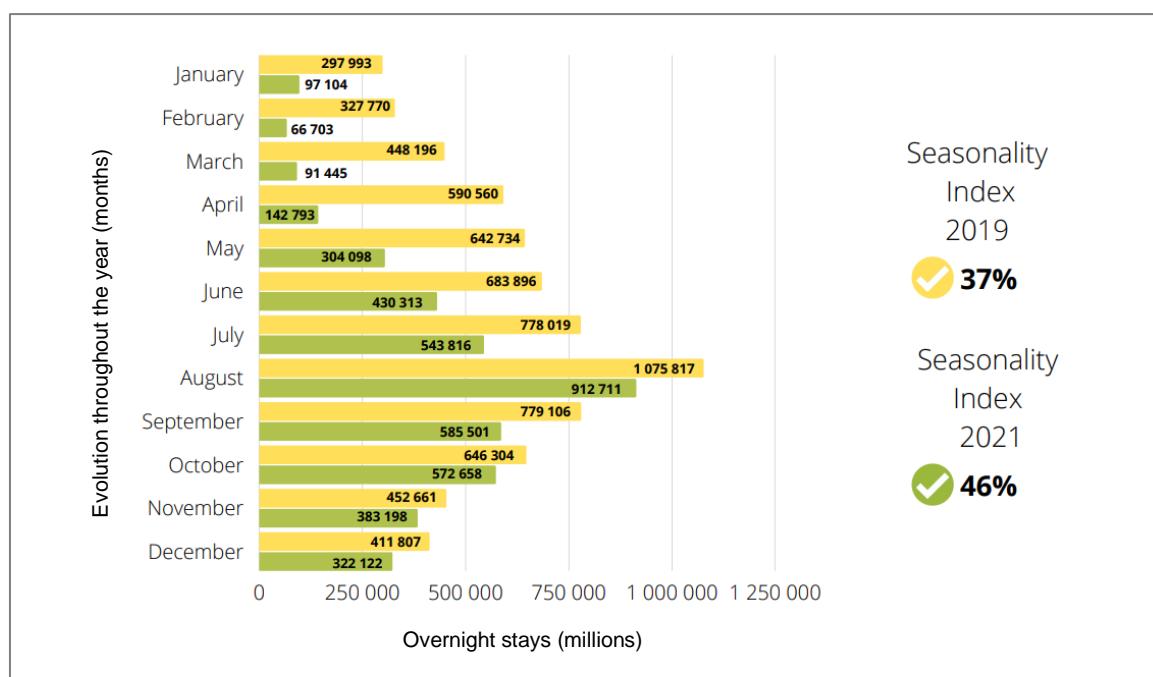
Countries	Overnight Stays 2019	Quota 2019	Overnight Stays 2021	Quota 2021	Var 19-21
Portugal	4 016 888	56,30%	3 351 767	75,28%	-16,56%
Foreign Markets	3 117 975	43,70%	1 100 695	24,72%	-64,70%
Spain	807 255	11,31%	354 622	7,96%	-56,07%
France	343 843	4,82%	135 896	3,05%	-60,48%
Brazil	312 589	4,38%	56 980	1,28%	-81,77%
Germany	204 880	2,87%	87 155	1,96%	-57,46%
USA	172 308	2,42%	42 216	0,95%	-75,50%
Italy	169 940	2,38%	52 733	1,18%	-68,97%
United Kingdom	129 037	1,81%	48 500	1,09%	-62,41%
Netherlands	94 157	1,32%	53 137	1,19%	-43,57%
South Korea	89 576	1,26%	1 578	0,04%	-98,24%

Source: INE, elaborated by OTSCP

To fight Covid-19 further infections, countries implemented internal procedures such as lockdowns, quarantines, and social distancing, as well as closing borders and imposing travel restrictions that affected national economies and especially the tourism industry. Considering the top ten markets in the Centro de Portugal region in 2019 (Figure 15), we can see how long-haul markets such as the American, the Brazilian or the Korean were especially impacted, comparing to the 2021 performance, and how the national market was instrumental to this region's tourism enterprises survival, which was also guaranteed by government grants and schemes aiming to mitigate the overwhelming impact on their finance's health.

In 2019, Centro de Portugal region had a seasonality index of 37% which was still above the 33% goal set for Portugal by the national tourism authority for 2027 (Figure 16). The same index in 2021 (46%) was clearly impacted by a partial quarantine that was imposed internally during the first trimester. The following months showed the first glimpse of full recovery of the tourism fluxes in the Centro de Portugal region, that 2022's performance has confirmed.

Figure 16 - Seasonality of Centro de Portugal from 2019-2021

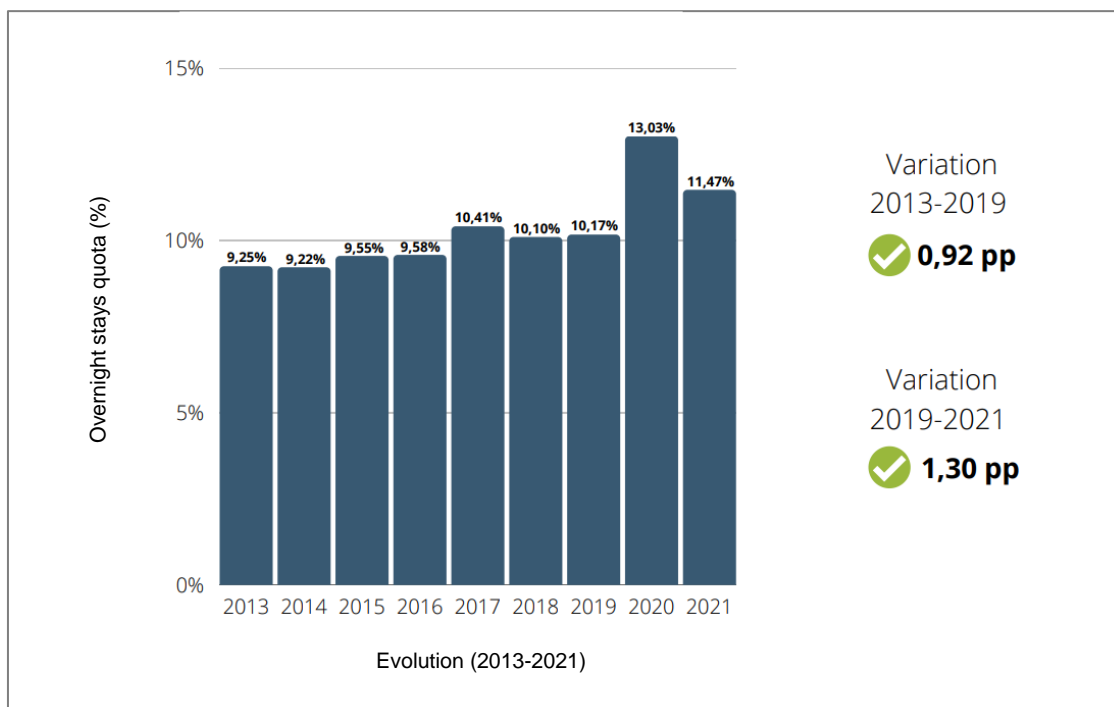


Source: INE, elaborated by OTSCP

Centro de Portugal's growth since 2013 in overnight stays (Figure 17) is also relevant when analyzed in comparison within Portuguese overall growth. Between 2013 and 2019, this region's quota increased 0,92 percentage points (pp), from 9,25% to 10,17%, with the pandemic years showing an

even bigger role in Portugal's context, reaching a 13% quota in 2020. It's also worth noting that all 8 Centro de Portugal's sub-regions registered expressive growth from 2013 to 2019.

Figure 17 - Centro de Portugal Overnight stays quota 2013-2021



Source: INE, elaborated by OTSCP

3.3. Regional Tourism Development Plan 2020-2030

Turismo Centro de Portugal (ERT) has a **Regional Tourism Development Plan for 2020-2030** in the Centro region. The Regional Tourism Development Plan 2020-2030 for the Centro de Portugal region advocates a set of tourism goals and guiding drivers, which are based on strategic lines of action and strategic pillars. **Turismo Centro de Portugal** is the regional entity responsible for the development of the region's tourist potential.

Strategic Vision and Mission:

Mission - Valuing and developing the Centro de Portugal's' regions tourist potential, internal promotion of the Centro de Portugal tourist destination and its sub-regions, as well as the integrated management of the destination within the regional tourism development.

Vision - To be recognized as a forerunner of the integrated tourism development of the Centro de Portugal region, reaffirming the destination's value proposition in the digital era, based on valuing the

human resources, on the consolidation of sustainability conditions, accessibility and dynamization of its strategic assets and its endogenous products, seeking to attract and encourage entrepreneurship, innovation and investment, in conjunction with the regional and local communities, and ensuring its commitment to results, through the preservation of the authenticity of its people, the territory and the success of its economic agents.

In the context of the vision and mission of Turismo Centro de Portugal, **5 guiding drivers** of the strategy for the Centro Region in the 2020-2030 horizon were defined, which are:

1. **Human Resources** - qualify and value all players in the supply value chain of the tourism sector. The Centro de Portugal region has a large network of professional education establishments, Tourism schools from Turismo de Portugal, university and polytechnic higher education in the region that promote a qualified training in tourism.
2. **Destination/Territory** - promote the integrated, sustained, and cohesive development of the territory taking into account **tourism sustainability and climate change challenges**. Moreover, challenges related with mobility, cohesion and territorial enhancement are also addressed.
3. **Differentiation** - structure, qualify, consolidate, differentiate and diversify the quality of the tourist supply.
4. **Notoriety/Connectivity** - contribute to the development of the Centro Region's reputation and consolidation of its brand in the market, as a destination connected to the world (digital marketing and relational marketing and internationalization and dynamization of the brand with foreign markets).
5. **Investment** - boost the attraction of tourism investment in the region and encourage innovation and entrepreneurship: Prospective Analysis, **Monitoring**, and Innovation; **Networks of Stakeholders** and Entrepreneurship.

These **5 guiding drivers** defined for the 2020-2030 horizon, will act on the 5 strategic pillars of tourism supply in Centro de Portugal, especially on religious tourism, heritage, nature, sea and gastronomy and wines:

- **Culture, history, heritage and gastronomy and wines.**
- **Nature, Wellness, Active Tourism and sports and Sea.**
- **Spiritual and religious Tourism.**
- **Corporate and business Tourism.**
- **Lifestyle, inspirational and new tendencies.**

As we were able to see, the Regional Tourism Development Plan for 2020-2030 from the Regional Authority Turismo Centro de Portugal addresses the questions of sustainable tourism and of monitoring as key issue areas to work on in the Centro Region. The main goal is to align the Centro region with the goals of Turismo de Portugal, positioning Portugal as a Sustainable destination. To address these issues, the Centro de Portugal Sustainability Project was created.

3.4. Centro de Portugal Sustainability Project

The Centro de Portugal Sustainability Project, created by Turismo Centro de Portugal and Biosphere Portugal¹⁵, aims to reduce the negative effects of tourism activity in the Centro Region, taking preventive action to avoid them. It complies with the 17 Sustainable Development Goals of the 2030 Agenda, by valuing people, promoting an efficient use of resources and socio-economic development.

One of the strategic actions of this project is the Sustainability Diagnosis, which intends to assess the current status of the Centro de Portugal destination, in view of the requirements established by the Global Sustainable Tourism Criteria (GSTC) for the Destinations. The results and conclusions of this diagnosis will allow assuming Sustainability as the Strategic Action Plan for Tourism in Centro de Portugal. The project is aligned with the goals of Turismo Centro de Portugal's regional tourism plan to 2020-2023 and aims to contribute, clearly, to the objective in the Tourism Strategy 2027, to position the region as a tourist destination of excellence, aligned with the values of sustainability.

A letter of commitment between Turismo Centro de Portugal and Biosphere Portugal was signed on July 22nd, 2021, to formalize the project. All regional stakeholders were notified of this first step towards Sustainability. From that moment on, the diagnosis process began, in accordance with the requirements established by the Global Sustainable Tourism Criteria (GSTC) for Destinations. This first step allows a detailed analysis of the starting point of the territory, and its implication regarding the definition of improvement actions to be developed. Once the actions are implemented in the Destination, their performance will be evaluated through an external audit, which will determine the issuance of the Certification by Biosphere, based on the contribution of tourism and sustainability efforts.

¹⁵ Biosphere is the international sustainability management and recognition system of the **Responsible Tourism Institute** (RTI). The Biosphere system helps the different stakeholders to define, organise and make their sustainable objectives and priorities visible, providing the information, knowledge and tools necessary to make and implement more sustainable decisions, connected to the 2030 Agenda and the 17 SDGs. Biosphere certifies sustainability in companies and destinations, and is present in several countries (<https://www.biospheretourism.com/en>)

Several goals were defined by the responsible authorities Turismo Centro de Portugal and Biosphere Portugal, namely:

- Diagnose and contribute to the knowledge of the territory in terms of sustainability.
- Align and consolidate the positioning of Centro de Portugal as a Sustainable Destination.
- Stimulate the communities' sense of belonging to the territory.
- Promote the dissemination of good sustainability practices in the tourist offer and other agents with an indirect connection to the sector.
- Value and efficiently use resources.
- Stimulate work supported by understanding platforms (network).
- Create training responses for agents (public and private) in the three vectors of sustainability: economic, socio-cultural and environmental.
- Value the authenticity of the regional offer and the reality of the experiences of inhabitants and tourists.

To achieve the aimed goals of the project listed above, Turismo Centro de Portugal and Biosphere Portugal designed several actions that are now being developed in Centro Region:

- Sustainability Diagnosis and Action Plan development.
- Platform of the Sustainability Agenda for Companies.
- Sustainable Tourism Manifest by CIM.
- Sustainable Requirements Manual for Tourist Animation Companies.
- Promote local consumption through the action: *"Tanto sabor...mesmo aqui ao lado"*.
- School Council for Sustainability of the Center Region.
- "People in the Center".
- "Equality is in the Center".
- Program to Combat Food Waste in the Center Region.
- F&B Sustainability Requirements Guide.
- Plastic elimination program.

This project is directed to the 8 Intermunicipal Communities and 100 Municipalities; companies in the tourism sector in the Centro region (accommodation, catering and tourist entertainment companies, travel agents, operators); teaching Establishments; local producers and residents.

The stakeholders involved in the implementation of this project are the CCDR-C (*Commission for the Coordination and Regional Development of the Center*); ICNF (*Institute for the Conservation of Nature and Forests*); Regional Directorate of Culture of the Centre; dioceses; GAL (Local Action Groups);

collaborative networks; sectoral, business and merchant associations. Many of these stakeholders are also participating and cooperating with Centro de Portugal Sustainable Tourism Observatory.

3.5. Monitoring Tourism Activity

As we were able to see, Turismo Centro de Portugal is taking the challenges of tourism sustainability seriously. It strongly promotes the values and the principles associated with the +Sustainable Tourism Plan 2020-23 of Turismo de Portugal, based on sustainable tourism principles and norms, contributing towards achieving the goals of the 2027 Tourism Strategy and strengthening the tourism role in the 17 United Nations' Sustainable Development Goals. To promote Centro de Portugal as a sustainable tourism destination, Turismo Centro de Portugal has created in 2017 the Centro de Portugal Sustainable Tourism Observatory, an autonomous service, with scientific support in a collaborative network of researchers from the nine educational and scientific institutions existing in the Centro region: Polytechnic of Leiria, Polytechnic of Coimbra; Polytechnic of Viseu, Polytechnic of Guarda, Polytechnic of Castelo Branco, Polytechnic of Tomar, University of Coimbra, University of Aveiro and University of Beira Interior.

There are relevant gaps in statistical information on tourism activity at regional and local level, and the main purpose of the Observatory is precisely to fill these gaps. Consequently, the main goal of the Observatory is to provide relevant and regular information to all stakeholders at regional and local level. This is achieved through the publication of periodic reports that serve as compasses for important decision-making at management and investment level. Our methodology, which is currently being tested (in 2023), will enable regular monitoring, gathered through monthly business surveys, quarterly surveys of tourists/visitors and annual surveys of residents. In this way, the Centro de Portugal Tourism Observatory aims to achieve a holistic and detailed knowledge of the multiple economic, socio-cultural, and environmental impacts of tourism, being a reference for entrepreneurs, investors and managers of tourism products and destinations. The Observatory will be further described in chapter 5.

4. Existing available tourism-related data that enables monitoring

4.1. Current tourism statistics in Portugal

This chapter explores the current tourism related data available in Portugal, highlighting the further information gaps that must be addressed by regional Observatories.

In Portugal, there are two entities responsible for the official production of tourism statistics: Banco de Portugal (BdP), responsible for the collection and compilation of monetary, financial, currency and balance of payments statistics, in particular as part of its collaboration with European Central Bank, and the Statistics of Portugal (INE), whose mission is the production and dissemination of official statistical information, promoting the coordination, development and dissemination of national statistical activity, in order to support public, private, individual and collective decision-making, as well as scientific research.

However, Turismo de Portugal, as a National Tourism Authority responsible for the promotion, valuation, and sustainability of tourism activity, aggregating in a single entity all the institutional competences related to tourism development, from supply to demand, is also responsible for monitoring and evaluating tourism activity and their competitiveness factors, by collecting and processing statistical information and conducting studies.

The tourism sector is currently one of the most dynamic economic activities, with increasing importance in terms of the Portuguese economy, regional development and the creation of wealth and employment. This positive sector dynamics has been accompanied by sensitive structural transformations, with the emergence of new business models, new actors and changes in consumption patterns and modes.

These transformations necessarily have implications in terms of the speed of decision making in the sector and in terms of the knowledge needed to ensure greater effectiveness of public policies and business strategies.

On the other hand, the increasing penetration of technology brings with it new opportunities in terms of generating new data sources of a completely different nature and specificity from traditional model-based statistics, providing new approaches to tourism business, profile, and behavior and business models of companies.

The promotion of knowledge in the sector, through the dissemination of more and better information about the sector and the affirmation of Portugal as a smart destination is one of the pillars of the Tourism Strategy 2027, the strategic reference for tourism policy until 2027.

The need to deepen knowledge and improve the tourism statistics system was one of the conclusions of the public consultation process to which the Tourism 2027 Strategy was subjected, representing, to date, one of the weaknesses in the competitive context of national tourism.

In this context, Turismo de Portugal, the National Institute of Statistics and Banco de Portugal signed a protocol to promote the development of tourism statistics in Portugal, creating in this context a Working Group integrating representatives of the three entities.

Under the terms of the signed protocol, the Working Group will be responsible for promoting:

- Survey of existing sources of information in this area, held or known by the three grantors.
- Defining a joint approach to accessing new sources that may be identified.
- The definition of a strategic vision for the future development of tourism statistics in Portugal.

4.2. Statistical Production Areas

In this subsection we further detail which information has been gathered in Portugal in the following production areas of sustainability, namely environmental and social aspects, and in the economic contributions of tourism to the economy and employment. Other statistical production areas analyzed in Portugal can be found in Annex 1.

Sustainability

Survey on Best Practices in Hotels and Golf Courses, which annually obtain information on the dissemination of good environmental practices by the hotel sector and raise the awareness of entrepreneurs about the benefits of reducing the environmental impacts generated by the activity, both in terms of management (cost reduction) and in terms of positioning in the market (image of environmentally responsible company);

TravelBI - Monitoring indicators associated with sustainability objectives is a key component of tourism destination management to ensure the adoption of sustainability principles (social, economic, and environmental). Turismo de Portugal has developed a battery of 43 indicators, supported by a Business Intelligence system, TravelBI, which are available online, through TravelBI website and which will be a repository of key information. The indicators were chosen based on the recommendations of UNWTO and Eurostat, and they cover all three dimensions of sustainability. The goal is to regularly collect data on the performance of tourism development in Portugal, at national and regional level. The information collected by TravelBI is important to the Centro de Portugal Sustainable Tourism Observatory since both management tools have several indicators in common. Therefore, both tools are going to be working together to complement the information collected at local and regional. The complementarity of information between the Observatory and TravelBI can be seen in Table 2.

Besides the data collection methodology, TravelBI aggregates data from **Registo Nacional de Turismo (RNT)**, which is a centralizing platform for all information on tourist resorts, tourist entertainment companies, travel and tourism agencies, and local accommodation establishments, allowing public knowledge of the entire national tourist offer. Data from **Sistema de Informação Geográfica do Turismo (SIGTUR)** is also found in TravelBI. SIGTUR is an online tool created by Turismo de Portugal for visualization of georeferenced information on various themes of the tourism business in Portugal. Therefore, these tools provide relevant information to the development of the Observatory.

Data availability on environmental and social aspects, there are several main entities collecting data on environmental statistics and data is available at the national and regional level (NUTS II):

- Statistics Portugal (INE), whose mission is the production and dissemination of official statistical information, has several information about environmental indicators. They produce the survey on environmental protection by municipalities, the survey on the environmental goods and services sector and the survey on sectoral waste.
- Energy and Geology Direction (DGEG), whose mission is to contribute to the design, promotion and evaluation of energy and geological resources policies, with a view to sustainable development and security of supply. Regularly it publishes indicators related to energy consumption in the Tourism Industry.
- The Portuguese Environment Agency (APA) is a public institute within the scope of the Portuguese Ministry of the Environment, Territory Management and Energy. His mission is to propose, develop and monitor, in an integrated and participating manner, the public policies for the environment and sustainable development, in close cooperation with other sectoral policies and public and private entities. Some areas of intervention are Air, Water, Waste, Climate changes, Noise, Sustainable development, Citizen participation, Environmental assessments, Environmental economics and green growth and Environmental risks.
- The Blue Flag Association of Europe (ABAE) is a non-profit organization dedicated to Education for Sustainable Development and the management and recognition of good environmental practices. ABAE is part of the Foundation for Environmental Education (FEE), which brings together international entities that jointly promote Environmental Education for Sustainability activities from more than 60 countries. ABAE developed several programs with the objective to educate for the sustainability of marine biodiversity, recognition of sustainability in municipalities and in tourism establishments.

Tourism industries and employment

Integrated Enterprise Accounts System (SCIE) allows the achievement of statistical indicators characterizing the structure and evolution of the non-financial business sector in Portugal. SCIE results from a process of integrating statistical information on companies, based on administrative data, with particular emphasis on Informação Empresarial Simplificada (IES). This information is complemented, on one hand, with data for the individual companies coming from the Ministry of Finance and, on the other hand, with data from INE's Statistics Unit File. The data is calculated based on Regulation (EC) No 295/2008 of 11 March 2008 on structural business statistics.

Survey on Employment has as its main objective the characterization of the entire population regarding the economic activity (employed, unemployed and inactive). The aim is to obtain a set of information that allows, from this characterization, to analyze the labor market as a dynamic reality and as a starting point for the definition of socio-economic policies. The condition of work, the sector of economic activity, the profession and the situation in the profession, education and vocational training, job search, the situation a year earlier and the career path are the main aspects of the information that is needed to collect for each individual interviewed.

Economic contribution of tourism to the economy

The activities on TSA (Tourism Satellite Account) compilation to estimate the economic contribution of tourism to the Portugal economy started in 2000 and have been developed until 2007. Between 2008 and 2010, due to lack of data from the Border Survey, it was decided to interrupt its calculation.

Considering the importance that Tourism assumes in the Portuguese Economy, the elaboration of the Satellite Account resumed in 2016.

We also have information about collection and compilation of monetary, financial, currency and balance of payments statistics at national level, which is very important and allows the calculation of various indicators:

- Inbound and Outbound tourism expenditure over GDP
- Inbound and Outbound tourism expenditure over exports of goods and services

4.3 Information gaps

Regarding the information provided in Portugal, most of data is related with the hospitality industry. Nonetheless, even this data could be improved, providing more useful information for entrepreneurs,

when managing their businesses. For example, it is missing disaggregated information about revenue, costs, and net income per type of accommodation and per NUTS III.

In such a heterogeneous region as Centro de Portugal, with several sub-regions with very different characteristics, and with a very diverse portfolio of niche tourism products, generic statistical data focused on accommodation indicators, besides being insufficient, may even be fallacious. Consider, as an example, the indicator "length of stay": as is known, the indicator "length of stay" is operationalized as the number of days of stay of the tourist in a given accommodation unit. From the perspective of destination management, it would be very useful to differentiate the indicator "length of stay in accommodation units" from another indicator "length of stay in the region", since the same tourist, with an itinerant profile, can "accumulate" several stays in the same region during the same holidays, by simply moving from one place to another, changing the place of accommodation. In the case of Centro de Portugal, it is known that many tourists visiting a given local coastal destination (for example, Nazaré, Peniche, Óbidos or Figueira da Foz) then visit mountain destinations (Serra da Estrela, for example) or vice-versa. In this case, it would be very advantageous to redefine some indicators, adjusting their measurement (e.g., using mobile tracking) to the heterogeneity of the region and, ideally, aggregating tourism demand data in order to better understand the dynamics of consumption of each niche tourism product.

There are other sectors linked to the tourism activity for which no information is available and which are sometimes included in other economic activities classifications according to "Classificação Portuguesa de Atividades Económicas" (CAE). For instance, there is no national and regional data available regarding the food and beverage industry, tourism recreation, rent-a-car, travel agencies, transport with driver, visitable places, and others, for example, handicraft shops. Therefore, it is possible to indicate some missing indicators in the Portuguese statistics that are of extreme importance to help tourism entrepreneurs manage their businesses. For instance, it is important to have regional data related with average price per meal, the number of meals served, recreation revenue, the average price per bus and travel agencies' revenue from incoming and outgoing. This information will help entrepreneurs increase the competitiveness of their tourism businesses.

Moreover, data regarding environmental and social impacts of tourism, namely, indicators related with biodiversity protection, climate change, water usage, energy usage, consumer satisfaction and local communities' satisfaction are lacking. Collecting data related with these issue areas is essential to help all stakeholders position themselves in accordance with sustainability values and achieve the goals of Centro de Portugal Sustainability Project. These information gaps will be addressed by the

system of indicators selected by the Centro de Portugal Sustainable Tourism Observatory, which will be explained in the next chapter of this report.

5. The Sustainable Tourism Observatory of the Centro de Portugal (OTSCP)

5.1. General framework and challenges

As previously mentioned, the plurality of niche tourism products, the corresponding diversity of accommodation typologies, other factors such as the dependence on two airports - Lisbon and Oporto - located outside the region, the large number of stakeholders involved, the coexistence of eight different sub-regions, as well as the very fact that Centro region is a kind of “newborn” (since it covers a territory of 100 municipalities, while until 2013 its geographic composition included only 57 municipalities), all these factors together contribute to making the monitoring of tourism activity a particularly complex and challenging process.

To address these challenges the Centro de Portugal Sustainable Tourism Observatory OTSCP was designed in 2017 from the following structural principles:

- A. Adoption of a holistic approach to sustainable tourism development, guided by a comprehensive system of economic, social and environmental indicators for regular monitoring of the impacts of tourism activity. After a benchmarking analysis of existing indicator systems, it was decided to adopt the ETIS - European Tourism Indicator System model, as it is sufficiently comprehensive and is the most widely used in Europe.
- B. Involvement of all stakeholders in the Centro de Portugal region, supported by a truly representative Regional Working Group (RWG) (Annex 4) of the various relevant stakeholders (Annex 2 and 3). This RWG comprises two advisory bodies: the Scientific Council (SC) of the OTSCP and a Business Advisory Council (BAC). The Scientific Council is representative of all universities and polytechnic institutes located in the Centro de Portugal regions (universities of Coimbra, Aveiro and Beira Interior, and polytechnic institutes of Leiria, Tomar, Coimbra, Viseu, Guarda and Castelo Branco), and it includes 36 experts from all Portuguese research units in Tourism.

The Business Advisory Council (Annex 3 and 4) is made up of the 8 municipal associations that represent all the municipalities in the region and all the relevant professional associations, namely:

- 9 business association representing all tourism sectors.

- 4 associations managing programs for the valorization of endogenous resources.
- 23 associations for local and regional development.
- 19 associations representing specific sub-regions.
- 2 certifying entities of products and tourism destinations.

5.2. OTSCP Timeline

The OTSCP has come a long way. Having started its activity in 2017, it produced during the first three years a substantial amount of work but had to stop in 2020 due to COVID-19. The work done in the first three years was planning, structuring, inventorying the tourism offer and creating the architecture of the digital platform. From October 2021 the activity was restricted, but with a focus on the creation of collaborative networks. In 2022 data collection began with a regular survey, the two advisory boards that are the basis of the Regional Working Group were created and an intensive awareness-raising campaign was conducted among entrepreneurs in the various sub-regions of Centro de Portugal, aiming to make them aware that, they should share information on a regular basis. In 2023, we are testing and improving our methodology with tourism stakeholders, i.e., testing our surveys with tourism entrepreneurs. Finally, from 2024 onwards, we will officially implement our monitoring methodology.

❖ 1ST Stage: June 2017- December 2019

- Elaboration of a data collection model.
- Exhaustive tourism supply inventory in the Centro de Portugal region.
- Creation of the online platform.
- Validation of the indicator system (1st phase).
- Development and validation of a set of indicators (1st phase) and conceptualization; of the Tourism Monitoring System of Centro de Portugal (TMSCP).
- 1st survey: “Entrepreneur Survey 2018-2022: The Importance of Tourism Monitoring Indicators”.

❖ 2nd Stage: October 2021- May 2022

- Online platform test.
- Proposal of the set of indicators.
- Creation of the Scientific Council.
- Creation of the Business Advisory Council.
- Test of the model - surveys to: (1) companies; (2) tourists; (3) municipalities; (4) residents.

❖ 3rd Stage: May 2022 – December 2022

- 1st OTSCP Study - Entrepreneur Survey 2018-2022: The Importance of Tourism Monitoring Indicators.
- 2nd OTSCP Study – Annual resident survey 2022: Tourism in Centro de Portugal Region, the perspective of the residents (both studies can be found here: https://smat.observatorio-tcp.pt/estudos-regulares/#er_observatorio).
- Organization of 7 OTSCP conferences “Conhecer *melhor* para investir *bem* no turismo da Região Centro” in 7 NUTS III of Centro de Portugal Region, to raise awareness and to present OTSCP to tourism entrepreneurs:
 - 4th October: “Better knowledge to invest well in tourism of Oeste region”.
 - 3rd November: “Better knowledge to invest well in tourism of Viseu Dão Lafões region”.
 - 9th November: “Better knowledge to invest well in tourism of Leiria region”.
 - 16th November: “Better knowledge to invest well in tourism of Beira Baixa region”.
 - 22th November: “Better knowledge to invest well in tourism of Coimbra”.
 - 29th November: “Better knowledge to invest well in tourism of Médio Tejo region”.
 - 30th November: “Better knowledge to invest well in tourism of Beiras e Serra da Estrela Region”.

❖ 4th Stage: Current stage – 2023

- Online platform test.
- INSTO application of OTSCP.
- Methodology test: of monthly, quarterly, and annual surveys to tourism companies in the online platform.

❖ 5th Stage - From 2024 onwards

- Implement our methodology and start regular monitoring.

5.3. Structural Model of the Observatory

A) Legal nature

The Centro de Portugal Sustainable Tourism Observatory is an autonomous service of the Regional Authority Turismo Centro de Portugal, developed in collaboration with universities and polytechnics of the Centro de Portugal region.

B) Vision

The Observatory aims to be a reference in the production and availability of information on Centro de Portugal, as a support to the management of the destination, contributing to decision-making based on adequate and timely knowledge of the complex realities of tourism.

C) Mission

The mission of the Observatory is to promote the knowledge of the tourism activities and its impacts on the territories, in a double perspective (transversal or intersectoral and longitudinal or evolutionary), in an independent and responsible way, ensuring the technical and scientific suitability of the obtained data, in order to increase the competitiveness and sustainability of tourism in the Centro de Portugal region.

D) Organizational model

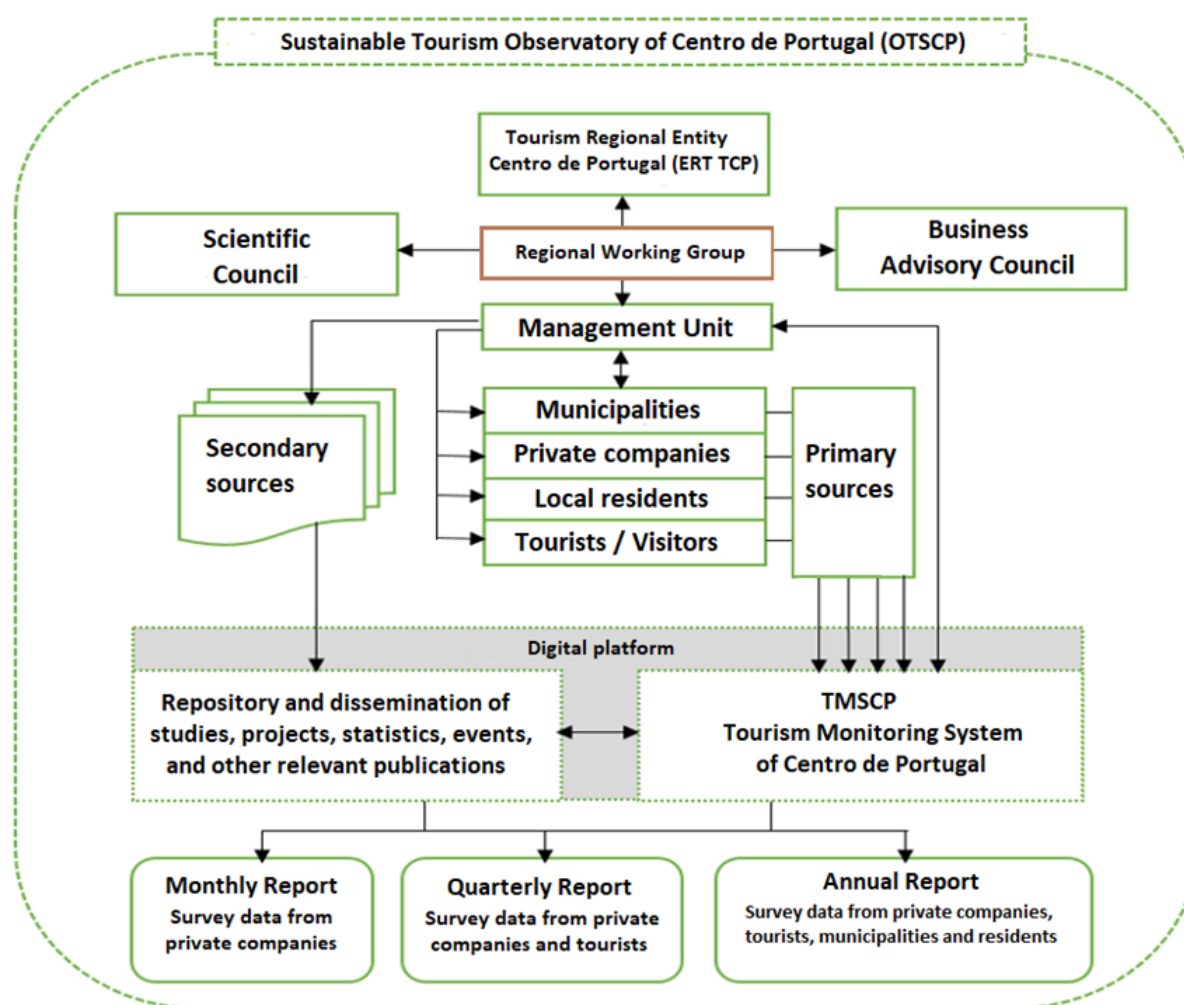
The Observatory was conceived in 2017 as a network structure, open to the collaboration of all entities. Its organizational model assumes the collaboration of all business associations, through a Business Advisory Council (BAC), and of all the universities and polytechnic institutes based in the Centro de Portugal region are represented in the Scientific-Technical Council (SC).

A very important role is given to the municipalities, which are encouraged to select a representative and assist the Management Unit of the Observatory. They are asked to provide the Observatory with the most exhaustive information on the tourism offer in each municipality, namely resources and tourist attractions and companies in the various sub-sectors. Municipal representatives also play a key role in raising awareness and sensitivity among entities that provide primary data (companies and entities in the sector), through a predefined procedure.

As illustrated in Figure 18, the Observatory collects and aggregates statistical data and useful information from two types of sources:

- (a) The Tourism Monitoring System of Centro de Portugal (TMSCP), which is **the primary data** that is collected by the Observatory through surveys, later available in monthly, quarterly, and annual reports.
- (b) The information repository, which aggregates and makes available information from **secondary sources** (INE, Eurostat, European Union, Turismo de Portugal, DGPC/ICOM, APOM, business associations, etc.), namely projects, studies, events, surveys, and statistics.

Figure 18 - OTSCP structural model



Source: own

E) General objectives

The Turismo Centro de Portugal authority and the regional working group of the Observatory defined several objectives that are framed in four vectors of action for the Observatory: monitoring, informing, training, and guiding:

- a) **Monitoring:** the aim is to identify gaps and needs in statistical information and to set up a statistical production system for tourism in Centro de Portugal region. **The TMSCP – Tourism Monitoring System of Centro de Portugal**, that collects primary data by using surveys, is based on a set of indicators that ensure full correspondence with the ETIS - European Tourism Indicator System model and the guidelines of UNWTO (see Tables 2 and 3).

- b) **Inform:** all knowledge obtained from the monitoring and management of information on local and regional tourism is shared in good time with all the stakeholders of the Centro de Portugal destination.
- (a) **Training:** monitoring the dynamics of the labor market in the various sub-sectors of tourism in the Centro de Portugal region makes it possible to identify training and qualification needs of the professionals involved in tourism in the region.
- (b) **Provide guidance:** the regular reports issued by the Observatory will support policymakers at local, inter-municipal and regional level, promoting the evaluation of tourism policies and the drafting of new policies, based on more and better informed consensus, from a perspective of governance, which in turn will have impact on the competitiveness and sustainability of the tourism sector.

F) Specific goals

The Observatory focuses primarily on meeting the information needs of local and regional actors and regional stakeholders. According to a repeated survey carried out by the Observatory ("*A Importância dos Indicadores de Monitorização Turística | Inquérito aos Empresários 2018-2022*" - here: https://smat.observatorio-tcp.pt/estudos-regulares/#er_observatorio), the information needs most felt by tourism stakeholders correspond to the following domains:

1. Tourists' profile, motivations, satisfaction and behaviors.
2. Demand and supply of specific tourism products.
3. Quantitative indicators of tourism demand (namely, guests, overnight stays, seasonality, length of stay, market shares).
4. Supply-related indicators (accommodation capacity and occupancy rates).
5. Supply of and demand for cultural, recreational and leisure services.
6. Studies that report on the economic impact of tourism for the region.

In order to fill these information gaps, as well as to provide managers and other tourism stakeholders with a detailed knowledge of tourism activity, the Observatory undertakes the following commitments:

- Monitoring the evolution of the tourism sector and the main trends.
- Monitoring the economic, environmental and social impacts of tourism.
- To ensure the reliability, coherence and relevance of the information produced.
- To meet the information needs of local tourism stakeholders.

- Carry out relevant sectoral and sub-sectoral studies, from the perspective of decision-makers.
- Carry out specific studies focused in different niche tourism products.
- To provide inputs to the tourism research system.
- Encourage the decision-making process based on the information produced.
- Providing information through regular publications.
- To maintain a continuously updated database with general access.

G) Providing information to stakeholders

To provide the Observatory with a set of attributes that make it useful to all stakeholders, an action model was defined that guarantees maximum efficiency in the production and dissemination of information (Table 1). This model was defined with the regional working group and is being tested since 2022.

Table 1: Model for providing information to stakeholders

Attributes	Description
Periodicity of information disclosure	Dissemination of a monthly report based on a monthly business survey.
	Disclosure of a quarterly report based on a business and consumer survey.
	Dissemination of an annual report providing an overview of sector performance, including data from business, customer, resident, and municipal surveys.
Information availability	Friendly access to information: the Observatory is supported by a digital platform (https://smat.observatorio-tcp.pt/), which makes information available to all interested parties in an accessible and intuitive way.
	Reduction of information dispersion: the Observatory works as a repository of information and studies produced by other entities for the region, and of other studies that, even though they are related to wider territorial units, may influence the development of tourism in the region.

	Just in time information: data is made available in good time for political, strategic and management decision-making.
Reliability of methodologies	Procedures that favor the reliability and coherence of the information produced are adopted. In this sense, great importance is given to raising the awareness of the entities that provide primary data, making them aware of the importance of transmitting correct and rigorous information. It is the responsibility of the Scientific Council of the Observatory to guarantee the validity and reliability of the data collection and processing methodologies.
Supporting innovation	The Observatory aims to carry out specific studies on innovative tourism products offered by the region, and on potential or emerging source markets whose desires, needs and motivations suit the specific features of the region.
Proactivity	The Observatory should help anticipate market trends and behaviors and changes in the macro and micro-economic environments in order to generate competitive advantages over competing destinations.
Geographical coverage	The Observatory ensures primary data collection at regional level, with breakdown and analysis at county and parish level.
	With regard to information on the other NUTs II and I, the Observatory acts as a repository of relevant data produced by other entities.
Sectoral coverage	The Observatory gathers comprehensive information which makes it possible to assess and understand the tourism sector as a whole, including all the sub-sectors: accommodation, cultural services, recreational services, restaurants, transport, rent-a-car, tour operators and agencies, and guides.
Systematic and continuous nature	The Observatory ensures the systematic production of information based on previously defined indicators, avoiding the break in series and, consequently, allowing an accurate evaluation of the tourism activity in the region.

5.4. Primary data source

a) Monitoring issue areas

As mentioned before, the Observatory aggregates two types of sources: primary (information collected by the Observatory) and secondary sources (information collected from other sources but aggregated in the repository of the Observatory). The Tourism Monitoring System of Centro de Portugal (TMSCP) is the model of indicators created to collect and feed the Observatory with primary data about the development of tourism in Centro Region. It was conceived as part of a partnership between the Regional Entity of Turismo Centro de Portugal and Polytechnic Institute of Leiria, through CITUR - Centre for Research, Development, and Innovation in Tourism, with the following purposes:

- a. The monitoring of the tourism industry in the Centro de Portugal region is based on appropriate management indicators, as a factor of competitiveness and sustainability of the destination, in its various aspects: economic, socio-cultural and environmental.
- b. Optimization of the data collection process in the tourism sector, through a collaborative networking approach, by means of a methodology perceived as credible, efficient and suitable.
- c. Making periodic reports delivering valuable information in a timely manner to all stakeholders.

b) Methodology of data collecting process

TMSCP is the monitoring system of the Observatory that is operating according to the networking model and with the general objective of providing tourism stakeholders and destination managers of Centro de Portugal with primary, accurate and detailed data, made available just in time, concerning tourism activities and tourism consumption at regional and local level.

The TMSCP was developed following a diagnosis of the information needs felt by the tourism managers, entrepreneurs, and researchers, and having as main reference the European Tourism Indicators System (ETIS), which establishes the European Union guidelines for the continuous monitoring of tourism industry at regional and local level. The Observatory monitors all INSTO areas (see Table 2) and other supplemental issues important to regional stakeholders (Annex 5).

The TMSCP produces and makes available monthly, half-yearly and annual reports, bringing clear benefits to all tourism stakeholders, both at local and regional level.

Table 2 – Checklist of INSTO Mandatory issue areas

ISSUE AREA	DESCRIPTION	ETIS SECTION	EXAMPLE OF INDICATORS	TravelBI AREA	STATUS	DATA COLLECTION
1. Local satisfaction with tourism	Residents' perception on tourism development	Economic value	<ul style="list-style-type: none"> - Percentage of residents who are satisfied with tourism at the destination (per month/season) (code: 040) - Percentage of residents who are satisfied with the impact of tourism on the identity of the destination (code: 046) 	No	Available in platform ¹⁶	Annual survey by OTSCP in platform
2. Destination economic benefits	Expenditure in destination, arrivals.	Economic value	<ul style="list-style-type: none"> - Percentage of income directly related to tourism (code: 007) - Daily expenditure (per tourist and day visitor) (code: 025) - Relative contribution of tourism to the economy (% of GDP) (code: 072) 	Yes (to compare and complement the regional data)	Currently testing	Monthly survey by OTSCP in platform
3. Employment	Number of formal employees in accommodation in food sectors, wages, etc.	Economic value; Social and cultural impact	<ul style="list-style-type: none"> - Direct employment in the tourism sector as a percentage of total employment in the destination (code: 073) - Percentage of seasonal jobs (code: 074) 	Yes (to compare and complement the regional data)	Currently testing	Monthly survey by OTSCP in platform
4. Tourism seasonality	International travelers' arrivals per month and market (volume and % of annual arrivals)	Economic value	<ul style="list-style-type: none"> - Relative weight of tourism demand in the months of greatest demand in relation to the annual total (code: 059) - Percentage of seasonal jobs (code: 074) - Overnight stays by month/year (code: 020); - Guests by month/year (code: 005) 	Yes (to compare and complement the regional data)	Planned to start on March 2024	Monthly survey by OTSCP in platform
5. Energy management	Energy consumption by tourist nights	Environmental impact	<ul style="list-style-type: none"> - Percentage of tourism enterprises that adopt measures to reduce energy consumption (code: 037) - Percentage of the annual amount of energy consumed from renewable sources (megawatts per hour) in relation to the total energy consumption in the destination per year (code: 050) 	Yes (to compare and complement the regional data)	Planned to start on January 2024	Annual survey by OTSCP and municipalities in platform
6. Water management	Fresh water consumption per tourist night	Environmental impact	<ul style="list-style-type: none"> - Percentage of tourism enterprises adopting measures to reduce water consumption (code: 035) - Water consumption for each tourist night compared with the water consumption per night of a resident (code: 080) 	Yes (to compare and complement the regional data)	Planned to start on January 2024	Annual survey by OTSCP and municipalities in platform

¹⁶ Available here: https://smat.observatorio-tcp.pt/doc/estudos_observatorio/INQUÉRITO ANUAL - A PERSPETIVA DOS RESIDENTES.pdf

Preliminary report of Centro de Portugal Sustainable Tourism Observatory (OTSCP)

7. Wastewater management	Percentage of sewage from the destination treated	Environmental impact	<ul style="list-style-type: none"> - Percentage of tourism enterprises using recycled water (code: 036) - Percentage of own wastewater treated with at least one secondary level before discharge (code: 049) 	No	Planned to start on January 2024	Annual survey by OTSCP and municipalities in platform
8. Solid waste management	Waste volume produced in destination	Environmental impact	<ul style="list-style-type: none"> - Percentage of tourism enterprises that separate the different types of waste (code: 034) - Percentage of total waste recycled per tourist in relation to the total waste recycled per inhabitant per year (code: 079) - Waste generation per night of tourists compared to waste generation per person of the general population (Kg) (code: 078) 	Yes (to compare and complement the regional data)	Planned to start on January 2024	Annual survey by OTSCP and municipalities in platform
9. Governance	Workshops held, new legislation, etc.	Social and cultural impact; Destination management	<ul style="list-style-type: none"> - Number of second homes per 100 dwellings (code: 077) - Number of tourists or visitors per 100 inhabitants (code: 075) - Percentage of enterprises having a voluntary certification (environmental, quality, sustainability, or CSR label) (code: 031) - Percentage of visitors who repeat or return to the destination in the last 5 years (code: 024) 	Yes (to compare and complement the regional data)	Planned to start on October 2023	Members of CTC of OTSCP
10.Climate Action	Percentage of tourism enterprises involved in climate change mitigation schemes, such as CO2 offset, low energy systems, etc.	Environmental Impact	<ul style="list-style-type: none"> - Percentage of tourist accommodation and attraction infrastructure located in "vulnerable zones" (code: 048) - Percentage of local tourism enterprises actively supporting the protection, conservation and management of local biodiversity and landscape (code: 038) - Average carbon footprint of tourists and day visitors on their journey from home to destination (code: 057) 	Yes (to compare and complement the regional data)	Currently testing	Annual survey by OTSCP in platform
11.Accessibility	Percentage of visitor attractions that are accessible to people with disabilities	Social and cultural impact	<ul style="list-style-type: none"> - Percentage of commercial accommodation establishments with rooms for disabled persons (code: 042) - Percentage of commercial accommodation establishments participating in official information programs on accessibility (code: 043) - Percentage of public transport that is accessible to people with disabilities and with specific accessibility needs (code: 044) - Percentage of places of touristic interest that are accessible for people with disabilities or that participate in official information programs on accessibility (code: 045) 	Yes (to compare and complement the regional data)	Currently testing	Annual survey by OTSCP in platform
12.Tourist satisfaction	Online and face-to-face Questionnaires	Economic value	<ul style="list-style-type: none"> - Percentage of tourists and day visitors who are satisfied with their overall experience at the destination (code: 023) - Percentage of visitors who repeat or return to the destination in the last 5 years (code: 024) 	No	Planned to start on June 2023	Quarterly survey by OTSCP in tourist offices

b) Promoting the participation of respondents

To achieve a high response rate to the surveys by company managers, TMSCP adopts a highly professional strategy, anchored on four elements, namely:

1. User-friendly and intuitive digital platform.
2. Simple questionnaires, including as few indicators as possible.
3. Raising the awareness of stakeholders, emphasizing that in a logic of cost/benefit the advantages of participation far outweigh the effort required.
4. Guarantee of absolute anonymity but with control of abstentionism.

c) Absolute anonymity but controlled abstention

It is important to bear in mind that the TMSCP aims to conduct comprehensive surveys of companies: that is, it is intended to cover as many companies in the sector as possible, rather than to carry out mere sample surveys. Ideally, ALL COMPANIES should participate. Therefore, the response rate of the surveys could vary between 0% and 100% (i.e., between "no entrepreneurs/managers responded" and "all entrepreneurs/managers responded").

In order to minimize hypothetical inhibitions of response motivated by possible negative implications of providing sincere answers to "delicate" questions, and also to stimulate sincerity of the respondents, the TMSCP created an electronic device that offers full guarantee of anonymity to the respondents: the electronic privacy and security system that the TMSCP used in data collection is similar to the one used by the banking system, which gives every guarantee of non-violation of privacy to its clients' online accounts.

The use of random passwords and a data discontinuity algorithm makes it impossible for anyone to identify the answers that managers/entrepreneurs give to online surveys under any circumstances. Despite offering an absolute guarantee of anonymity to respondents, the digital platform will signal, by changing the BU status (business unit status), informing this way which companies have actually responded to the questionnaire and which have not. In cases where the BU status signals "not completed by the deadline", the respective managers/entrepreneurs will receive an automatic reminder, making them aware of the importance of responding and informing them that they have a "second chance".

In cases where the BU status signals "not completed by the deadline", the respective managers/entrepreneurs will receive an automatic reminder, making them aware of the importance of responding and informing them that they have a "second chance".

c) Regular / Periodic barometers

I. Monthly Barometer

The monthly barometer is based on a set of indicators relating to the performance of companies in the various sub sectors that make up the tourism industry. In order to fill the gap in the official statistics, made available by INE and based only on the accommodation sub-sector, the TMSCP indicators cover the following sub-sectors:

- Accommodation, considering the various typologies.
- Restaurants and beverages.
- Passenger transport.
- Tour operators, travel agencies and tour guides.
- Rent-a-car.
- Cultural services.
- Recreational services (including tourist entertainment companies and maritime-tourism operators).
- Trade in handicrafts and tourism products.

All business units of these eight sub-sectors, operating in the Centro region, are already registered and integrate the Observatory's digital platform.

With the collaboration of municipalities, and using the lists of registered companies of Turismo de Portugal, TMSCP made a census of all business units in all 100 municipalities of the Centro de Portugal region, and on the next stage with invite managers of these business units to participate in the Monthly Barometer, making them aware of the importance of participating and providing reliable information about their companies.

II. Quarterly Barometer

The quarterly barometer has a broader content and includes information on tourism indicators from two sources:

- **Companies:** this barometer aggregates in quarterly series the statistical information regarding the performance of companies, collected on a monthly basis.
- **Visitors:** it summarizes qualitative and quantitative data based on visitor surveys, namely: profile, motivations, preferences, spending, satisfaction and behavior.

The visitors survey is carried out in the two months prior to the publication of the report, with the support of the tourism offices of the municipalities.

III. Annual Barometer

The annual barometer is based on four sources of information: businesses, municipalities, tourists/visitors and residents.

The annual report brings together statistical data from all indicators for the year and provides management indicators that can only be obtained in annual series, such as seasonal variations in tourism demand or employment in the sector.

The report produced from the annual barometer should be comprehensive and include information on all the indicators recommended by the *European Tourism Indicators System* (ETIS).

d) Summary of the regular studies of the Observatory

Data collection is based on surveys, with different periodicities depending on the type of respondents, as described in Table 3:

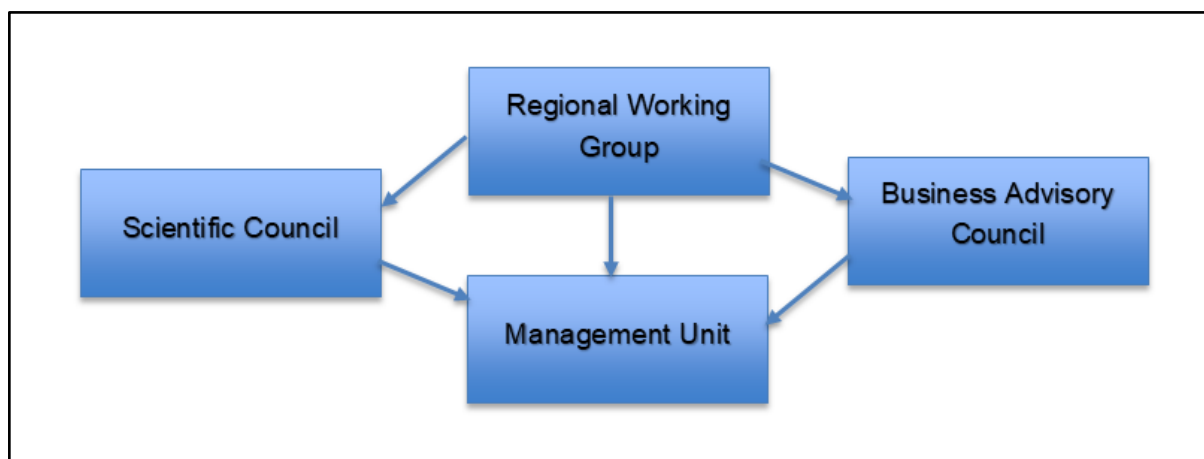
Table 3 - Survey characteristics

Respondents	Type of survey	Periodicity	Means to be used in data collection	Responsible for data collection
Companies	Exhaustive	Monthly	Digital platform	OTSCP supported by Regional Working Group
Tourists and one-day visitors	Sample	Quarterly	App, online surveys, and face-to-face interviews	OTSCP supported by Regional Working Group and municipalities
Residents	Sample	Annual	App, online surveys, and face-to-face interviews	OTSCP supported by Regional Working Group, parishes and municipalities
Municipalities	Sample	Annual	Digital platform	OTSCP supported by Regional Working Group

5.5. The Regional Working Group (RWG)

As mentioned above, the Observatory is supported by a wide range of stakeholders grouped in the Regional Working Group, whose permanent members are appointed by the two advisory councils: the Business Advisory Council and the Scientific Council, as we can see in Figure 19. The Regional Working Group (RWG) was made aware of this application.

Figure 19 - Managing structure of OTSCP



a) The Scientific Council

The Scientific Council (SC), of a consultative nature, is a group of academic experts and researchers from the areas of knowledge relevant for the sustainable development of tourism (tourism, management, economics, geography, regional planning, sociology, regional development, business sciences, among others), working at higher education institutions and research units of the Centre Region (see annex 4).

Mission

The mission of the SC is to serve as a guarantor of the scientific suitability of the studies undertaken by the Observatory, ensuring the consistency of data collection processes and the coherence of methodologies, as well as the scientific validity of its studies.

Objectives

The objectives of the SC are the following:

- To validate the model of the TMSCP - Tourism Monitoring System of Centro de Portugal, proposed by the Management Unit of the Observatory.
- To generate consensus on the best methodological procedures to be used in the Observatory's empirical studies.
- Contribute to improving the methods of data collection and processing used, auditing the various stages of empirical studies carried out by the Observatory.

- To give an opinion on the quality of the communication of the results present in the Observatory's reports.

Representativeness of the SC

Each member of the CTC acts in representation of the Research Unit to which he/she is affiliated at the time of his/her integration, being designated by the respective research unit.

Mandate of the members

The term of office of SC members is 2 years and may be extended for a further period of 2 years at the invitation of the Managing Unit of the Observatory.

Internal structure

The SC is constituted by one or more representatives of each adherent research unit. In the first meeting of the body, the members elected the chairman and the secretary.

It is the responsibility of the Chairman of the SC to convene the General Assembly, whether ordinary or extraordinary, to propose the respective agenda, to direct the work and to submit the minutes for the approval of the SC.

It is also the responsibility of the Chairman of the SC to represent the SC between two General Meetings, either in the Regional Working Group or in any other context in which the role of the Observatory's SC is relevant.

The SC Secretary is responsible for assisting the Chairman in all activities, especially in the conduct of each General Meeting, preparing the respective minutes and ensuring the filing of CTC documents.

b) Business Advisory Council

The Business Advisory Council is made up of representatives of all the business sectors involved in structuring tourism supply, namely sectoral tourism associations, business associations in the Centro de Portugal region, as well as representative organizations of regional and local development and public entities, namely: inter-municipal councils, local and regional development associations and entities that manage programs to enhance the value of endogenous resources in Centro de Portugal (see annex 4).

Mission

The mission of the BAC is to contribute to the overall quality of the Observatory's studies considering the multi-sectoral and holistic character of tourism, as well as the specificity of each business sector in the context of the tourism industry.

Objectives

The objectives of the BAC are the following:

- To facilitate the implementation of the TMSCP (Tourism Monitoring System of Centro de Portugal, proposed by the Management Entity of the Observatory) in the business environment.
- To verify the suitability of the methodological procedures to be used in the Observatory's empirical studies.
- To contribute to the improvement of data collection and processing methods used at the Observatory, auditing the various stages of empirical studies carried out by the Observatory.
- To give opinions and make proposals on the quality of the communication of the results present in the Observatory's reports.

Representativeness of the BAC

Each member of the BAC shall act on behalf of the respective organization to which he or she belongs and shall be designated by that organization.

Mandate of members

The term of office of BAC members shall be 2 years and may be extended for another 2-year period at the invitation of the Managing Entity of the Observatory.

Internal Structure

The BAC is composed of representatives of the member organizations. At its first meeting, BAC members elect its Chairperson and Secretary, as well as its Permanent Commission, composed of a total of 10 members (including the Chairperson and Secretary).

It is the responsibility of the Chairperson of BAC to convene the General Meeting, whether ordinary or extraordinary, propose the agenda, direct the work and submit the minutes for approval by BAC.

It is also the responsibility of the Chairperson of the BAC to represent the Observatory between two General Meetings, either in the Regional Working Group or in any other context in which the role of the Observatory's BAC is relevant.

The BAC secretary is responsible for assisting the chairman in all activities, especially in the conduct of each General Assembly, preparing the respective minutes and ensuring the filing of BAC documents.

The BAC's permanent commission shall enable processes to be expedited but does not replace the BAC.

Annexes

Annex 1: Other areas of statistical information in Portugal:

1. Tourism flows and visitors' profile

International Tourism Survey - This survey was conducted between 2004 and 2007, and was resumed in 2015, with a methodological review of the statistical operation.

It allows estimating the number of residents and non-residents crossing the main national borders, knowing their traveler profile and their trips, as well as obtaining a structure for tourist spending by main expenditure items.

This survey makes it possible to obtain indicators at NUTS II level, by country of residence, in the case of non-residents, and by country of destination, in the case of residents, as well as by type mean of transport and according to the demand season (average, high and low):

- Residents who went abroad by air and road
- Non-residents who visited Portugal by air and road
- Non-residents in transit in Portugal by sea / cruises

The information obtained through this survey also makes it possible to satisfy the needs to produce the Tourism Satellite Account and the Harmonized Index of Consumer Prices, as well as the information needs of tourism stakeholders in general and Turismo de Portugal in particular.

It is extremely important information to evaluate Portugal's positioning at the international level vis-à-vis our main competitors.

Also, in the scope of tourism flows, the following surveys are carried out in Portugal, which allows collecting data at NUTS II level and by municipalities:

Survey on guest stays in hotels and other establishments (IPHH) - this operation fulfills the legal obligations defined in Regulation (EU) n.º 692/2011 of July 6, which replaces the Community Directive 95/57 / CE, of November 23, on the Tourism sector. This survey allows monthly assessment of the following indicators regarding accommodation facilities (hotel establishments, holiday villages and apartments, local accommodation, and tourism in rural areas):

- Hotel guests and overnight stays.
- Accommodation capacity (n.º units, beds and rooms).
- Total Revenues and Room Revenues.
- RevPar.
- Average Stay.
- Personnel employed.

Travel survey of residents (IDR) – developed in accordance with Community Directive 95/57 / EC of 23 November 1995 on the collection of statistical information in the field of tourism. It allows to quantify the incidence of resident population in Portugal that makes tourist trips and the frequency of the displacements, as well as to identify the demographic profile of the tourists; Obtain information about the tourist trips carried out in its various aspects, such as motivation, place of destination, means of travel and accommodation, methods of booking, expenses, among others.

Survey on Camping Sites, allows the monthly calculation of indicators related to the number and overnight stays of campers.

Survey on Hotels, which allows the monthly calculation of bed and room occupancy rates.

Prices in Accommodation Survey - which allows the monthly calculation of prices in accommodation.

Survey on Recreational Services (Tourism Animation), which allows the characterization of offer and demand in this kind of activity.

Survey on Marinas and Harbors, which allows the characterization of offer and demand in this kind of activity.

Business Tourism Survey, which also allows the characterization of offer and demand in this kind of activity.

Survey on the Golf operators which allows the characterization of supply and demand of golf camps, by year, month, NUTS II region, nationality.

Also, in relation to the flow of tourists, monthly information is available on passengers disembarked and embarked, by airport of origin and destination, in the main Portuguese airports. Monitoring who was traveling, where, when and for how long, allows an understanding of the air market for Portugal and the journey of tourists visiting the country, identifying mobility patterns and booking behavior of these tourists and anticipating market trends, by monitoring travel searches for Portugal, is available on TravelBI.

Thermal Baths and Spa Demand - Collection of data on supply and demand of Thermal baths and spas, by year, month, NUTS II region, visitor number, nationality.

Short-term Rental - Collection of data on supply and demand of short-term rental accommodation, by year, month, NUTS II region, nationality.

Museums Demand Performance - Collection of data on supply and demand of museums, palaces, and public monuments, by year, month, NUTS II region, visitor number, nationality.

2. Credit cards

Bank of Portugal publishes monthly data on spending by foreigners in Portugal, by nationality of the issuer. The information in question is fundamental for the knowledge of the issuing markets for Portugal in terms of its expenses in the territory.

We also have weekly and monthly information on the number and value of operations, bank cards originating in the main origin markets for Portugal. It allows disaggregating information by CAE and municipalities and it's available in TravelBI.

Annex 2 - List of relevant stakeholders

Stakeholder main activity	Project stakeholders' relevance	Relevance
Communities	<ul style="list-style-type: none"> Local community groups (residents); Private sector employees; Property and building owners (might live in the community or might be outsiders); 	Stakeholders that gather all relevant players in local communities.

Public sector	<ul style="list-style-type: none"> • Municipal authorities; • Regional authorities; • National ministries responsible for tourism and its key assets; • Other ministries and agencies in areas affecting tourism (e.g. transport, natural resources, environment, culture, infrastructure, planning, health, etc); • Agencies with an interest in the planning or maintenance of specific attractions (e.g., parks, protected areas, museums, marketplaces, cultural sites and events). • Universities 	Key stakeholder due to its mandatory power in domain of national/ municipal tourism policy and local tourist destinations.
Private sector	<ul style="list-style-type: none"> • Tour operators and travel agents; • Accommodation, restaurants and attractions, and their associations; • Transportation and other service providers; • Guides, interpreters and outfitters; • Suppliers to the industry; • Tourism and trade organizations; • Business development organizations. 	Stakeholders that gather all relevant players in private sector
Tourists	<ul style="list-style-type: none"> • Tourists • Organizations representing tourists' interests at the point(s) of origin; • International tourism bodies. 	

Annex 3 - Detailing relevant stakeholders

Type of stakeholders	Stakeholders
Municipalities Association	<ul style="list-style-type: none"> • Intermunicipal communities (NUTS III): <ul style="list-style-type: none"> - Comunidade Intermunicipal do Oeste - Comunidade Intermunicipal do Médio Tejo - Comunidade Intermunicipal da Beira Baixa - Comunidade intermunicipal das Beiras e Serra da Estrela - Comunidade Intermunicipal da Região de Leiria - Comunidade Intermunicipal da Região de Coimbra - Comunidade Intermunicipal da Região de Aveiro - Comunidade Intermunicipal de Viseu Dão Lafões • The 100 Municipal Councils of Centro region and 965 parish councils from Centro region

National/ Regional Entities	<ul style="list-style-type: none"> ● CCDRC - Centro Regional Coordination and Development Commission (https://www.ccdrc.pt/) ● ANA -- Aeroportos de Portugal (www.ana.pt) ● Turismo de Portugal (https://www.turismodeportugal.pt/pt/Paginas/homepage.aspx) ● Instituto Nacional de Estatística (www.ine.pt)
Regional Tourism Entity	<ul style="list-style-type: none"> ● Turismo Centro de Portugal (https://turismodocentro.pt/)
Associations	<ul style="list-style-type: none"> ● Tourism Sectoral Associations ● Entities managing programs for the valorization of endogenous resources (PROVERE) from Centro region ● Local action groups (GAL) and associations for local and regional development from Centro region ● Business Associations from Centro region ● Certifying entities of products and destinations tourism
Institutions of Higher Education in the Centro region	<ul style="list-style-type: none"> ● Universities <ul style="list-style-type: none"> - University of Coimbra - University of Beira Interior - University of Aveiro ● Polytechnics <ul style="list-style-type: none"> - Polytechnic of Leiria - Polytechnic of Viseu - Polytechnic of Tomar - Polytechnic of Castelo Branco - Polytechnic of Coimbra - Polytechnic of Guarda

Annex 4 - Regional Working Group of the Observatory

Councils	Members
1. Scientific Council (SC) (Research Units from Centro Region considered relevant to be represented in the Scientific Technical Council of the Centro de Portugal Sustainable Tourism Observatory)	Universities: <ul style="list-style-type: none"> ● University of Coimbra (Centro de Estudos Sociais (CES) Centro de Estudos em Geografia e Ordenamento do Território (CEGOT)). ● University of Aveiro (GOVCOPP - UA- Governance, Competitiveness and Public Policies Employment Observatory) ● University of Beira Interior (Núcleo de Estudos em Ciências Empresariais (NECE); Centro de Formação Avançada em Gestão e Economia (CEFAGE-UBI); - Centro de Investigação e Estudos de Sociologia (CIES-UBI)) Polytechnics:

	<ul style="list-style-type: none"> • Polytechnic of Leiria (Centro de Investigação, Desenvolvimento e Inovação em Turismo (CiTUR Leiria); Centro de Investigação Aplicada em Gestão e Economia (CARME)). • Polytechnic of Coimbra (Centro de Investigação, Desenvolvimento e Inovação em Turismo (CiTUR Coimbra); Centro de Estudos em Recursos Naturais, Ambiente e Sociedade (CERNAS-IPC)). • Institute Polytechnic of Viseu (Centro de Investigação em Serviços Digitais (CISeD)). • Institute Polytechnic of Tomar (Centro de Investigação, Desenvolvimento e Inovação em Turismo (CiTUR -Leiria); GOVCOPP- IP Tomar - Governança, Competitividade e Políticas Públicas. • Polytechnic of Guarda (Centro de Investigação, Desenvolvimento e Inovação em Turismo (CiTUR Guarda); GOVCOPP - IP Guarda- Governança, Competitividade e Políticas Públicas. • Institute Polytechnic of Castelo Branco (Centro de Investigação, Desenvolvimento e Inovação em Turismo (CiTUR Guarda); Centro de Estudos em Recursos Naturais, Ambiente e Sociedade (CERNAS-IPC)).
2. Business Advisory Council (BAC)	Intermunicipal communities: <ul style="list-style-type: none"> - Comunidade Intermunicipal do Oeste - Comunidade Intermunicipal do Médio Tejo - Comunidade Intermunicipal da Beira Baixa - Comunidade intermunicipal das Beiras e Serra da Estrela - Comunidade Intermunicipal da Região de Leiria - Comunidade Intermunicipal da Região de Coimbra - Comunidade Intermunicipal da Região de Aveiro - Comunidade Intermunicipal de Viseu Dão Lafões
	Tourism Sectoral Associations: <ul style="list-style-type: none"> - AHRESP - Associação da Hotelaria, Restauração e Similares de Portugal (https://ahresp.com); - TURIHAB - Associação do Turismo de Habitação (https://www.turihab.pt/PT/index.html) - AHRP - Associação dos Hotéis Rurais de Portugal (http://hoteisruraisdeportugal.com/) - ANCAT - Associação Nacional de Condutores de Animação Turística - APAVT - Associação Portuguesa das Agências de Viagens e Turismo (http://www.apavt.net.pt/)

	<ul style="list-style-type: none"> - APECATE - Associação Portuguesa de Empresas de Congressos, Animação Turística e Eventos (https://apecate.pt/) - APTECE - Associação Portuguesa de Turismo de Culinária e Economia (https://www.portugal-aptece.com) - APTERN - Associação Portuguesa de Turismo em Espaços Rurais e Naturais (https://aptern.pt/) - PRIVETUR - Associação Portuguesa de Turismo no Espaço Rural <p>Entities managing programmes for the valorisation of endogenous resources (PROVERE):</p> <ul style="list-style-type: none"> - DESTINATURE - Agência para o Desenvolvimento do Turismo de Natureza (https://www.inature.pt/inature/destinature/) - ADTAHP - Associação de Desenvolvimento Turístico - Aldeias Históricas de Portugal (https://aldeiashistoricasdeportugal.com/) - Associação das Termas de Portugal (https://termasdeportugal.pt/) - ADIRAM - Associação para o Desenvolvimento Integrado da Rede de Aldeias de Montanha (Início (aldeiasdemontanha.pt))
<p>2. Business Advisory Council</p>	<p>Local action groups (GAL) and associations for local and regional development:</p> <ul style="list-style-type: none"> - Agência de Desenvolvimento Gardunha 21 - ADAE - Associação de Desenvolvimento da Alta Estremadura (https://www.adae.pt/) - ADDLAP - Associação de Desenvolvimento Dão, Lafões e Alto Paiva - DUECEIRA - Associação de Desenvolvimento do Ceira e Dueça (https://dueceira.pt/) - ADD - Associação de Desenvolvimento do Dão (http://add.pt/) - Raia Histórica - Associação de Desenvolvimento do Nordeste da Beira (https://raiahistorica.org/) - ADIBER - Associação de Desenvolvimento Integrado da Beira Serra (https://adiber.pt/) - ADICES - Associação de Desenvolvimento Local (http://www.adices.pt/) - Coimbra Mais Futuro (CMF) - Associação de Desenvolvimento Local (https://coimbramaisfuturo.pt/) - AD ELO - Associação de Desenvolvimento Local da Bairrada e Mondego (https://www.adelo.pt/) - RUDE - Associação de Desenvolvimento Rural (https://www.rude-adr.pt/)

	<ul style="list-style-type: none"> - ADRUSE - Associação de Desenvolvimento Rural da Serra da Estrela (http://www.adruse.pt/) - ADERES - Associação de Desenvolvimento Rural Estrela-Sul (https://aderes.pt/) - ADRIMAG - Associação de Desenvolvimento Rural, Integrada das Serras de Montemuro, Arada e Gralheira (http://adrimag.com.pt/) - Pró-Raia - Associação Desenvolvimento Integrado da Raia Centro Norte (https://pro-raia.pt/) - Pinhais do Zêzere - Associação para o Desenvolvimento (https://pinhaisdozezere.pt/) - ADRACES - Associação para o Desenvolvimento da Raia Centro-Sul (https://adraces.pt/) - ADEPE - Associação para o Desenvolvimento de Peniche (https://www.adepe.pt/) - LEADER OESTE - Associação para o Desenvolvimento e Promoção Rural do Oeste - ADIRN - Associação para o Desenvolvimento Integrado do Ribatejo Norte (https://adirn.pt/) - AIDA CCI - Câmara de Comércio e Indústria do Distrito de Aveiro (http://aida.pt/) - Terras de Sícó – Associação de Desenvolvimento (http://www.terrasdesico.pt/) - Associação Geopark Estrela (https://www.geoparkestrela.pt/menu)
<p>2. Business Advisory Council</p>	<p>Business associations:</p> <ul style="list-style-type: none"> - ACA - Associação Comercial de Aveiro (https://www.acaveiro.pt/) - ACE - Associação Comercial e Empresarial (https://acee.pt/) - AEBB - Associação Empresarial da Beira Baixa (http://aebb.pt/) - NERC - Associação Empresarial da Região da Coimbra (http://www.nerc.pt/portal/index.php) - NERLEI - Associação Empresarial da Região de Leiria (https://www.nerlei.pt/) - AIRV - Associação Empresarial da Região de Viseu (https://www.airv.pt/) - AEA - Associação Empresarial de Águeda (https://www.aea.com.pt) - AEC - Associação Empresarial de Cantanhede (http://www.aec.pt/) - AEL - Associação Empresarial de Lafões – Vouzela (http://www.ael.pt/) - AEM - Associação Empresarial de Mangualde (https://www.aemangualde.com/) - AEMIRA - Associação Empresarial de Mira (https://aemira.pt/)

	<ul style="list-style-type: none"> - AE Soure - Associação Empresarial de Soure (https://aesoure.pt/) - AENEBEIRA - Associação Empresarial do Nordeste da Beira (https://aenebeira.pt/) - ADES - Associação Empresarial do Sabugal (https://www.ades.pt/) - ACISO - Associação Empresarial Ourém (https://www.aciso.pt/) - AESL - Associação Empresarial Serra da Lousã (http://aesi.pt/) - AECBP - Associação Empresarial da Covilhã, Belmonte e Penamacor (https://aecbp.org/) - AIRO - Associação Empresarial da Região Oeste (http://airo.pt/airo) - NERGA - Núcleo Empresarial da Região da Guarda (https://nerga.pt/) <p>Certifying entities of products and tourism destinations:</p> <ul style="list-style-type: none"> - Biosphere Portugal (https://www.biospheretourism.com/en/delegation/Portugal/4) - Associação Bandeira Azul da Europa (https://abae.pt/)
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Annex 5 - Supplemental issue areas of the Observatory

ISSUE AREAS	EXAMPLE OF INDICATORS	TravelBI AREA	STATUS	DATA COLLECTION
Tourist profile	<ul style="list-style-type: none"> - Tourist profile - Reason for visit (code: 088) - Tourist profile - Type of tourist (code: 084) 	Yes (to compare and complement the regional data)	Available ¹⁷	Annual survey by OTSCP in tourist offices
Resident profile	<ul style="list-style-type: none"> - Resident profile - Gender (code: 092) - Resident profile - Place of residence (code: 094) 	No	Available ¹⁸	Annual survey by OTSCP
Sectoral indicators (General and specifics indicators per sector in the tourism industry)	<ul style="list-style-type: none"> - Number of staff in post (reference month) (code: 001) - Personnel costs (salaries, social security, insurance, and others (code: 002) - Total income for the month (code: 006) 	Yes (to compare and complement the regional data)	Currently testing	Monthly survey by OTSCP in platform
Gender equality	<ul style="list-style-type: none"> - Percentage of tourism enterprises whose general management is headed by a woman by a woman (code: 032) - Percentage of men and women employed in the tourism industry (code: 004) 	No	Currently testing	Monthly and annual survey by OTSCP in platform

¹⁷ Available here: https://smat.observatorio-tcp.pt/estudos-regulares/#er_turismo

¹⁸ Available here: https://smat.observatorio-tcp.pt/doc/estudos_observatorio/INQUÉRITO ANUAL - A PERSPETIVA DOS RESIDENTES.pdf