MARKETING PLAN FOR THE TOURISM OF LISBON

CIÊNCIAS DA COMUNICAÇÃO (2º ANO) – MARKETING

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1. INTRODUCTION

The importance of tourism and its valorisation is indisputable in the economy of the Lisbon region. Through the implementation of a marketing process the region should be able to adapt its touristic products to the target markets and to optimize their performances, especially in a sector where international competition is constantly increasing.

The aim of this marketing plan is to analyze the trends in the global touristic market and the performances of the touristic products of the Lisbon region, to individuate strengths and weaknesses of the region in its target markets, and to suggest possible guide lines for the development and the promotion of the products according to selected growth objectives for the markets.

The diagnosis and most of the data upon which I refer are based on various official documents, such as marketing plans, surveys and case studies, developed by official internal and external organisms: Associação Turismo de Lisboa, Turismo de Portugal, Camara Municipal de Lisboa and World Travel and Tourism Council.

2. DIAGNOSIS

1. BRIEF DESCRIPTION OF THE AREA

Located at Europe’s westernmost point, midway between the north and south of Portugal’s western coast, the Lisbon region is second only to the Algarve in terms of tourist overnight volume in Portugal. It packs a great variety and choice for tourists in a small geographical area: from its sandy beaches along the Atlantic coast and the river Tagus to its famous squares and buildings in the city center, including museums and monuments, reflecting diverse architecture and culture spanning nine centuries. The pleasant year-round climate, an enviable safety and security record and an excellent range of quality hotels, places it in a privileged position as a holiday/leisure destination alongside other

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1 Lisbon – The impact of travel and tourism on jobs and economy, World Travel and Tourism Council, 2008
European capital cities. Main attractions include also golf courses, cuisine (mainly fish) and shopping, leisure and entertainment facilities, alongside with conference and congress facilities. Urban infrastructure is also well developed: a comprehensive transport network serves visitors well on their voyage of discovery around the city and the region, whether on foot, by electric tram, bus, metro or boat. Last but not least, Lisbon is also one of the capital cities with the lowest cost of living in Europe², with the big advantage, in comparison to competitor eastern capitals, of having the Euro as its own currency.

2. DESTINATION’S PRODUCTS / MOTIVATIONS:

   I. CORE PRODUCTS / MOTIVATIONS:

      • CITY BREAKS

   “City break” tourism is characterized by a combination of products which satisfy consumers whose principal motivation of interest resides in getting knowledge of the cities and their major monumental, architectonic, cultural, commercial, gastronomic attractions, in a short period of time (3 to 7 nights).³

   Three different typologies of this touristic product can be defined:

   • Standard city Breaks: tourists travel to a city willing to visit the main attractions in a wide variety of themes, staying in medium class hotels, looking for products and services with medium-low prices;
   • Upscale city Breaks: tourists travel to a city willing to visit the main attractions in a wide variety of themes, looking for high level services and accommodations, high level entertainment, cuisine, and all-over facilities;
   • Thematic city breaks: tourists travel to a city willing to visit attractions and live experiences related to a specific theme, for example a musical or sport event.

City break is a particularly competitive segment of the touristic market in Europe nowadays, given the huge choice of cities close to each other, with high population densities. In the last few years, Lisbon was one of the fastest growing destinations in Europe for this kind of tourism, growing faster than cities like Madrid, Paris and London, just behind the best practices (Prague and Barcelona); this growth is also related to the presence of international events in the region, notably Euro 2004.⁴

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² Lisbon – The Impact of Travel and Tourism on Jobs and Economy, World Travel and Tourism Council, 2008
³ PENT – Plano Estratégico Nacional do Turismo 2006-2015, Associação Turismo de Portugal
⁴ TLX10 – Plano Estratégico do Turismo de Lisboa 2007-2010, Associação Turismo de Lisboa
the principal motivation for tourism in the area.\footnote{5}

Lisbon has a great variety of cultural, monumental, architectonic attractions, with a great touristic appeal; the major ones, in terms of number of tourists, are: Castelo de São Jorge, Mosteiro dos Jeronimos, Torre de Belém, Sé, Padrão dos Descobrimentos.\footnote{6} Other notable attractions include the historical central quarters, the Parque das Nações, the Oceanarium, the 25th of April bridge, the Cristo Rei, the Gulbenkian Foundation and a vast number of museums around the city, as well as theaters and monuments. In the surroundings of the city we can also mention: Sintra, Casinò de Estoril, Santuario de Fatima, Cabo da Roca, and, in addition to these, the sandy Atlantic beaches and the Tagus estuary.

Lisbon has an image of human scale city, meaning that major attractions are within walking distance, making it easy to explore in a short period of time. The good climate throughout the year is another point increasing the enjoyability of the city, making Lisbon also valuable as a \textit{resort} city.\footnote{7} Low cost of living and of accommodations make the city a valuable choice for a standard city break, and the good level of high quality facilities makes it valuable also for an \textit{upscale} enjoyment. Lisbon also has a plan of events concentrated mainly in April and in the summer, with various festivals (music, theater, cinema, and so on); nevertheless, these events don’t have big international relevance; the city still misses an event capable of attracting international tourists for purposes of \textit{thematic} city break.\footnote{8}

- **Business and congressual tourism (MICE)**

Business tourism, including both corporate travels and the MICE (meaning “Meetings, Incentives, Congresses and Exhibitions”) segment, is characterized by a combination of products meant to satisfy people whose main purpose for visiting the city is the participation in congresses or business reunions, conventions, forums, business meetings and so on.\footnote{9} Lisbon’s business tourism appeal has benefited over recent years from its hosting of different international events, such as Expo ‘98 and Euro 2004, which have enhanced the city’s image in the international marketplace. But equally important have been the investments made in developing quality infrastructures for the meetings industry: Lisbon has a great number of facilities for this kind of activities, particularly in the most modern part of the city

\footnotesize{\textsuperscript{5} Ind. \textsuperscript{6} Observatório, Associação Turismo de Lisboa, abril 2008 \textsuperscript{7} Lisboa – The impact of travel and tourism on jobs and economy, World Travel and Tourism Council, 2008 \textsuperscript{8} TLX10 – Plano Estratégico do Turismo de Lisboa 2007–2010, Associação Turismo de Lisboa \textsuperscript{9} PENT – Plano Estratégico Nacional do Turismo 2006–2015, Associação Turismo de Portugal}
(Parque das Nações), partly as an heritage from Expo ‘98. The biggest of these is the 15,000-capacity Atlantic Pavilion concert hall.\textsuperscript{10}

According to the International Congress and Convention Association (ICCA), Lisbon was the eighth most popular destination for congresses in the world in 2004, as well as sixth in Europe. The average proximity of the main European business centers, Lisbon’ s well-developed infrastructure and perceived value for money, not to mention its huge potential for pre- and post-congress tours, make the Lisbon region a competitive business tourism destination.\textsuperscript{11}

- **Nautical Tourism**

Nautical tourism is characterized by a combination of products meant to satisfy people willing to have an active travel with the possibility of realizing activities connected with water, that is sport activities (such as windsurf, surf, kayak, sailing, and so on) as well as leisure nautical activities, such as leisure boating and cruises.\textsuperscript{12} In the Lisbon region nautical tourism is represented mostly by cruises, with good resources for the development of nautical activities and nautical sports. Lisbon has an excellent geographic position to represent a port for cruises, as well as to intercept private touristic yachts following international routes in the Atlantic, but the existing infrastructures barely cover the present internal demand.\textsuperscript{13} The product cruises is seeing in the last years a fast worldly growth (5%) and the growth pace is even faster in the Mediterranean Sea (6,6%).\textsuperscript{14} Lisbon is a natural attraction for this kind of tourism, because of, other than its geographic position, its good climate all over the year and the city’s appeal as a touristic destination.

The Lisbon region boasts many different spaces where nautical sports can be practiced, such as the Tagus estuary and all the Atlantic coast, especially with the beaches of Costa de Caparica, Carcavelos, and Cascais; these places could see a better touristic development for these activities, being now utilized for this purpose mostly by the locals.

- **Golf Tourism**

Golf tourism is characterized by a combination of products meant to satisfy people whose main
purpose for visiting the area is playing golf.\textsuperscript{15} The golf market is of increasing importance to destinations all over the world, recording an annual growth rate of 7 per cent in demand in the last years. Golf tourists spend on average €260 a day and expect quality accommodations: four or five stars hotels/resorts with integrated golf courses.\textsuperscript{16}

The Lisbon region boasts a significant share of the country’s golf facilities: of the 70 golf courses across the country, 22 are located in the Lisbon region and, among these, eight are on the \textit{Costa do Estoril}; this is a much appreciated destination by golf enthusiasts, because it combines golf facilities with unique leisure attractions and with modern facilities and infrastructures, such as a marina, casino and congress center. The Lisbon region is one of the few European capital regions that offers a true golf tourism destination, in that it possesses countless ‘pay and play’ golf courses, which are not totally reserved for the use of club members. The Lisbon coast was recently voted the best golf destination in Europe by the \textit{International Association of Golf Tour Operators} (IAGTO).\textsuperscript{17}

II. \textbf{COMPLEMENTARY PRODUCTS / MOTIVATIONS:}

The region possesses a number of touristic attractions that can be a factor of enhancement for the value proposition of the main products, and that can also be a motivation for the development of new market segments, now under-represented in the region. These under-developed markets include sun & sea, health & well-being, fashion, nature tourism, gastronomy and wine, religious and residential tourism.\textsuperscript{18} Gastronomy, in particular, could be an enhancement of the value proposition especially for those markets composed by the “well-established” segment (high-spenders with 40 to 59 years), for example those composing golf and business tourism segments; the Lisbon region, and Portugal as a whole, have a great heritage in this sphere, possessing peculiar traditional dishes like \textit{bachalau} and seafood in general, as well as prestige wines. Fashion is another enhancing factor, especially for young people interested in city breaks, as well as high-spenders middle-aged persons; the central quarters of Baixa-Chiado and Rossio are well-equipped for these purposes, but this market is still under-represented\textsuperscript{19}. The sun & sea market could see a better development, especially in areas like \textit{Costa da...
Caparica and the Estoril coast that could have an enhancement especially through the organization of water sports events, aimed to promote the image internationally. Religious tourism could possibly be a motivation for thematic city breaks for the elder segments of the market, the region including some religiously important sites like, at first, Fatima and all the sites connected with the tradition of Sant’Antonio.

3. DESCRIPTION OF DEMAND AND TARGET CONSUMERS:

Among all the different regions of the country, Lisbon is the one that attracts the most diverse international demand. In 2006, the Spanish market was the largest source of foreign tourist overnights in the region (a 23 per cent share of the total); it was followed by Germany, Italy, UK and France. Spain was the origin of 60% of the overall tourism growth in number of tourists in the last five years. The marketing plan TLX10, developed by Associaçao Turismo de Lisboa, defines three target markets: the strategic market is composed only by Spain, for the reasons mentioned above; second priority markets are the major European markets (especially France, Germany, Italy, UK) as well as Brazil and USA, that already have a good share in the number of tourists visiting the region, as well as a medium growth pace; markets with high and medium potential are Belgium, Holland, Ireland, as well as Scandinavian and eastern Europe nations, having still a low overall number of visitors in the region, but a high potential for growth and had a high growth pace in the last years.

Other than the nationality, the tourists coming to the city differ for many aspects, according to age, status, academic level, occupation, interests, spending power, and so on; Associaçao Turismo de Lisboa carried out various surveys to get a deeper knowledge of the various market segments according to each main touristic product. Here comes a deeper analysis of the core market segments:

- **City breaks**

The majority of tourists that come to visit Lisbon are on short city breaks (51% in 2005); the market of this kind of product is constantly growing, being the major motivation of worldly growth in the overall number of tourists. City/short breaks attract tourists of all ages, from young singles to families and senior citizens; the main reasons to choose the city for a visit are its weather, its geographic position

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20 TLX10 – Plano Estratégico do Turismo de Lisboa 2007-2010, Associação Turismo de Lisboa
21 Ibid.
22 PENT – Plano Estratégico Nacional do Turismo 2006-2015, Associação Turismo de Portugal
and topography, its history and monuments, its architecture, its offer in terms of museums and entertainment facilities;\textsuperscript{23} during the last years, Associação Turismo de Lisboa carried out a survey among the low-cost passengers of companies with operate at the Lisbon Airport; from the results of this survey, we notice that the average low-cost passenger that travels to-from Lisbon is a male (56.4%) between 25 and 34 years old (33%), with a university degree (60%), that travels to Lisbon for leisure and chooses the flight for its price; although the majority is professionally active, 10% of the passengers are students. The flight is generally booked through the website of the company, as well as the accommodation (generally in a hotel in Lisbon city), with an average stay from 3 to 7 nights; the passenger travels alone or with his partner, has a high level of satisfaction with the city and intends to come back in the next two years. One of the crucial motivations to choose Lisbon as the destination of the trip is the presence of a low-cost connection at a low price.\textsuperscript{24}

- **BUSINESS AND CONGRESSUAL TOURISM (MICE)**

The business tourism market segment is made up mainly by high-qualified professionals, with high academic level and high spending power; a survey carried out by Associação Turismo de Lisboa lets us know more about this particular segment. Form the results of the survey, it’s possible to infer that the main countries of residence of the people coming to the city for business related reasons are UK (15.5% in 2008) and Spain (11.5% in 2008, 17% in 2007) followed by France, Holland, Italy, Germany and Denmark. The average business tourist is a male (around 65%) aged between 46 to 55 years old, generally holding higher academic studies, like a post-graduation, a PhD or a master. Most of the business tourists prefer an accommodation in hotel units, mainly 4 or 5 stars hotels (84% of the preferences) and come to the city with a direct flight; low-cost companies represent a share of 19% on the total of the flights. The global evaluation the visitors give to the city as a congress center is higher than average (8.2 on 10); most valued criteria are the quality of the services at the congress center and the price of transportation, while the less valued criteria is the quality of the services at the airport. The average stay is 4.4 overnights.\textsuperscript{25}

\textsuperscript{23} TLX10 – Plano Estratégico do Turismo de Lisboa 2007-2010, Associação Turismo de Lisboa
\textsuperscript{24} Survey to low cost passengers, Associação Turismo de Lisboa, 2008
\textsuperscript{25} Survey to congress participants, Associação Turismo de Lisboa, 2008
• **Cruises**

Following the results of a survey carried by *Turismo de Lisboa*, is possible to get a deeper knowledge of the cruise passengers visiting the city of Lisbon. Regarding the nationality of the passengers, more than half of the interviewed passengers are British; in second place, by far, come the USA, followed by Italy and the main European markets. Most of the passengers are male, with an average age of 53 years old; the large majority is married with children.

The average passenger is professionally active and has a high academic level; in general, he has already done at least one cruise before this one and mainly used the travel agency (cruise companies in second position) to gather informations about the cruise and to book it. The choice was made mainly taking into account the quality of the restaurants on board, the resting conditions and the entertainment activities; the inclusion of Lisbon is considerably important in this choice. This passenger choose to visit Lisbon on his own, average time spent in the city being around nine hours. The sources of information more relevant to the decision of visiting the city was the advice of friends and/or family, while the determinant factors were the weather, the gastronomy and the landscape. Regarding shopping in the city, the highlight goes to handicraft and pastry; the average amount of money spent in the city is around 42€, mainly for food, shopping and transportation.

The level of satisfaction with the city is high; weather, security and cleanliness are the most valued criteria in a specific evaluation, while the least valued were the fastness of the access to the city and the fastness of embarkation/discharkation procedures.

The probability of returning to Lisbon is, on average, 58,7%; almost everybody strongly recommends Lisbon as a port for cruises.26

• **Golf tourism**

According to some international studies, the typical golf tourist is 40-plus years old, with a high level of education, and with an upper middle-class to upper class socio-economic profile.27 The decisive role of golf in the tourism strategy of the region, and its increasing importance have led *Turismo de Lisboa* to carry out a survey among the golf tourists coming to the region, in order to get a deeper knowledge of

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26 *Survey to international cruise passengers, Associação Turismo de Lisboa*, 2008
27 *Lisbon – The impact of travel and tourism on jobs and economy, World Travel and Tourism Council*, 2008
the segment. From the results of the survey we infer that more than half of the foreign golf players resides in the UK or in one of the Scandinavian countries. Most of the players are men (55%), hold a university degree and are professionally active (except for a 20% of retired people). The majority of the interviewed golf players choose an accommodation in the area of Estoril-Sintra, with an average stay of four nights; the preferred accommodation are 4 or 5 stars hotels.

The main source of information to take the decision of making the trip to the region was the advice of familiars and/or friends followed by golf magazines. The principal motivation for choosing the region as a destination was, in first place, the low price, followed by a previous satisfactory visit and the good weather. The most valued criteria by the players were the price of the accommodation and the quality of the golf courses; almost everybody recommends the region as a golf destination, and the satisfaction level within the visit is higher than average.28

4. Competitors: description, competitive advantages and disadvantages

The main touristic product of the Lisbon region, as already said, is “city break”; major European cities are constantly competing in this particular market, increasing the number of attractions, and the quality of services and facilities. In the European market, the 89% of city break travels has European cities as a destination, especially in the South and West of Europe. London is the market leader, without direct competitors having about 80 millions of overnight tourists. Paris and Dublin, in second position, can count on 15 to 20 millions of overnight tourists. On a third level we have cities like Rome, Barcelona and Prague, counting on 5 to 10 millions of overnight tourists. Lisbon (intended as a region) is on the next level, having from 2 to 5 millions of overnight tourists, on the same level of Florence and Berlin.29 Competitor cities are developing their offer, improving the quality of the urban environment, the entertainment facilities, enhancing the diversification of touristic products and improving accessibility, both through air connections (especially low-cost) and rail and road access (especially high-speed trains).30 Competitor cities are increasing their investments in international promotion, both through big events of international relevance and direct promotion, especially on the Internet. Barcelona realizes every year huge events of international relevance, with a priority on expositions, forums and

28 Survey to foreign golf tourists, Associação Turismo de Lisboa, 2008
29 http://www.euromonitor.com/Trend_Watch_Euromonitor_Internationals_Top_City_Destinations_Ranking
30 TLX10 – Plano Estratégico do Turismo de Lisboa 2007-2010, Associação Turismo de Lisboa
sport events; both London and Barcelona promote events in their metropolitan area, and are investing to improve the quality of the local experience and the satisfaction for the tourists.  

In comparison with competitor cities, it should be noticed that Lisbon has a higher number of 4 and 5 stars rooms in percentage, and the price of this kind of accommodations is lower than the average.  

Nevertheless, the total price of the city break is slightly superior to that of the competitors. One of the possible reasons could be the accessibility, especially regarding air connections: Lisbon has a lower number of low-cost connections compared with the competitors, and the price is higher, on average, as it’s the length of the air trip from the main European centers.  

A peculiarity of the city and the region is of being one of the few major cities directly on a sea/estuary of a river; another factor of competitive diversification is the climate: the weather is warm for most of the year, and the region has one of the highest numbers of sunny hours during the year in Europe. Among the characteristics of the city, to be noted as a possibility to develop a competitive advantage are the rich history of the region, its particular topography, as well as the many possibilities for the tourists to have diversified touristic experiences.

Lisbon is one of the main regions in Europe for golf tourism, having been voted recently the best golf destination in Europe by the International Association of Golf Tour Operators (IAGTO). France, Italy, Spain, UK and so on compete with the Lisbon region in this field. Actually, just a few of these (notably Spain, Turkey and Tunisia) have the same characteristics and a similar offer: these regions are mostly famous for “Sun&Fun” golf tourism. Other destinations, like UK, Scotland, Ireland, have a slightly different target, being notable mostly as prestige destinations. Lisbon has room to grow in this particular segment, addressing the “prestige” target. 

For what concerns business tourism, the city is already well established as a major destination for small congresses (up to 50 participants), having been 8th in the world and 6th in Europe in 2004, best practices being Barcelona, Vienna, Copenhagen and Paris. For what concerns biggest congresses (more than 300 participants) the city was only 22nd in the world in 2004, in a ranking guided by Paris, Vienna, France, Italy, Spain, UK and so on compete with the Lisbon region in this field. Actually, just a few of these (notably Spain, Turkey and Tunisia) have the same characteristics and a similar offer: these regions are mostly famous for “Sun&Fun” golf tourism. Other destinations, like UK, Scotland, Ireland, have a slightly different target, being notable mostly as prestige destinations. Lisbon has room to grow in this particular segment, addressing the “prestige” target. 

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31 TLX10 – Plano Estratégico do Turismo de Lisboa 2007-2010, Associação Turismo de Lisboa
32 IBI.
33 Lisbon – The Impact of Travel and Tourism on Jobs and Economy, World Travel and Tourism Council, 2008
34 PENT – Plano Estratégico Nacional do Turismo 2006-2015, Associação Turismo de Portugal
3. Objectives:

To individuate precise countable and defined objectives is not the aim of this work, as it’s not supposed to be actually implemented, and it neither has a budget to count on, but it’s just a suggestion for a marketing strategy. Nevertheless, some objectives can be defined in a general way, keeping in mind what is the importance of tourism in the region, and what are the possibilities for a sustainable growth.

The strategic importance of tourism for the region is indisputable: its economic contribution is critical for wealth generation, for employment creation and to improve the well-being of the population; tourism contributes to 9,1% of gross domestic product (in 2007), a share that is supposed to grow by 4,6% every year in the upcoming decade; this will bring to a contribution of 11,3% to the gross domestic product in 2017. In employment terms, tourism accounted for 9,8% of total employment in 2008, and is supposed to grow its importance to 13,3% by 2017. Both of these rates are higher than the average for Portugal and for the European Union. The strategy of the region should bring these forecasts to reality, keeping in the mind that the market is increasingly challenging and emerging is becoming more and more difficult.

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35 Lisbon – The Impact of Travel and Tourism on Jobs and Economy, World Travel and Tourism Council, 2008
36 Ind.
1. Quantitative

I. Increase in the number of visitors per product

The main objectives for the tourism of the city are to bring performances in line with the best practices for what concerns the core products/motivations, in terms of number of visitors per product, and to develop under-represented markets. For the main products, a priority should be given to city breaks, as it appears to be the market with the highest growth rate overall, and the main source of tourists for the region; the city should be able to gain more and more shares of the European market, managing to reach a growth pace similar to those of Barcelona and Prague (the cities with the best growth rate) with the goal, in a few years, of reaching cities on the higher level in terms of tourist overnights, like Vienna, Prague and Amsterdam.37

The attention should be addressed mainly to the strategic market (Spain) and the priority markets (Germany, UK, France, Italy), with the purpose of increasing the visitors share. The new developing markets should also be a target, but the city must, firstly, adapt its services and the connections (mainly air connections) to these emerging markets. Business tourism is another priority: the city is already established as an important Mice destination for small congresses (around 50 participants), being in the first places in the world for this ranking (6th in 2004) but still has room to grow in the biggest ones (up to 300 participants), where it’s not in the top rankings (22nd place in 2004)38; to increase the number of visitors in this segment should be a priority objective.

II. Increase in the revenues

The tourism sector has globally seen in the last years a reduction of RevPAR (Revenues per available room), determined by a growing in the number of hotel availability superior than the growth pace in the demand.39 To increase the revenues for the region, and particularly the RevPAR, the suggestion is to improve capacity in 4 to 5 stars hotels, as the segments of demand “well established” (high-spenders with 40 to 59 years of age) are supposed to increase, as are supposed to increase the golf and business segments. It is either necessary to increase the share of visitors’ spendings in tourism services in the city, as well as touristic exports, as they play a strong part in Lisbon’s tourism business.40

37 HTTP://WWW.EUROMONITOR.COM/TREND_WATCH_EUROMONITOR_INTERATIONALS_TOP_CITY_DESTINATIONS_RANKING
38 LISBON – THE IMPACT OF TRAVEL AND TOURISM ON JOBS AND ECONOMY, WORLD TRAVEL AND TOURISM COUNCIL, 2008
39 TLX10 – PLANO ESTRATÉGICO DO TURISMO DE LISBOA 2007-2010, ASSOCIAÇÃO TURISMO DE LISBOA
40 LISBON – THE IMPACT OF TRAVEL AND TOURISM ON JOBS AND ECONOMY, WORLD TRAVEL AND TOURISM COUNCIL, 2008
2. **Qualitative**

   **I. Enhancing the Awareness and the Perception of the Brand**

According to the various surveys’ results among visitors, foreign tourists rate their experience of the city as either “excellent” or “very good”, and one far exceeding their expectations. This is without doubt a mark of the quality of the region as a touristic destination, and it means that the product is well perceived, but it can also mean that the image of the brand “Lisbon region” isn’t as strong as the quality of the product is, making it necessary to bring in line the image of the product with its actual value in terms of satisfaction for the visitor; the product perception of the visitor is way superior than the image the product has. To enhance awareness making the Lisbon brand a “top of mind” in the market, and improving the city’s image perception among the targets is one of the goals of the marketing strategy for the region.

At the same time, it’s strongly necessary to maintain tourist satisfaction at high levels, with the purpose of encouraging buzz and repeated visits; “word of mouth” is the strongest tool for the promotion of the city.

   **II. Overcoming the Problem of Seasonality**

The development of tourism in the area reflects a problem of seasonality: a breakdown of tourist overnights in registered commercial accommodations by month highlights a strong peak in August with secondary peaks in September, October, April and May. The peak winter months (January and February) show a marked trough. It should be noted, however, that this seasonality is more marked in
foreign than in domestic tourist overnights. Average length of stay fluctuates between a maximum of 2.6 nights in August to a minimum of 2.0 nights in January.\(^41\)

It is necessary to overcome the problem of seasonality, increasing the overnights volume especially in the winter and autumn months. A possible solution could be the diversification of the touristic products in the region, promoting markets that, in spite of good possibilities, aren't fully developed yet in the region and are not affected by seasonality; to give an example, the cultural-museums and the fashion segments are under-represented in the city, as well as the market of thematic city breaks. It is either necessary to give higher attention to those products already developed in the region that aren't affected by this tendency (for instance golf and business tourism), trying to increase the share of market in these segments. Golf, in particular, offers an excellent opportunity for the Lisbon region to reduce seasonality, since the preferred golf holiday periods are during the spring and autumn shoulder months.\(^42\)

4. **Strategic Options:**

1. **Reinforcement of the Value Proposition**

It seems necessary, as a strategic option to enhance the performance of the city’s touristic products in the markets, to innovate its value proposition, adding factors like modernity, authenticity, and diversified experiences in the same place to the value proposition that was already developed in the previous marketing plan of the city (this including history, human scale and resort)\(^43\). The two main centralities of the region could develop diversified value propositions: the Estoril coast could mainly develop the value of a resort area, with high quality facilities and the possibility to practice water sports and nature-based tourism; Lisbon city values as a resort city, modern and authentic, with a great historic relevance, human scale, and a wide offer for different experiences all over the year. The rich history of the region must have a more important role in the development of the touristic features of the region; there is an opportunity for the region to develop world-class attractions, including museums, and historical and educational centers. Such investments would help the region project its

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\(^41\) Lisbon – The Impact of Travel and Tourism on Jobs and Economy, World Travel and Tourism Council, 2008

\(^42\) Lisbon – The Impact of Travel and Tourism on Jobs and Economy, World Travel and Tourism Council, 2008

\(^43\) TLX10 – Plano Estratégico do Turismo de Lisboa 2007-2010, Associação turismo de Lisboa
historic heritage to a wider international audience, as well as better informing local residents and visitors, and raising the international profile of the region as a major cultural destination.

2. **Regeneration and Renewal**

With the purpose of delivering in a believable way a value proposition of modernity for the city, of innovating its image and developing a new brand for the region, it’s necessary to implement a process of renewal and regeneration of the urban assets, in terms of buildings, squares, infrastructures, services (thus meaning also police vigilance and services to enhance the cleanliness of the city), but also concerning the bureaucratic system and the accommodations offer. The city center has many old buildings and monuments in a poor state of conservation, sometimes adding badly to the city’s decadent and old image. The vast majority of historic buildings in the Lisbon region, which are of particular architectural interest, are occupied by national or regional public entities. This is different from the situation in other major European capital cities, where several such assets are turned into luxury hotels, museums, tourist attractions and other facilities for public leisure, recreation and entertainment. The restoration of old monuments and architectural heritage must as well be a priority. Innovative products related to national traditions could be developed, and can be motivating factors for potential visitors. Regenerating and investing in the river fronts, namely in the city of Lisbon between Belém and Santa Apolónia, and in the sea fronts in the surrounding areas, is a crucial investment for the development of the area. The upgrading of central pedestrian areas and the development of fashionable districts is another possibility in the optic of promoting a modern image of the city.

3. **Creation of the Brand “Lisbon”**

Given the highly competitive environment where cities across the world operate, Lisbon will need to be extremely focused in marketing and promoting its unique peculiarities; by developing a collection of differentiated attractions, aimed at maximizing the potential of its unique historical, natural and cultural assets, the Lisbon region will be able to create its own brand, or strategic space, in the global tourism market. A brand offers potential visitors a promise of the experience that they are likely to enjoy in a given destination, which may include the promise of iconic sites that they will be able to see

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44 *Lisbon – The impact of travel and tourism on jobs and economy, World Travel and Tourism Council, 2008*
and a unique set of experiences easily identifiable as a unique proposition for the given city. Lisbon’s international competitors have been careful to identify and promote iconic landmarks, which can be easily identified by target audiences; as an example, *Big Ben* or the *London Eye* in London, the *Eiffel Tower* in Paris, or the *Sagrada Familia* in Barcelona are instantly recognizable; a city like Bilbao, which until few years ago was out of the map of the average tourists, has based its requalification mostly on the wide international promotion of the iconic *Guggenheim Museum*. It’s necessary for Lisbon to promote the landmarks of its region in a similar fashion, positioning them among the world’s most recognizable tourism brands. Iconic landmarks of the city are mainly connected to the fascinating history of the city, mainly allied to the ocean and the age of the great maritime explorers; traces of this history are clearly evident throughout the city and the maritime image is of great importance to its residents. One only has to mention the 16th century naval fortress tower, the *Belém Tower*, and the *Jeronimo’s Monastery*, classified as a *World Heritage Site* by UNESCO. These monuments mark the very spot from which the great Portuguese maritime explorers set out in their caravels in the 16th century to discover new and exotic worlds, and are the most recognizable icons of the city; the marketing strategy of the city should include a strong international promotion of these icons. A strong image of the city is also given, in my opinion, by the *25th of April Bridge*, because of a strong association with San Francisco’s *Golden Gate Bridge*, an image which is already well established in the minds of people all over the world; this landmark is a good icon for the promotion, as it suggests a strong idea of modernity (as an association with the American city) and it’s a peculiarity of the city that none of the European competitors have.

4. **Development of peculiar Portuguese contents**

In the increasingly challenging European tourism market, it becomes more and more necessary to develop and promote peculiar contents to create differentiation and competitive advantages for the city in comparison to the competitors. Developing peculiar Portuguese contents is also a way to enrich the value proposition of the brand, promoting a range of peculiar experiences that can only be experienced in this area. Example of traditional Portuguese contents to be developed include the rich gastronomy (mainly seafood and prestige wines), *fado* music, *azulejos*, the traditional literature and the popular festivities like *Sant’Antonio*. The architecture of the city, its many typical neighborhoods, the
traditional shops, restaurants and cafés today stand as a rich testament of the city's history and tradition. The city atmosphere, its blend of tradition and modernity, its particular luminosity, the beauty of its traditional buildings have inspired writers, poets, photographers and film producers, and stand still as a peculiar content to enhance and promote.

5. **Diversification of the Products**

The majority of tourists who currently visit the Lisbon region are on short city breaks (51 per cent in 2005), or traveling for business-related reasons (37 per cent). However, there are many other products using the region's natural assets that could be further developed, as well as better marketed and promoted. These include products for market segments interested in sun & beach, culture and fashion, water sports, nature-based ecotourism, health and well-being, cuisine and wine. The city also has a high number of museums spread around the city, but it misses a museum with strong international appeal; a wide promotion in this sense is desirable. The *Tagus* and *Sado* rivers have a huge potential for tourism activities, but they are way under-utilized, missing an organization in terms of infrastructures and accessibility, as well as a good marketing and promotion. It seems necessary to undertake a concerted investment program so as to tap the opportunities for urban regeneration along the entire river and sea coasts.

The Estoril Coast offers a wide range of opportunities for swimming and water sports – sailing, surfing and wind surfing – as well as golf, horse riding and other sporting activities. Cascais and the neighboring towns, which are located on the coast close to Lisbon, boast a pleasantly warm and mild climate year round, are lively both during the day and at night, and provide high-quality facilities for business and leisure tourists. Thanks to the attractiveness and quality of its beaches, it is an ideal destination for those seeking holidays in the sun, and/or intending to purchase a secondary residence/holiday home. The Sintra district could be an even more important destination for cultural, nature based and residential tourism, due to its rich cultural and historical heritage, and to the fact that it is surrounded by the *Serra de Sintra* hills. And the Setúbal Peninsula could as well enrich the area’s tourism potential, offering excellent conditions for golf, ecotourism and sun & beach holidays.

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45 Lisbon – The impact of travel and tourism on jobs and economy, World Travel and Tourism Council, 2008

46 O TEJO COMO PRODUTO TURÍSTICO, Vieira Costa, Associação Turismo de Lisboa, 2007
5. **Operative Plan:**

1. **Product:**

   I. **Development of micro-centers of interest**

   The region extends across a vast land mass and covers several small and distinct communities, towns and districts, which possess contrasting tourism attractions. Moreover, many of Lisbon’s attractions are unique to the region, so they are able to ensure an unparalleled, authentic tourism experience for visitors. It would be desirable a strategic focus on planning and development for each district, with an emphasis on each district’s unique attributes and opportunities. This will bring to an organization of the touristic experience in clusters, with each district promoting its main peculiarities and attractions, gaining in appeal and making it easier to focus the investments and to enhance the value proposition.

   The strategic plan for the tourism of the region\textsuperscript{47} identifies two macro-centralities at the region level and several micro-centralities at a lower level. The Estoril-Sintra region and the Lisbon city represent the macro-centralities. The micro-centralities are many across the region; at the city level, we can distinguish three of them: the historic center include the axis Baixa-Chiado, Alfama-Castelo-Mouraria, Avenida da Liberdade-Parque Eduardo VII, and Bairro Alto-Santos; the historic center represents the soul of the city, where the history, the culture, the traditions of the capital city of Portugal blend together with the economic daily activities and the everyday life of the local population. Belém is conceived as a museum and cultural area with a particular emphasis on the discovery age and the deep connection with the sea; it’s also connoted as a gastronomic quality center. The Nation’s Park is positioned as a center for the meetings industry and the corollary of modern Lisbon.

2. **Regeneration of the urban environment**

   Enhancing the urban quality of buildings, the organization and the functionality of public spaces, miradouros, artistic illumination of buildings, and so on, are necessary ways to capitalize the existing assets and transmitting an idea of modernity. Regeneration and innovation initiatives should be centered in the given micro-centralities, capitalizing on existing strengths and overcoming any weaknesses. As far as the Alfama-Castelo-Mouraria region is concerned, for example, urban
rehabilitation, improved police vigilance and easy access from Baixa are notable issues for improvement; in the Avenida da Liberdade, the regeneration of Parque Mayer and Rossio Station will help to attract new hotels, new brand development, and further tourism related investment. In the area of Baixa-Chiado it’s possible to develop fashionable districts with internationally branded retail outlets offering high quality products, as well as districts offering particular cultural or architectural interest; at the same time, in the center is possible to develop areas set out for nighttime and daytime entertainment and leisure facilities, in which restaurants, bars, esplanades and cultural entertainment would predominate.

The restoration of old monuments and architectural heritage, such as the facades of old buildings, pavements, parks, esplanades and pedestrian areas, must be a priority; ancient buildings for collective use, such as old palaces currently underutilized, could be turned into museums or luxury hotels. It’s either necessary to invest in the river fronts, namely in the Lisbon city between Belém and Santa Apolónia, and in the sea fronts.

The regeneration and restoration projects spread across the Lisbon region can be a vital tool for the creation of new jobs, career opportunities and wealth. However, any efforts in this regard will not succeed if they are seen as a one-off shot. They will have to be part of a long-term phased policy, with correspondingly phased programs and short- as well as long-term objectives.

III. EVENTS: CREATE A PROCESS FOR DEVELOPING REGULAR EVENTS

Lisbon nowadays has a calendar of events mainly concentrated in April and the summer months (especially July and August), in particular cultural events: music, theater and cinema festivals; nevertheless, none of them is capable of arousing wide international attention. It is fundamental, in the optic of increasing the number of tourists, to promote events of international relevance that can possibly lead to the development of a market for thematic city breaks and also project the city’s image among the target markets; the promotion of this kind of events especially in autumn and winter, and the subsequent related thematic tourism, could be a valuable way to reduce seasonality in the overnights volume, ensuring an equilibrate and sustainable growth. Lisbon misses sport events of international relevance, as well as big typical celebrations, or important nautical and gastronomic

48 TLX10 – Plano Estratégico do Turismo de Lisboa 2007-2010, Associação Turismo de Lisboa
events. An event related to the maritime heritage of the region, such as an ocean festival, could be a possible way to enhance the value proposition and the notoriety of the region’s brand. Other than events of promotional nature, it’s either necessary to develop street entertainments that can improve the local experience of tourists, and also to program intensively the city’s performance venues, promoting them internationally.

IV. DEVELOPMENT OF MICE FACILITIES

The Mice segment is already an important market in the Lisbon region, but it could see an even better development especially in the segment of big congresses (meaning events with more than 300 persons). The city could improve its offer for this market segment by enhancing the availability of infrastructures and facilities dedicated to this kind of congresses, as well as the organization of services dedicated to the segment and, most of all, an action of intensive promotion addressed towards the segment. The development of high quality entertainment facilities, restaurants, and the improvement of the accessibility are other points to keep in mind for enhancing the offer for the segment.

V. DEVELOPMENT OF CRUISES AND NAUTICAL TOURISM

Although cruise business is already an important tourism segment for the Lisbon region, it could be an even more dynamic segment of the market. As an example, the region could benefit from increased ‘cruise and stay’ business: cruises followed by several nights stay in the area; another segment that has room to grow is “turnaround cruises”: cruises that see Lisbon as a destination with the return travel made by airplane. At the same time, the growth in transit passengers through the Port of Lisbon is important and should not be undermined.

It’s critical that the cruise passengers’ experience of Lisbon is a good one as these tourists could return in the future to get to know the city and surrounding region better, accompanied by other family members or friends; the construction of the new cruise ship terminal is a critical investment.

To improve the utilization of the Tagus and Sado rivers in touristic terms it’s necessary to improve the organization of the products in terms of infrastructures and accessibility, as well as implementing a good marketing and promotion strategy. It’s necessary to create more places where is possible to dock the boats along the rivers, to equip the rivers and the coast with infrastructures for the reception

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49 Ibid.  
50 O Texto como produto turístico, Victor Costa, Associação Turismo de Lisboa, 2007
of big yachts, to improve the services for the boats and to promote the image of the river as a venue for nautical tourism. The creation of international events, mainly of sport nature, both in the river and in the Atlantic coast, could be a way to promote the image of the place and put it in the international map of the segment. If the events have big relevance, they could possibly bring to the development of thematic city breaks, or represent an enrichment in the overall touristic offer.

VI. COMPLEMENTARY PRODUCTS

To improve the performances of complementary products in the area is necessary, in first place, to enhance the awareness of the city in the international tourism market, as already said through the creation and development of the brand “Lisbon” and through intensive promotion on various media and prescribers. Accessibility is another feature to improve (it will be thoroughly examined in the dedicated point).

To improve the development of water sport tourism, it’s necessary to develop the infrastructures and the facilities dedicated to these sports, as well as promoting international events related to them (in venues like Carcavelos, Costa de Caparica, Albufeira), as the whole area is already provided with good natural resources for these purposes. Fashion tourism could be improved through the promotion of the central fashion districts, that is, Baixa-Chiado and Rossio-Avenida da Libertade, as well as Bairro Alto which could be a differentiating element for the city in the segment, being endowed with many Portuguese fashion boutiques and design shops. Culture/museum tourism can be improved; the city has a wide number of museums spread around the city, but it misses a big name with international appeal immediately recognizable and strongly tied with the name of the city like, for example, the Louvre for Paris, the National Gallery for London, the Guggenheim for Bilbao. Choosing some museums, enhancing their contents and promoting them internationally trying to enhance their appeal could be a way to promote the entire culture segment for the city; objects of the promotion could be, for example, the Gulbenkian Museum, the Tile Museum and the Fado Museum.

VII. DEVELOPMENT OF HUMAN RESOURCES AND SERVICES STANDARDS

There’s a deep link between the tourism experience and the quality of service delivery; a positive and lasting impression, based on the relationship of a visitor and the service provider, helps to support word of mouth, as well as encouraging repeat visitation. Tourism also offers an opportunity to create
lasting career opportunities for local residents, who are at the same time ambassadors of the region and the country as a whole. The region must invest in developing human capital to deliver service excellence and to promote career development for employees looking to attain management levels and become leaders in the industry.

It is necessary to ensure that the right level of skills are defined and that training programs are competitive with the best international standards. Developing language skills that match the needs of growing markets, investing in educational programs, encouraging a wider segment of the local population to become involved in tourism, as well as promoting a sense of pride among those involved in tourism and in welcoming and handling tourists could be possible ways to improve the quality of the services.

It's necessary to invest in customer service training, technical, administrative, management and leadership skills development, and exchanging ideas and skills on best practice in customer service with other countries, which are recognized as leaders in these areas, to bring the quality of the touristic services to a state of the art, with the purpose of targeting markets with high quality demand and high spending power.

2. DISTRIBUTION (ACCESSIBILITY):

   I. INCREASE IN THE NUMBER OF AIR CONNECTIONS

Lisbon’s prospects for economic growth through tourism depend heavily on the accessibility of the region via all the different transport modes; air transport, in particular, is of vital importance in linking Lisbon to key international tourism markets. One of the main reasons why Lisbon took longer than many of Europe’s other urban destinations to become popular for city breaks is that it is located further away from key source markets. The average flight time from the main origin points is around three hours, as against only one to two hours for Europe’s city-break leaders.

Today the area still has a competitive disadvantage in terms of hours of flights and cost of tickets, being, in average, more expensive to reach through low-cost connections than the city-break competitors. A further problem is that the existing airport is reaching saturation and the planned new Lisbon International Airport will not be completed until 2017. Current projections point to a significant increase in passenger demand over the next few years, casting serious doubts over the existing
airport’s ability to cope with the growth in a sustainable way up to 2017; at current growth levels, demand will outstrip the airport’s maximum capacity by 2010-11. In addition to limiting growth in terms of the number of foreign tourists coming to Lisbon, and inhibiting the organization of new international events in Lisbon and the country as a whole, Portela Airport may be forced to turn away countless flights. As a result, both traditional/network airlines and low-cost carriers (LCCs) already operating to, or considering operating to, Lisbon could be discouraged from doing so because of the restrictions on adding new frequencies or securing specific slots.

The government should ensure that the existing Portela Airport operates to maximum efficiency for tourists coming to the Lisbon region and the rest of the country. It is necessary to promote the growth of low-cost air connections to the city, thus increasing concurrency and aiming to reduce the price of the ticket and to increase the number of daily connections, especially towards priority and development markets.

II. ROAD AND RAIL ACCESSIBILITY

Alongside air transport, road and rail transport are as critically important for Lisbon as a region, especially at the growth pace in number of tourists expected for the next years. High-speed rail connections are fundamental, and in this terms the high-speed rail link connection with Madrid (expected to be operating by 2011) should be a way to boost the tourism potential of the region, enabling an easier access for European tourists traveling by rail especially the Spanish strategic market. It should be also necessary to increase the rail connections between the city and the rest of the region, as many centers of touristic relevance, for example Sintra, are not easily accessible by train. It’s also necessary to improve the accessibility among the city center itself, for example enhancing the possibilities to access places like the Castélo zone from the Baixa with a limited effort (maybe with the use of elevators), and, above all, improve the road mobility in the city center; traffic is one of the major problems for the central touristic zones, and makes it almost impossible for foreigners to travel around the city (and in the surroundings) with private means of transport.

Lisbon, developing its transport assets, has the possibility of becoming a tourism and travel hub, both

51 Lisbon – The Impact of Travel and Tourism on Jobs and Economy, World Travel and Tourism Council, 2008
52 Ibid.
for its region, for Portugal as a whole, and for the Iberian peninsula, being in a strategic position between Europe, South America and Africa; in this optic, it’s necessary for the region to sustain current and future infrastructure projects, ensuring adequate growth in demand for them.

III. WATER ACCESSIBILITY

The Port of Lisbon is another point of entry used by international tourists visiting the Lisbon region, and is one of the leading, and largest, cruise ship ports in Europe. The number of cruise ships through the Port of Lisbon grew by 7 per cent in 2006, generating a 13 per cent rise in cruise passengers, to 270,893. Of these, 20,755 disembarked in Lisbon, 20,213 embarked, and 229,925 were in transit. The average annual growth in passenger numbers from 2000 to 2006 was 6 per cent. Access by sea is currently limited to three cruise ship terminals – in the Alcântara, Rocha de Conde de Óbidos and Santa Apolónia areas. To improve these means of access into Lisbon and also contribute towards the growth in cruise ship tourism, a new cruise ship terminal is being built in the Santa Apolónia area. It will be able to accommodate five cruise ships at the same time, and it should be operational by 2011. The new cruise terminal can act as a catalyst to developing tourism for Lisbon, opening up additional services for incoming visitors. In addition to building a new cruise ship terminal, Lisbon must try to ensure easy access to and from the terminal; it must pay particular attention to design, architecture and planning, as well as providing street-level access, so as to facilitate seamless connectivity and provide easy access for tourists to nearby attractions and facilities.

3. PROMOTION

I. PROMOTION THROUGH THE INTERNET

Internet is becoming more and more necessary for purposes of promotion. The possibilities are wide, in terms of developing awareness of the brand, creating buzz among the web community, enhancing the perception of the products and, eventually, giving the possibility of making 3D tours of the region. This media is becoming more and more important for those who look for lower prices and simplicity; especially for the city breaks target – constituted for a large part by young people with high academic level using the Internet on a daily basis - this is the first source to gather informations upon the city and the region, to compare and share opinions, read comments of previous travelers, create an itinerary,
and, possibly, book flights and accommodations. It is necessary to develop websites dedicated to the
touristic products of the region, differentiating them according to the different products and market
segments, all under the same *umbrella* brand “Lisbon region”. It’s also necessary to activate a
promotion directed to travel blogs and web reviews to enhance the perception of the brand and the
products, as well as improving awareness. It must be a priority to create a database of e-mail addresses,
names, nationalities and personal characteristics with distinctions upon different market segments,
collecting the data directly from the tourists in the region and creating groups on web communities;
this is necessary to develop a process for sending newsletters addressed in a correct way to each
corresponding target, which can also be a way to create loyalty to the brand.

II. Action targeted on strategic prescribers

Communication to strategic prescribers is necessary especially for those market segments that mainly
rely on organized packets offered by tour operators for their travels or make up an opinion upon
specialist reviews. This kind of promotion is necessary especially for the golf and business markets,
both growing markets made up by high spenders with a high importance for the region. From the
analysis of the demand it’s possible to infer that especially the golf market segment forms its opinions
through specialist reviews and travel operators; promotion is fundamental to grow in the golf segment,
as the city already has golf courses among the best (in terms of quality) in the world. It’s necessary to
develop a diversification in the positioning of the region adding to the *sun & fun* golf experience a
further positioning of the area as a *prestige* golf destination; the promotion must be directed towards
key markets, such as UK, Ireland, Scandinavia, and the major UE markets.

In the Mice/business segment, the promotion must be addressed mostly to specialist reviews and
directly to the organizers of the meetings, that is, big international companies in the target markets
(especially the major UE markets, mostly Spain). Regarding the cruise segment, other than travel
agencies is also important to address directly cruise companies, to improve the number of cruises
docking in the city; most of the market segments directly refer to cruise companies for the choice of the
destination.

Travel reviews, travel blogs, specialized journalists and film makers should be addressed with a targeted
promotion as their activity is a good way to increase awareness and to build a good image of the area among the markets. The participation in tourism expositions (just like BIT) and international events, with touristic stands representing the region, is possibly a good way to arouse attention around the brand, promoting the new value proposition directly to specialized operators of the sector. It should be also a priority to launch a campaign for the promotion of the Tagus river as a destination for nautical activities, as the river possesses resources that are nowadays underutilized and unknown in the market.

6. CONCLUSIONS

Tourism is for the Lisbon region a very important contribution to a sustainable economic growth in terms of creation of employment and contribution to the GDP. The region has a huge amount of natural, geographical and historical-cultural resources, that could possibly lead to a great development in the tourism sector and are nowadays, for a large amount, under-developed. Seasonality is a present problem for the tourism of the region which can possibly be overtaken through the development of market segments that can challenge this tendency (such as the golf, culture and thematic city breaks segments). The infrastructures currently available in the area for the exploitation of touristic products are sometimes inadequate, and the connections to the area are soon going to be insufficient to respond to the fast growth in the number of tourists that is expected in the next years. Critical for the touristic growth will be the improvement of the accessibility of the area, through the development of air, rail, road and sea connections. The strategic axes for the development of tourism in the area are the improvement of the main touristic products of the region, and the diversification of the products, with a possible development of under-represented markets. A fundamental tool seems to be international promotion (especially on the Internet), aimed to raise awareness and enhance the city's perception in the market, creating a recognizable brand for the region; renewal and regeneration of the region's assets that can promote a modern image to the market are other keys to the success, as well as the creation of international appealing events and the development and promotion of peculiar differentiating contents and iconic landmarks.