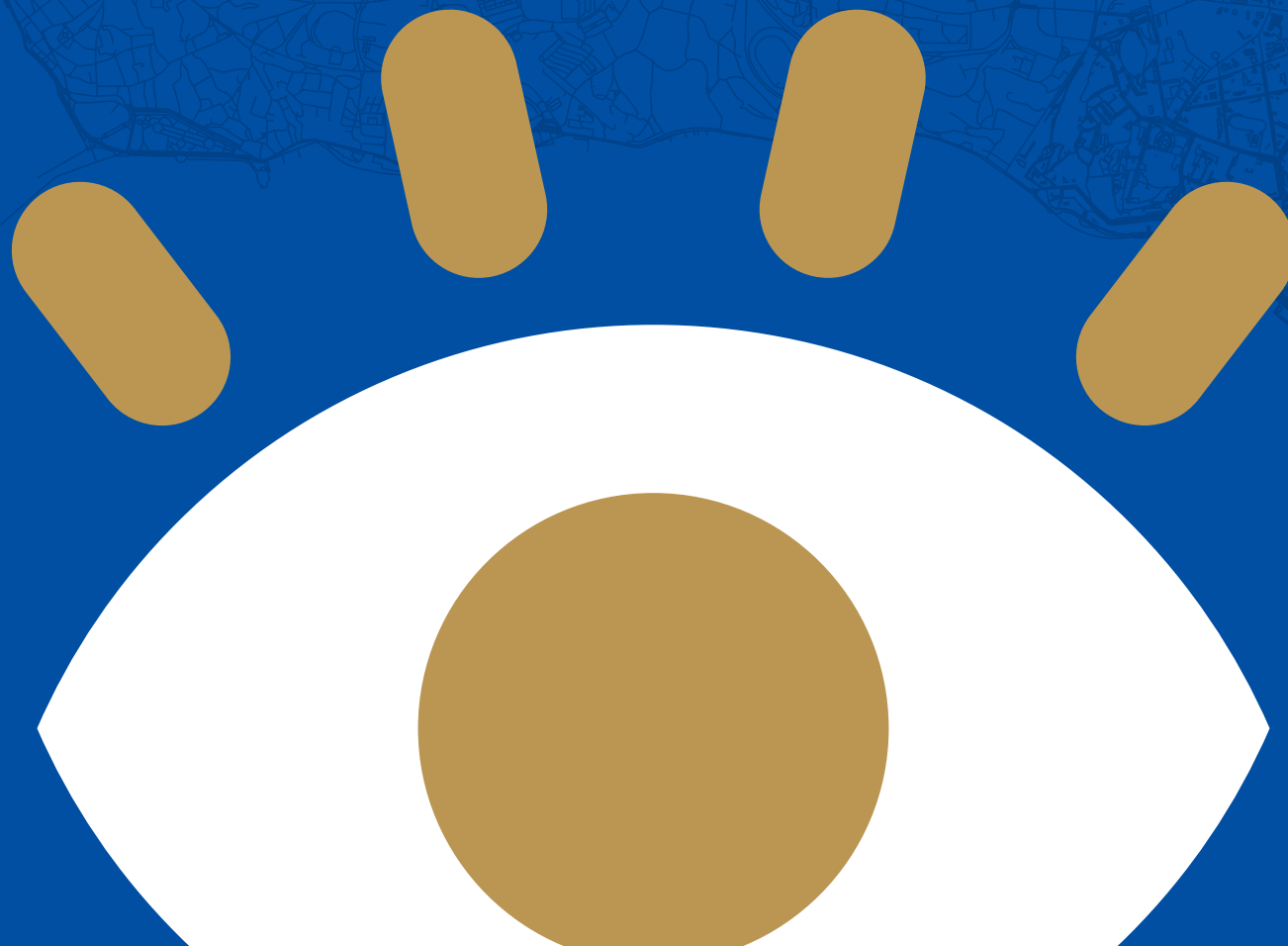


**Basic strategy for the
dispersion of Porto's
tourism flows and the
creation of quarters in the
Municipality of Porto**



Porto.

The strategy envisaged in this report divides the city of Porto into quarters, or blocks, to help spread tourism supply and demand



Since the creation of the Tourism and Internationalisation Department, Porto City Council has invested heavily in a strategy for Porto's sustainability as a destination, both in terms of the environment and the impact of tourism on the quality of life of those who live in the city.

Opting for sustainable tourism and a better quality of life for Porto's residents means that we need to rethink the city as a tourist destination and work towards a more specialised tourism, capable of harnessing the potential of the whole city, and not just the historic centre and Baixa district (downtown Porto). Thus, building on the excellence of the city as a whole, the aim is for Porto to become a leading international destination, asserting itself as a benchmark European city.

Important steps have already been taken in this direction, such as the drafting of the "Tourist Manifesto" and the creation of a new information platform that serves as the Porto Tourism Observatory. The "Yours Truly, Porto" channel is another example of the commitment to include all stakeholders in the process of rethinking tourism in the city. We propose this new strategy, aimed at structuring the area of Porto and its links to Matosinhos and Vila Nova de Gaia into "quarters" that reflect new ways of experiencing cities, to create a balanced and healthy co-existence

between those who visit Porto and its residents, and better manage the influx of tourists to the city centre.

The "Basic strategy for the dispersion of Porto's tourism flows and the creation of quarters in the Municipality of Porto" is, therefore, a project of strategic importance for the City Council's urban policy and one of the cornerstones of the "Future Vision for the Sustainability of Destination Porto".

This new approach to the city of Porto will enable customised promotion and investment attraction strategies for each area of the city based on their individual identities, competitiveness and attractiveness factors, and tourism offer, responding to the needs, potential and idiosyncrasies of each of the "micro-destinations" within the greater "Porto destination".

Catarina Santos Cunha
City Councillor for Tourism and
Internationalisation – Independent



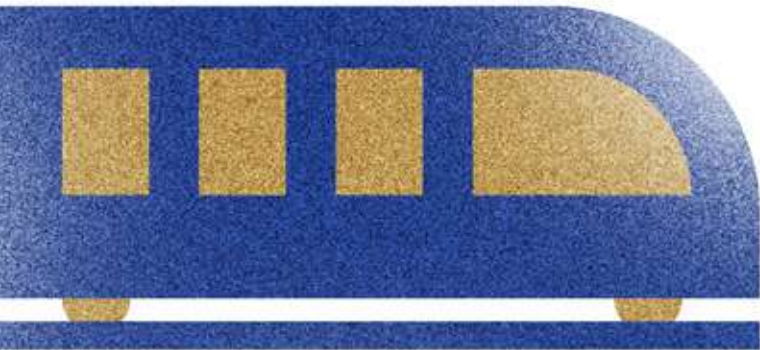
The creation of a holistic vision of the city in this proposal was only possible thanks to the valuable contributions of all those involved in the public participation process



The affirmation of Porto as a sustainable tourist destination is one of the assumptions underlying the implementation of the basic strategy for the dispersion of Porto's tourism flows and the creation of quarters in the Municipality of Porto, particularly because of the fundamental role the strategy will play in mitigating the negative consequences of the phenomenon of overtourism emerging in some areas of the city, such as the historic centre and downtown district, which affect the experience of tourists and visitors, as well as the quality of life of the municipality's residents. The City Council believes that this document is an instrument of city policy that refocuses tourism as the driving force behind sustainable development in the municipality.

Aimed at promoting the well-being of local communities and that of visitors to the city, we made sure to involve a broad cross-section of the public in the study. This allowed the technical team to pick up on internal sensitivities and collect contributions from individuals who specialised in the topics covered and the area of focus and, consequently, to adapt and expand the portrait of the local strategic context at territorial and sectoral level, with a particular focus on the tourism sector. We would therefore

like to express our deepest gratitude to all those who have contributed to the development of this strategy. The City Council would like to thank (i) the Presidents of the Parish Councils of the Municipality of Porto, who readily collaborated in the process, offering valuable insights into the particularities of their respective parishes, (ii) the Councillors responsible for Tourism in the Municipality of Porto and the neighbouring coastal cities (Matosinhos and Vila Nova de Gaia), (iii) our technical team and other teams involved in preparing the work carried out, (iv) the external individuals chosen to assist in the joint strategic reflection, selected based on their relevance to the territory and their knowledge of tourism practices, and (v) the young people of the municipality who took part in the listening process, as active voices in the city's tourist scene. Without the participation of all those listed above, it would have been impossible to achieve such an in-depth approach that takes into account the opinions of those who visit Porto and those who live and work in the municipality.



The proposed strategy promotes reflection on the city's development potential in terms of the balance between visitation, experience, enjoyment and residence

Tourist activities have driven prosperity on the planet and in Europe in particular. Nevertheless, the growing tourist attractiveness of some areas and their respective flows have culminated in overtourism, seriously affecting the tourist and visitor experience, the state of conservation of their cultural and natural heritage, and also (more importantly) the quality of life of residents, as already seen in several European cities and those of other continents. Faced with this reality, which threatens their territorial sustainability, some cities have been making an effort to address their specific challenges, including strategies to disperse flows geographically and to reduce seasonality, and even regulatory measures (e.g. limiting the supply of tourist accommodation and restricting certain activities). This "Basic strategy for the dispersion of Porto's tourism flows and the creation of quarters in the Municipality of Porto" reflects the Porto City Council's preventive approach in the face of signs of overtourism in the historic centre and downtown Porto. It is a continuation of the "Future Vision for the Sustainability of Destination Porto", an initiative presented and adopted in September 2022 by the Tourism and Internationalisation Department of the Municipality of Porto.

This strategy for the dispersal of Porto's tourism flows and the creation of quarters in the Municipality of Porto is a joint reflection on urban policy, the main added value of which lies in the identification and characterisation of quarters with different levels of maturity, helping to relieve the pressure on the areas of the city with high numbers of tourists and leverage emerging and consolidating areas (giving them visibility and attaching narratives to them and reasons to visit), thus improving enjoyment of the city by its residents and also its visitors.

Overtourism takes many forms, depending on the

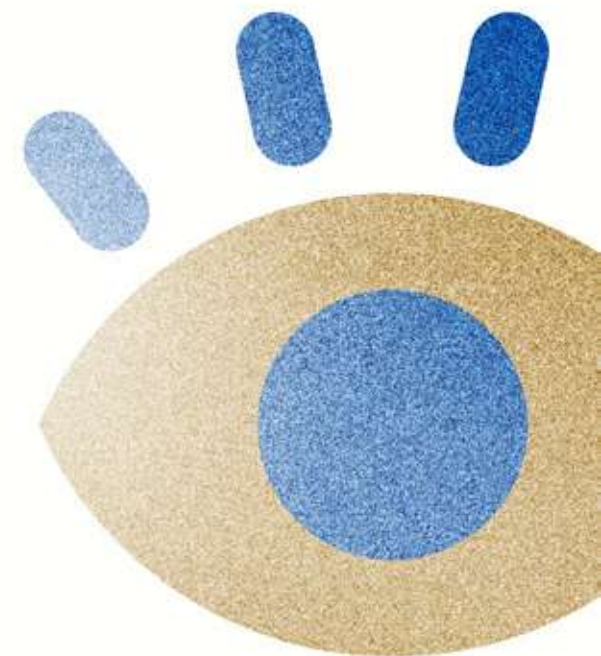
destination, as does the mitigation thereof. Accordingly, the methodology adopted and the findings presented seek to reconcile local knowledge, through statistical and documentary analysis and the use of consultation techniques, with international knowledge, through benchmarking cases that enable lessons learned from the experience of other cities to be incorporated in the path that Porto intends to follow.

It is important to stress the concern and relevance of listening to Porto's living forces in all stages of the process, who, as residents, workers and visitors, offer a portrayal beyond the available statistics, which are also presented in this report.

The quarters proposed are ever-evolving blocks, with one of the established assumptions being the flexibility to adjust their delimitation and identity to the emergence of new practices generated by the residents, activities and visitors.

The aim, therefore, is for this strategy, guided by the commitments made in the "Future Vision for the Sustainability of Destination Porto", to help the city move towards becoming a more sustainable area and destination, which balances the experience of residents with sightseeing and tourism activities, stimulated by an inspiring view of a renewed city.

Rather than being translated into the assumptions of this study, which were defined from a clearly operational approach, the proposed strategy offers support for reflection on the city's development potential in balancing the scale of visits, experience, enjoyment and residence, above all for dissemination both at home and abroad. More than just a study of the city today, this strategy calls for reflection on the future, in a compromise between its core heritage and the potential of the rest.





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1. ———

INTRODUCTION

The strategic definition for the future of tourism in the city of Porto implies a new approach to the critical challenges facing the "area" and the "visitation segment"

OBJECTIVES AND STRATEGIC BASIS

Approach to drawing up a strategy to create quarters in the city of Porto for tourism dispersal

Questions for strategic reflection

1

FROM WHERE?

What are the **main tourist areas** in Porto today?
Are they overcrowded?

2

TO WHERE?

Where are there assets for visitation and enjoyment outside the areas of greatest concentration?
What **types of visitation and enjoyment assets** or other attractiveness factors are present in these areas?

2

HOW?

How can we **leverage and consolidate** new areas of attraction and experience (city quarters)?
How can we **promote (market)** the new areas of attraction and experience (quarters) identified?

Goals

1

Assess the current tourism flows and the concentration thereof in the city, identifying areas with signs of overcrowding in certain parts of the city and at certain times of the year

2

Establish the strategic assumptions for the territorial identification of current and potential quarters to encourage the dispersion of tourism flows from the most overcrowded areas

3

Strategically identify the area of each quarter to be created and define the identities and narratives for the "new" areas of interest and to disperse visitors from the most crowded spots

4

Prepare an action plan that embodies the new identities and narratives of the identified quarters and the operational recommendations for the future activation and promotion thereof

Expected outcomes



Improved infrastructure and sustainability conditions for residents and visitors



Improved visitor experience by mitigating the effect of overtourism



Strengthened brand image of Porto as a sustainable tourist destination



Consolidation of levels of tourist inflow, consumption, length of stay and intake capacity



Higher hotel occupancy and resulting revenue from tourist tax and revenue for the players



Increased budget efficiency in territorial and tourism marketing efforts



Increased overall economic impact in terms of employment, expenditure and tax revenue



2. _____

TOURISM IN PORTO

The assessment of Porto's tourist activity provides a basis for considering the structuring of the city into quarters with a view to dispersing tourism flows

SUMMARY OF THE FORWARD-THINKING ASSESSMENT Main findings

Destination "Porto" is increasingly attractive to visitors

Destination "Porto" continued its long-standing trend of increasing attractiveness, having recovered its visitation to a higher number than the national post-pandemic average. In addition to the undeniable attractiveness of the historic centre and downtown Porto, other areas are beginning to show their own impetus, with the Bonfim, Campanhã and Miragaia areas being of particular note (areas with strong growth in foreign consumption in tourist activities). Areas of the city with less tourism potential, particularly in the more residential parishes such as Ramalde and Paranhos, will require greater activation efforts for the enjoyment of residents and visitors.

Destination "Porto" boasts history, culture and city life

History, tradition, wine and gastronomy are central elements of the attractiveness of destination "Porto", with the predominance of heritage and culture tourism assets (47% of total assets). These include museums, themed centres, statues, sculptures, fountains and monuments. Outside the historic centre and downtown district there are a significant number of points of attraction in the JP of Lordelo do Ouro and Massarelos (including the Boavista and Campo Alegre areas) and in the JP of Aldoar, Foz do Douro and Nevogilde (including Foz Velha and along the coast). Along the coast from the São João da Foz Castle to Praia do Molhe beach, the density of assets supporting visitation (accommodation and restaurants) is also noteworthy.

Destination "Porto" is beginning to show signs of overtourism

The assessment suggests signs of overtourism in the historic centre and downtown Porto, particularly during high season. 71% of the tourism offer is concentrated in areas, measured by the number of tourist establishments, and 79% of tourism demand, measured by the volume of ATM transactions made by foreigners in Porto (2022). Tourism trends in these areas show a tendency towards overtourism that impacts the quality of life of residents and affects visitor experience, although still at manageable levels (JPs with a lower growth rate in the number of local accommodation establishments and, in some areas, lower growth in foreign consumption, such as Santo Ildefonso and São Nicolau).

Destination "Porto" should focus on the balance between visitation and experience

Analysis of the assessment of destination "Porto" identified trends of growing attractiveness in different areas of the city, but sustainability of the destination depends on striking a balance between the existing residential and living conditions and the tourism practices of the city. The assessment provides a basis for discussion (clues) for structuring the city into quarters. This analysis, presented below, is primarily an effort to raise awareness, as opposed to focusing on numbers, given the limitation of existing statistical information at intramunicipal level – a gap that needs to be addressed for the future management of tourism flows and the monitoring of tourism pressure.

Bearing in mind the tourist hotspots, the strategic challenge is to structure the city into quarters and increase the visibility of the potential for enjoyment in lesser-known areas

OVERALL STRATEGIC CHALLENGE

Strategic analysis of tourism flows based on the assessment

AREA OF HIGH TOURIST CONCENTRATION
Challenge: direct visitors to other parts of the city and other areas

MAIN FOCUS AREAS FOR CONSOLIDATING ATTRACTIVENESS FOR VISITORS
Challenge: identify differentiating elements of the offer to create quarters with "identities" (and ideas for the respective "narratives")

HOTSPOTS/ANCHOR ASSET CORRIDORS
Challenge: link between anchor assets (as drivers of tourism momentum) and other visitor assets to embody and emphasise the attractiveness of the different areas of the city

SECOND CROWN OF CONCENTRATION OF ASSETS THAT SUPPORT VISITATION IN THE CITY OF PORTO
(signs of the expansion of the offer to areas near the historic centre and Downtown Porto)
Challenge: project the arguments for visitation of this strip, ensuring a balance between visitation, experience, enjoyment and residence

RESIDENTIAL AREAS
Challenge: identify the potential for visitation (albeit emerging) to activate and emphasise potential city quarters for the enjoyment of residents and visitors

Overall strategic challenge → Structure the city into quarters and increase the visibility of the potential for enjoyment of lesser-known areas of the city (from the most mature to the most emerging), associating them with narratives and reasons for visiting, so as to relieve the pressure on areas of the city with (growing) tourism demand.



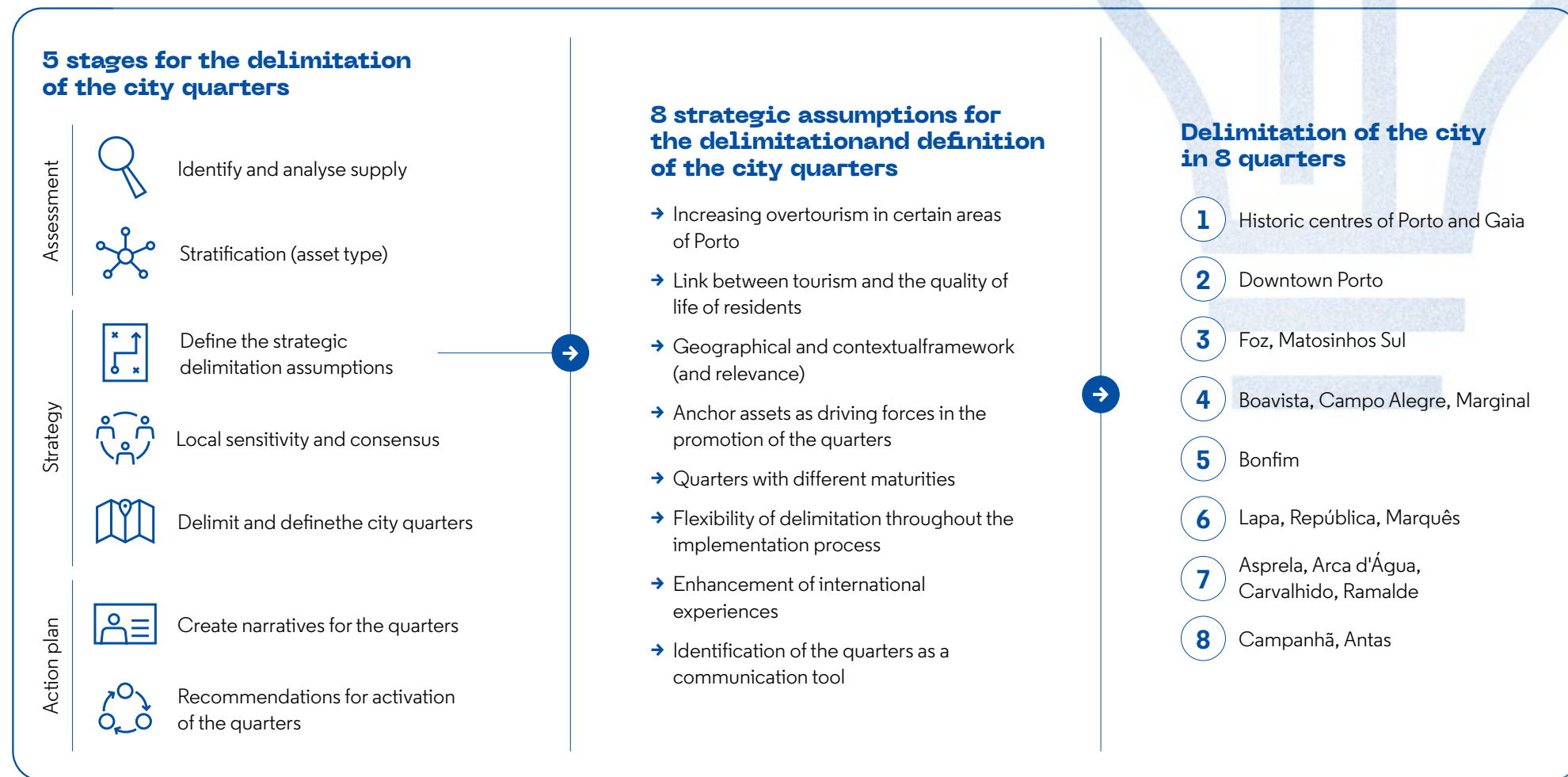
3.

PORTO
QUARTERS

A methodological approach with stages and assumptions was used to identify the quarters based on quantitative and qualitative analysis

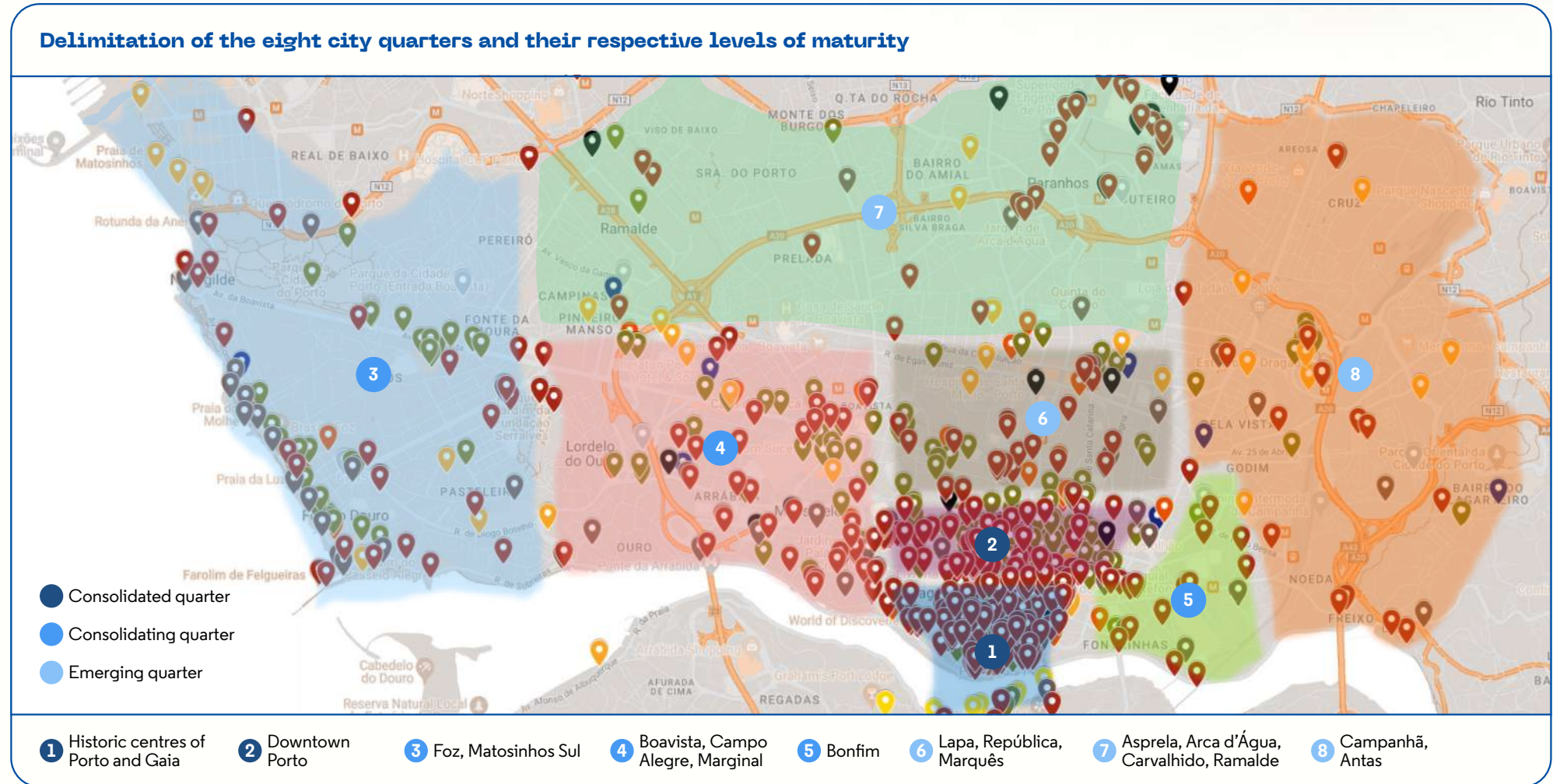
METHODOLOGY FOR DELIMITATION

The methodology used to identify and define the city quarters included five stages and eight strategic assumptions, as set out below. On the next pages, each of the elements represented are examined in more detail.



The eight proposed quarters cover the entire city of Porto and are interconnected with the municipalities of Matosinhos and Gaia

MAPPING OF THE CITY QUARTERS



Delimitation of the city quarters takes into account their themed environments around which the narratives will be created and the quarters activated

THEME-BASED DELIMITATION OF THE CITY QUARTERS (1/2)

Quarter	Theme	Points of interest
Historic centres of Porto and Gaia CONSOLIDATED	The Porto from history, the past and the preservation of its unique character, considered a UNESCO World Heritage Site.	<ul style="list-style-type: none"> → Clérigos Tower → Sé Cathedral → Stock Exchange Palace → Ribeira
Downtown Porto CONSOLIDATED	Porto has a solid and marked identity, with iconic avenues and spaces that combine a diverse gastronomic offer with a youthful atmosphere of fun and nightlife.	<ul style="list-style-type: none"> → Carmo Church → Cordoaria Gardens → Bombarda Art District → Rua de Cedofeita
Foz, Matosinhos Sul CONSOLIDATING	The Porto that joins the river to the ocean, combining the natural beauty and geology of its coastline with a distinctive range of restaurants and shops.	<ul style="list-style-type: none"> → City Park → "Cheese" Castle → Serralves Foundation → Porto and Matosinhos beaches
Boavista, Campo Alegre, Marginal do Douro CONSOLIDATING	The Porto of architecture, music and art, which houses international companies in a heritage site of high architectural value and which has a traditional hotel offer of recognised quality.	<ul style="list-style-type: none"> → Casa da Música Concert Hall → Botanical Gardens → School of Architecture → Electric Car Museum → Massarelos Church

Source: EY-Parthenon.

Delimitation of the city quarters takes into account their themed environments around which the narratives will be created and the quarters activated

THEME-BASED DELIMITATION OF THE CITY QUARTERS (2/2)

Quarter	Theme	Points of interest
Bonfim CONSOLIDATING	The irreverent and young Porto, which attracts creative and disruptive minds and provides its visitors with an artistic offer that is unique in the city.	<ul style="list-style-type: none"> → Bonfim Church → Prado do Repouso Cemetery → School of Fine Art → São Lázaro Gardens <ul style="list-style-type: none"> → Municipal Library → Parque das Águas Park → Military Museum
Lapa, República, Marquês EMERGING	The Porto that welcomed the liberal lines of defence, that is faithful and loyal to its values and principles and that combines historical and religious monuments in a vibrant cultural symbiosis.	<ul style="list-style-type: none"> → Lapa Church → Praça do Marquês Square → Praça da República Square → Fernando de Castro House Museum <ul style="list-style-type: none"> → Porto ArtSquare → Church and Tower of Nossa Senhora da Conceição → Lapa Cemetery
Asprela, Arca d'Água, Carvalhido, Ramalde EMERGING	The Porto of research, science and knowledge, combining the city's traditions and local soul with the most valuable developments in the scientific ecosystem.	<ul style="list-style-type: none"> → Carvalhido Church → Quinta da Prelada Park → Quinta do Covelo Park <ul style="list-style-type: none"> → Arca d'Água Gardens → Asprela Park → Pharmacy Museum
Campanhã, Antas EMERGING	The Porto where rural and urban environments intertwine, with new dynamics and in constant renewal, setting the stage for unique and distinctive spaces in the city.	<ul style="list-style-type: none"> → Dragão Football Stadium → São Roque Park → Parque Oriental Urban Park → Quinta da Bonjóia Estate <ul style="list-style-type: none"> → Intermodal Terminal → Old Slaughterhouse → Freixo Palace and Marina

Source: EY-Parthenon.



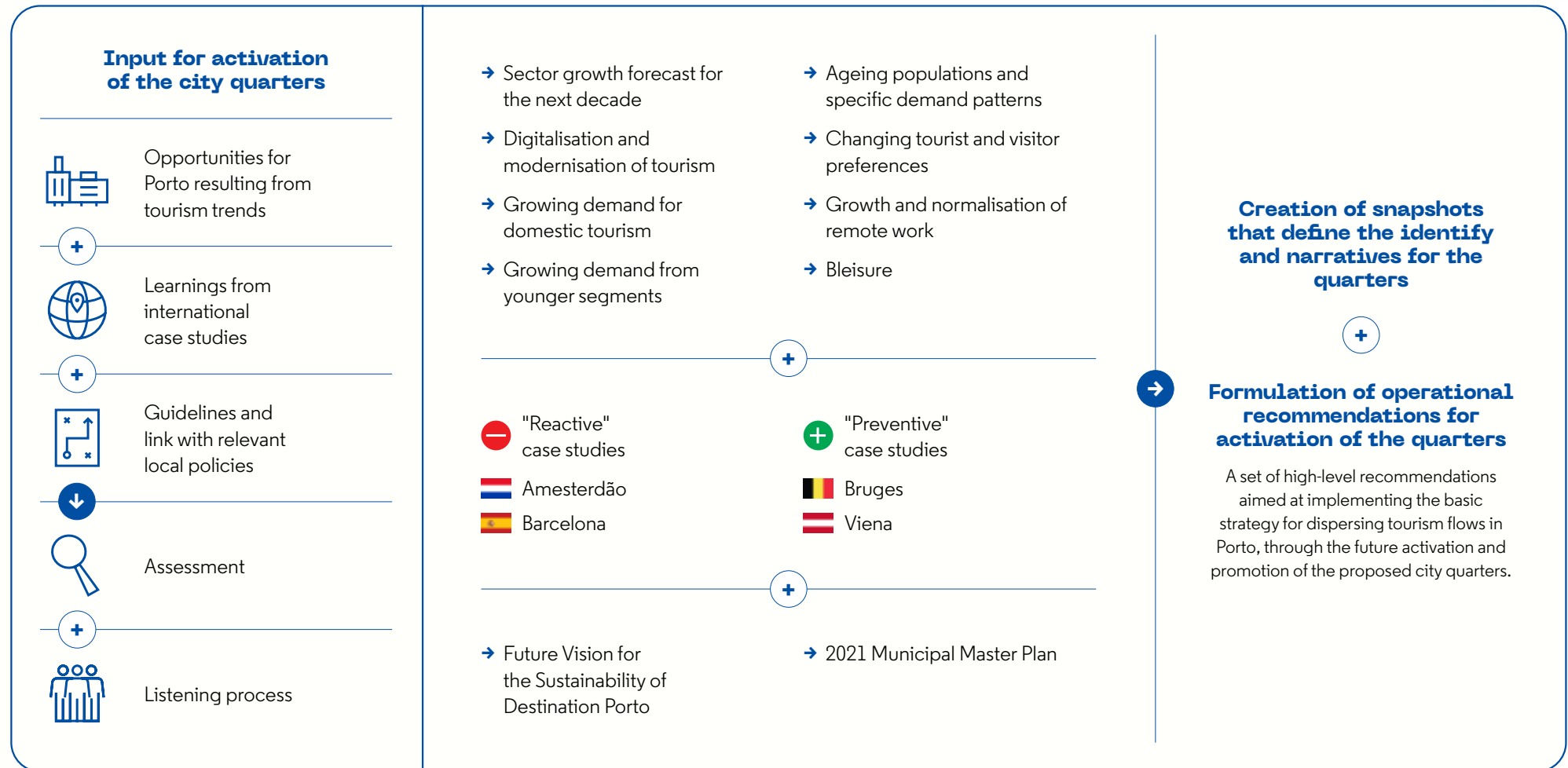
4.

ACTIVATION OF THE NEW QUARTERS

Activation of the city quarters is the result of a series of input that includes analysing tourism trends, case studies and relevant local policies

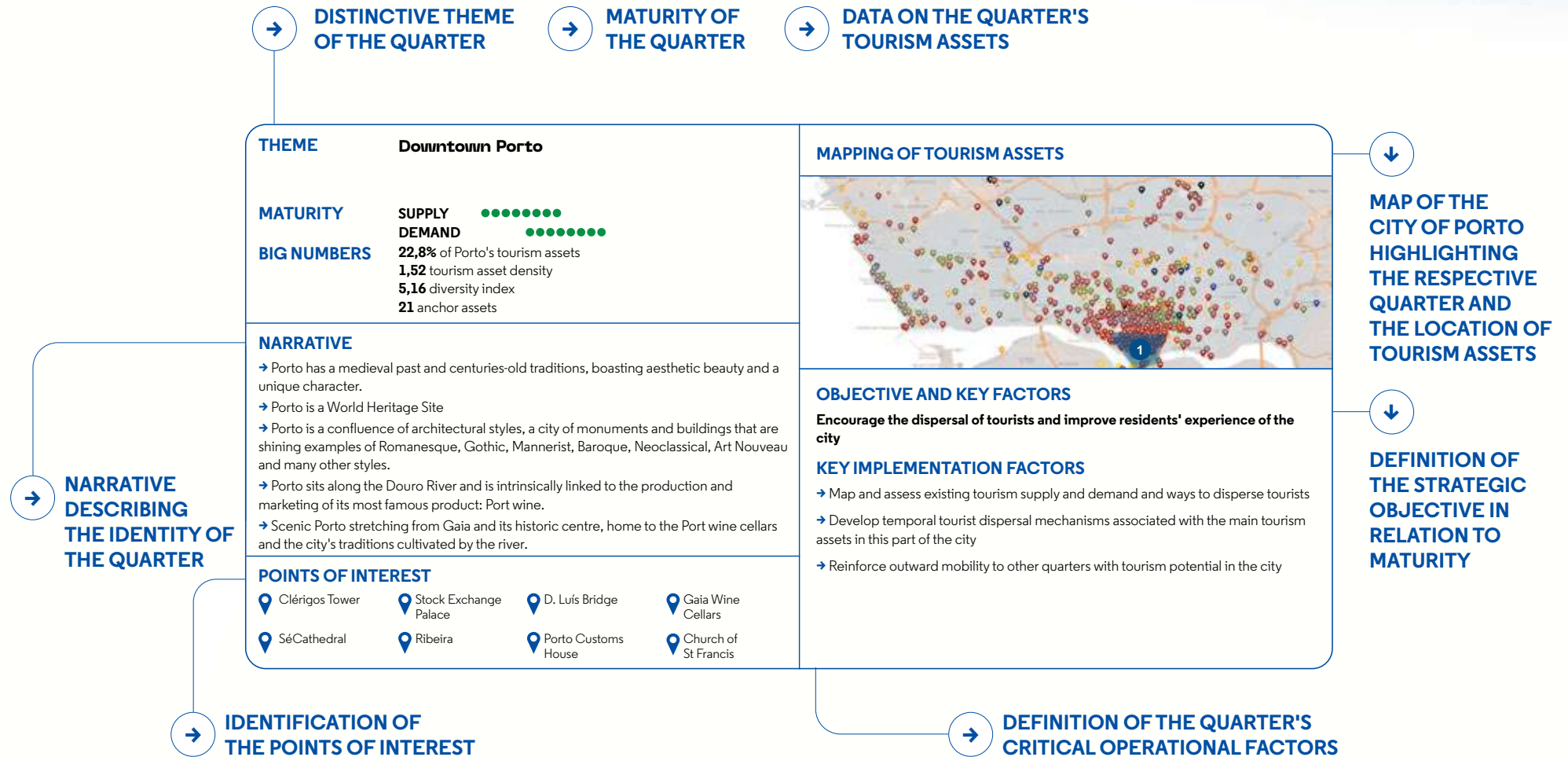
METHODOLOGY FOR ACTIVATION

The methodology used to create the narratives for each quarter and formulate recommendations for activating them was based on input gathered through the analysis of different elements, as set out below. On the next pages, each of the elements represented are examined in more detail.



The information on each quarter has been summarised in the form of a snapshot containing the theme, narrative, points of interest and the strategic basis for implementation

SNAPSHOT OF THE CITY QUARTERS



The historic centres of Porto and Gaia are a must-see for tourists and a prime example of the city's connection to its winegrowing and riverside traditions

THEME AND NARRATIVE OF THE CITY QUARTERS: HISTORIC CENTRES OF PORTO AND GAIA

<p>THEME Historic centres of Porto and Gaia</p> <p>MATURITY</p> <p>BIG NUMBERS</p> <p>SUPPLY ●●●●●●●●</p> <p>DEMAND ●●●●●●●●</p> <p>24,8% of Porto's tourism assets</p> <p>1,52 tourism asset density</p> <p>5,16 diversity index</p> <p>21 anchor assets</p>	<p>MAPPING OF TOURISM ASSETS</p> 
<p>NARRATIVE</p> <ul style="list-style-type: none"> → Porto has a medieval past and centuries-old traditions, boasting aesthetic beauty and a unique character. → Porto is a World Heritage Site. → Porto is a confluence of architectural styles, a city of monuments and buildings that are shining examples of Romanesque, Gothic, Mannerist, Baroque, Neoclassical, Art Nouveau and many other styles. → Porto sits along the Douro River and is intrinsically linked to the production and marketing of its most famous product: Port wine. → Scenic Porto stretching from Gaia and its historic centre, home to the Port wine cellars and the city's traditions cultivated by the river. 	<p>OBJECTIVE AND KEY FACTORS</p> <p>Encourage the dispersal of tourists and improve residents' experience of the city</p> <p>KEY IMPLEMENTATION FACTORS</p> <ul style="list-style-type: none"> → Map and assess existing tourism supply and demand and ways to disperse tourists → Develop temporal tourist dispersal mechanisms associated with the main tourism assets in this part of the city → Reinforce outward mobility to other quarters with tourism potential in the city
<p>POINTS OF INTEREST*</p> <ul style="list-style-type: none"> 📍 Clérigos Tower 📍 Stock Exchange Palace 📍 D. Luís Bridge 📍 Gaia Wine Cellars 📍 Sé Cathedral 📍 Ribeira 📍 Alfândega do Porto 📍 Church of St Francis 	

* Not an exhaustive list.
Source: EY-Parthenon, Porto City Council.

A Baixa do Porto é um marco identitário da cidade, onde convivem muitos pontos de elevado interesse turístico com uma oferta diversa de restauração e comércio


THEME AND NARRATIVE OF THE CITY QUARTERS: DOWNTOWN PORTO

<p>THEME Downtown Porto</p> <p>MATURITY</p> <p>BIG NUMBERS</p> <p>SUPPLY ●●●●●●●●</p> <p>DEMAND ●●●●●●●●</p> <p>25,8% of Porto's tourism assets</p> <p>1,30 tourism asset density</p> <p>4,86 diversity index</p> <p>11 anchor assets</p>	<p>MAPPING OF TOURISM ASSETS</p> 
<p>NARRATIVE</p> <ul style="list-style-type: none"> → The Porto that spills out from its historic centre, blending traditional with modern. → The Porto of Avenida dos Aliados and Bolhão Market, of iconic avenues and spaces. → The Porto that combines its historical value with the banking, commercial and service buildings that shape the city's identity and character. → The Porto of traditional restaurants and modern gastronomy, of narrow streets with secrets to be discovered on every corner. → The Porto with a bustling nightlife, the "Galeries de Paris" and the "Piolho" area, where young and old meet and socialise. 	<p>OBJECTIVE AND KEY FACTORS</p> <p>Encourage the dispersal of tourists and improve residents' experience of the city</p> <p>KEY IMPLEMENTATION FACTORS</p> <ul style="list-style-type: none"> → Map and assess existing tourism supply and demand and ways to disperse tourists → Develop temporal tourist dispersal mechanisms associated with the main tourism assets in this part of the city → Reinforce outward mobility to other quarters with tourism potential in the city
<p>POINTS OF INTEREST*</p> <ul style="list-style-type: none"> 📍 Carmo Church 📍 Bombarda Art District 📍 Avenida dos Aliados 📍 Bolhão Market 📍 Cordoaria Gardens 📍 Rua de Cedofeita 📍 Rua de Santa Catarina 📍 Porto Coliseum 	

* Not an exhaustive list.
Source: EY-Parthenon, Porto City Council.

Foz Velha, Matosinhos and the coastline are the link between the Atlantic and the Douro River, and are home to iconic tourist attractions in the city of Porto and Matosinhos

THEME AND NARRATIVE OF THE CITY QUARTERS: FOZ – MATOSINHOS SUL

<p>THEME Foz – Matosinhos Sul</p> <p>MATURITY SUPPLY ●●●●●●●●</p> <p> DEMAND ●●●●●●●●</p> <p>BIG NUMBERS 13,6% of Porto's tourism assets</p> <p> 0,10 tourism asset density</p> <p> 6,91 diversity index</p> <p> 8 anchor assets</p>	<p>MAPPING OF TOURISM ASSETS</p> 								
<p>NARRATIVE</p> <ul style="list-style-type: none"> → The (Atlantic) Porto that joins the river to the ocean, combining the natural beauty and geology of its coastline with a distinctive range of restaurants and shops and strong intangible traditions. → The Porto of the haphazard streets of Foz Velha, connected to the city's living laboratory of culture and art: the Serralves Museum. → The Porto of Castles, from the S. João da Foz Castle to the Fort of São Francisco Xavier. → The Porto that connects to Matosinhos and embraces its fishing tradition and propensity for good food. → The Porto of Passeio Alegre and Avenida Montevidéu, of inlaid beaches along the city's unique coastline and green spaces. 	<p>OBJECTIVE AND KEY FACTORS</p> <p>Sustain and boost attractiveness for visitors and improve quality of life for residents</p> <p>KEY IMPLEMENTATION FACTORS</p> <ul style="list-style-type: none"> → Ensure institutional coordination between the Porto and Matosinhos City Councils for joint tourism promotion → Develop travel itineraries that capitalise on the new mobility options emerging in this part of the city (e.g. Metrobus) → Capitalise on the strategic assets of the Serralves Museum and the City Park as distinctive elements of tourist attraction 								
<p>POINTS OF INTEREST*</p> <table border="0"> <tr> <td>📍 City Park</td> <td>📍 Serralves Foundation</td> <td>📍 Foz Velha and Cantareira</td> <td>📍 Pasteleira Park</td> </tr> <tr> <td>📍 "Cheese" Castle</td> <td>📍 Porto and Matosinhos beaches</td> <td>📍 Reservoir</td> <td>📍 Foz waterfront</td> </tr> </table>	📍 City Park	📍 Serralves Foundation	📍 Foz Velha and Cantareira	📍 Pasteleira Park	📍 "Cheese" Castle	📍 Porto and Matosinhos beaches	📍 Reservoir	📍 Foz waterfront	
📍 City Park	📍 Serralves Foundation	📍 Foz Velha and Cantareira	📍 Pasteleira Park						
📍 "Cheese" Castle	📍 Porto and Matosinhos beaches	📍 Reservoir	📍 Foz waterfront						

* Not an exhaustive list.
Source: EY-Parthenon, Porto City Council.

Boavista, Campo Alegre and Marginal is a multi-themed quarter, with nature, art and museology tourism assets

THEME AND NARRATIVE OF THE CITY QUARTERS: BOAVISTA – CAMPO ALEGRE – MARGINAL DO DOURO

<p>THEME Boavista – Campo Alegre – Marginal do Douro</p> <p>MATURITY</p> <p>BIG NUMBERS</p> <p>SUPPLY ●●●●●●●●●●</p> <p>DEMAND ●●●●●●●●●●</p> <p>13,0% of Porto's tourism assets</p> <p>0,23 tourism asset density</p> <p>4,49 diversity index</p> <p>4 anchor assets</p>	<p>MAPPING OF TOURISM ASSETS</p> 
<p>NARRATIVE</p> <ul style="list-style-type: none"> → The Porto that combines the works of renowned architects with iconic city spaces such as the Crystal Palace and Casa da Música concert hall. → The Porto of music and art, which houses international companies in a heritage site of high architectural value and which has a traditional hotel offer of recognised quality. → The Porto of Campo Alegre, part of a scientific contemplative and contemplative ecosystem, in perfect symbiosis between both elements. → The Porto along the waterfront, stretching from the Customs House and telling the story of mobility in the city through the Electric Car Museum 	<p>OBJECTIVE AND KEY FACTORS</p> <p>Sustain and boost tourist attractiveness and improve quality of life for residents</p> <p>KEY IMPLEMENTATION FACTORS</p> <ul style="list-style-type: none"> → Activate existing tourist routes (e.g. Caminhos do Romântico [Romantic Trails]) and develop new travel itineraries → Link the tourism offer with the Foz Velha, Serralves and the coastline to provide a richer tourist experience → Capitalise on the geographical proximity to the consolidated quarters of downtown Porto and the historic centre and the historic centre of Gaia
<p>POINTS OF INTEREST*</p> <ul style="list-style-type: none"> 📍 Casa da Música Concert Hall 📍 School of Architecture 📍 Massarelos Church 📍 Campo Alegre 📍 Botanical Gardens 📍 Electric Car Museum 📍 Crystal Palace 📍 Synagogue and Holocaust Museum 	

* Not an exhaustive list.
Source: EY-Parthenon, Porto City Council.

The Bonfim quarter is a lively area where youth, art and entrepreneurship find a place to flourish and establish themselves in the city of Porto

THEME AND NARRATIVE OF THE CITY QUARTERS: BONFIM

<p>THEME Bonfim</p> <p>MATURITY</p> <p>BIG NUMBERS</p> <p>SUPPLY ●●●●●●●●</p> <p>DEMAND ●●●●●●●●</p> <p>4,5% of Porto's tourism assets 0,21 tourism asset density 1,86 diversity index 0 anchor assets</p>	<p>MAPPING OF TOURISM ASSETS</p> 
<p>NARRATIVE</p> <ul style="list-style-type: none"> → The budding and irreverent Porto, which attracts creative and disruptive young people and provides its visitors with an artistic offer that is unique in the city. → The young Porto of the fine arts, that admires the city from the Fontainhas viewpoint, appreciates the beauty of the Prado do Repouso Cemetery and visits the art exhibitions that grace the walls of the Bonfim galleries. → Literary Porto, experienced and frequented by the strong personalities of Portuguese and international authors who seek inspiration in the city's nooks and crannies. → Contemporary Porto, which does not ignore tradition but rather encourages it to be incorporated into a fresh and unique experience. 	<p>OBJECTIVE AND KEY FACTORS</p> <p>Sustain and boost tourist attractiveness and improve quality of life for residents</p> <p>KEY IMPLEMENTATION FACTORS</p> <ul style="list-style-type: none"> → Boost the growing artistic ecosystem as a differentiating tourism element → Promote Bonfim as a prime location for activities for young people and young adults → Capitalise on the geographical proximity to the consolidated quarters of downtown Porto and the historic centre and the historic centre of Gaia
<p>POINTS OF INTEREST*</p> <ul style="list-style-type: none"> 📍 Bonfim Church 📍 School of Fine Art 📍 Municipal Library 📍 Military Museum 📍 Prado do Repouso Cemetery 📍 São Lázaro Gardens 📍 Parque das Águas Park 	

* Not an exhaustive list.
Source: EY-Parthenon, Porto City Council.

Liberal Porto, a place that helps tell the history of the city, that recalls the side of liberalism and support for the republican cause, of which the residents are proud

THEME AND NARRATIVE OF THE CITY QUARTERS: LAPA – REPÚBLICA – MARQUÊS

<p>THEME Lapa – República – Marquês</p> <p>MATURITY SUPPLY ●●●●●●●●●●</p> <p> DEMAND ●●●●●●●●●●</p> <p>BIG NUMBERS 6,4% of Porto's tourism assets</p> <p> 0,18 tourism asset density</p> <p> 2,06 diversity index</p> <p> 0 anchor assets</p>	<p>MAPPING OF TOURISM ASSETS</p> 
<p>NARRATIVE</p> <p>→ The Porto at the intersection between a markedly historic (Praça da República) and religious (Lapa Church and Cemetery) offer for visitors and the impetus of a new hotel and artistic offer.</p> <p>→ The Porto of liberalism, to which King Pedro IV gave his heart as a tribute to the people's bravery and resilience in the liberal cause.</p> <p>→ Republican Porto, where Praça da República was the scene of the 31 January 1891 Revolt, which led to the downfall of Costa Cabral.</p> <p>→ The Porto that welcomed the liberal forces in Praça do Marquês de Pombal, which is faithful and loyal to its values and principles.</p>	<p>OBJECTIVE AND KEY FACTORS</p> <p>Sustain and boost attractiveness for visitors and improve quality of life for residents</p> <p>KEY IMPLEMENTATION FACTORS</p> <p>→ Promote a historical perusal of this part of the city and the uniqueness of its offer for visitors and enjoyment</p> <p>→ Coordinate the development of Porto Art Square with the art tourism offer in the Bonfim and Boavista, Campo Alegre and Marginal quarters</p> <p>→ Capitalise on its geographical proximity to the consolidated downtown Porto quarter</p>
<p>POINTS OF INTEREST*</p> <p>📍 Lapa Church 📍 Praça da República Square 📍 Porto Art Square 📍 Lapa Cemetery</p> <p>📍 Praça do Marquês Square 📍 Fernando de Castro House Museum 📍 Church and Tower of Nossa Sra. da Conceição</p>	

* Not an exhaustive list.
Source: EY-Parthenon, Porto City Council.

The Porto of knowledge is an extensive quarter that embraces science and innovation, while preserving the traditional and local know-how of the city

THEME AND NARRATIVE OF THE CITY QUARTERS: ASPRELA – ARCA D'ÁGUA – CARVALHIDO – RAMALDE

<p>THEME Asprela – Arca d'Água – Carvalhido – Ramalde</p> <p>MATURITY</p> <p>BIG NUMBERS</p> <p>SUPPLY ●●●●●●●●●●</p> <p>DEMAND ●●●●●●●●●●</p> <p>7,0% of Porto's tourism assets</p> <p>00,6 tourism asset density</p> <p>3,22 diversity index</p> <p>0 anchor assets</p>	<p>MAPPING OF TOURISM ASSETS</p> 
<p>NARRATIVE</p> <ul style="list-style-type: none"> → The Porto of research, science and knowledge, combining the city's traditions with the most valuable developments in the scientific ecosystem. → The Porto that offers the ideal combination of residential and business tranquility (Carvalhido, Prelada and Ramalde) with a thriving ecosystem of research and scientific innovation (Asprela and Arca d'Água). → The Porto with a local soul, the picturesque lines of one of the city's most residential areas and a unique commercial offer, emphasising the city's history and traditions. 	<p>OBJECTIVE AND KEY FACTORS</p> <p>Structure the existing tourism offer and support the development of new tourism assets</p> <p>KEY IMPLEMENTATION FACTORS</p> <ul style="list-style-type: none"> → Promote a tourism offer and travel itineraries that include and boost the four neighbouring quarters → Promote and enable existing tourism assets in this part of the city by developing conditions that support visitation → Develop infrastructures to support short/medium-stay visitors and niche visitors (e.g. MICE**segment)
<p>POINTS OF INTEREST*</p> <ul style="list-style-type: none"> Carvalhido Church Quinta do Covelo Park Asprela Park Quinta da Prelada Park Arca d'Água Gardens Pharmacy Museum 	

* Not an exhaustive list. ** Meetings, Incentives, Conference and Exhibitions
Source: EY-Parthenon, Porto City Council.

The eastern part of the city is a dynamic area in constant renewal, seeking to maximise existing tourism assets and develop conditions for visitors

THEME AND NARRATIVE OF THE CITY QUARTERS: CAMPANHÃ – ANTAS

<p>THEME Campanhã – Antas</p> <p>MATURITY</p> <p>BIG NUMBERS</p> <p>SUPPLY ●●●●●●●●</p> <p>DEMAND ●●●●●●●●</p> <p>5,1% of Porto's tourism assets</p> <p>0,05 tourism asset density</p> <p>2,43 diversity index</p> <p>2 anchor assets</p>	<p>MAPPING OF TOURISM ASSETS</p> 
<p>NARRATIVE</p> <ul style="list-style-type: none"> → The Porto that merges the rural with the urban, the new and modern with the traditional, in a singular connection between two sides of the city with unique characteristics. → The Porto of green spaces, from the Parque Oriental urban park to the Quinta da Bonjóia estate and São Roque Park. → Blue and white Porto, shared by the sporting successes of Futebol Clube do Porto football club and the magnificence of the Dragão Stadium and Museum. → The Porto of new developments, in constant renewal, which will be the stage for unique and distinctive spaces in the city, such as the renovation of the old Municipal Slaughterhouse. 	<p>OBJECTIVE AND KEY FACTORS</p> <p>Structure the existing tourism offer and support the development of new tourism assets</p> <p>KEY IMPLEMENTATION FACTORS</p> <ul style="list-style-type: none"> → Mitigate mobility challenges in a wide geographic area such as the eastern quarter → Capitalise on structural investments (e.g. renovation of the old Municipal Slaughterhouse) in this part of the city → Renovate and revamp the city's public spaces to enhance them and offer better conditions for residents and visitors to enjoy
<p>POINTS OF INTEREST*</p> <ul style="list-style-type: none"> Dragão Football Stadium Parque Oriental Urban Park Intermodal Terminal Freixo Palace and Marina São Roque Park Quinta da Bonjóia Estate Old Slaughterhouse 	

* Not an exhaustive list.
Source: EY-Parthenon, Porto City Council.

The next steps for the future activation and development of the proposed quarters are guided by 12 operational recommendations, organised into four action areas

OPERATIONAL RECOMMENDATIONS

These operational recommendations complete the rationale for activating the quarters, with the new identities and narratives defined, as detailed in the previous subchapters, and the operational recommendations set out below. They are a set of high-level recommendations aimed at implementing the basic strategy for dispersing tourism flows in Porto through the future activation and promotion of the proposed city quarters. These recommendations were based on input gathered through trend analyses, benchmarking and local policies, as well as

the assessment and listening process. They seek to outline the steps to be taken to begin implementing this strategy and are divided into the four action areas depicted in the diagram below.

Although divided into action areas, the recommendations imply a coordinated and complementary approach. Improving the information, monitoring and follow-up system (action area A) involves maintaining the tools and setting up a working group tasked with monitoring the quarters (action area D), with a view to flexibility and

monitoring, to follow and respond to trends. Activation of the quarters (action area B) should be carried out in conjunction with local policies (action area C), ensuring that the development of the quarters is carried out in line with the city's overall policy and vision.

→ Operational recommendations

A. Improve the information, monitoring and follow-up system

- Collect quantitative information
- Produce qualitative information
- External monitoring group

B. Activate the quarters

- Operational measures
- Marketing and communication plan
- VisitPorto

C. Link with local policies

- Balance between visitors and residents
- Invite and guide private investment
- Improve accessibility

D. Increase visibility of the city quarters

- Study of target audiences
- Intra- and inter-quarter itineraries
- Monitor developments in the quarters

The structuring of the city into quarters will promote its sustainable development and improve attractiveness for those who visit and live in Porto

CONCLUSIONS

The "**Basic Strategy for the Dispersion of Porto's Tourism Flows and the Creation of Quarters in the Municipality of Porto**" is a policy guidance tool for Porto City Council. This strategy was designed based on a set of questions focused on understanding **from where, to where and how to promote the spatial dispersal of tourist and visitation flows** within the city of Porto, but also in specific areas linked to Vila Nova de Gaia and Matosinhos.

The study was conducted based on a **holistic view of the city**, ensuring that the approach went beyond the city as a tourist destination and a place to visit, looking at the city as a **place to live and work and for social interaction** for those who live in it. This premise, which recognises the importance of **improving infrastructure**, is particularly evident under recommendation C "Link with local policies", which suggests improvements that benefit both residents and tourists.

Structuring the city into quarters that are attractive to visitors aims to **slow and reverse the trend of over-tourism** in areas that are currently overcrowded, such as Porto's historic centre and downtown district, by dispersing tourism flows. Thus, with implementation of the recommended strategy, the **visitor experience is expected to improve** both in the currently overcrowded areas and in other city quarters, by consolidating their attractiveness. Moreover, the dispersion of visitors will see the **economic benefits of the tourism sector equally** distributed within the Municipality of

Porto. In this regard, of note are some of the recommendations that focus particularly on improving the tourist experience, such as improving accessibility, the study of target audiences, and intra- and inter-quarter itineraries.

Sustainability is the driving force behind the design of this strategy, highlighting throughout the report how the phenomenon of overtourism is taking us in the opposite direction and in fact threatening the sustainability (and resilience) of the tourism sector in the city. The drafting of this strategy therefore reflects the **City Council's commitment to sustainability**, which promotes the **strengthening of Porto's brand image as a sustainable tourist destination**.

The strategic work carried out to **activate the city's different quarters**, particularly in terms of consolidation and promotion/marketing, will lend **visibility to the attractiveness of lesser-known areas of the city** and contribute to a **broader tourism offer**, encouraging visitors to stay longer, while relieving the pressure on more overcrowded areas.

Consequently, and bearing in mind Porto's tourist segments, enhancing the offer will help **consolidate the levels of tourist inflow, consumption, length of stay and intake capacity**, while striking a better balance with the resident population.

By implementing this strategy, the **increased attractiveness** of the quarters is expected to **increase hotel**

occupancy and the **revenue** from tourist tax and the tourism sector in general, boosting the **competitiveness** of the sector and of the local economy.

Finally, the holistic strategy considers elements that promote increased budget efficiency in territorial and tourism **marketing efforts** with a **cohesive vision of the region**, balancing life in the city and visitation. Elements such as analysing and promoting anchor assets, which act as a showcase to attract a visitor's attention and encourage them to move away from overcrowded areas, and defining the identities of the quarters around the differentiating factor of the offer, without overlooking the diversity and complexity of the social and cultural realities of each quarter, will enhance the **effectiveness of communication and activation** of destination Porto.

DATASHEET

Title

Basic strategy for the dispersion of Porto's tourism flows and the creation of quarters in the Municipality of Porto
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Coordination

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Consultancy

EY-Parthenon

The logo for Porto, featuring the word "Porto." in a bold, white, sans-serif font, enclosed within a white rectangular border.