

Tourism Activity
November 2011

Tourism accommodation activity shows overall declining results

The number of overnight stays in tourism accommodation establishments decreased by 3.4% towards the same month of the previous year, accounting for 1.9 million. This trend reversal was caused by the negative contribution of residents (-12.2%), since non residents maintained a positive evolution (+2%).

The revenue from the activity revealed year-on-year decreases of 4.1% in total revenue and 3.6% in revenue from accommodation.

Table 1. Global provisional results from tourism activity

GLOBAL RESULTS	Month		Accumulated	
	Nov 11	Change rate % 11/10	Jan to Nov 11	Change rate % 11/10
HOTEL ESTABLISHMENTS				
Guests (thousand)	7518	-5.6	13 333.0	4.5
Overnight stays (thousand)	18815	-3.4	37 933.2	6.4
Residents in Portugal	6511	-12.2	12 800.6	-1.8
Non residents	1230.4	2.0	25 132.6	11.1
Average stay (no. of nights)	2.5	0.1	2.8	0.0
Net bed occupancy rate (%)	24.5	-14 p.p.	412	11p.p.
Total revenue (€Million)	92.2	-4.1	1830.8	6.5
Revenue from accommodation (€Million)	59.9	-3.6	1260.9	7.6
Rev Par (Average revenue per available room) (€)	17.0	-6.1	30.6	3.9

Overnight stays

In the period **January to November 2011** tourism accommodation activity accounted for 13.3 million guests, 4.5% more than in the same period of the previous year. The number of overnight stays was 37.9 million, corresponding likewise to growth, that reached 6.4%. Only non residents contributed for this growth (+11.1%) since residents recorded a 1.8% decrease.

Preliminary data for the month of **November 2011** shows overall decreasing results. The tourist accommodation establishments accommodated 751.8 million guests, 5.6% less than in the same month of the previous year. The number of overnight stays stood at 1.9 million, accounting for a less intense fall (-3.4%).

The tourist villages recorded a strong year-on-year increase (+22.2%) on the number of overnight stays which was due to increases on the offer side.

The apartment hotels grew by 2.6% as a result of the positive contribution of five and four star units. In hotels (-0.9%), the negative results from four and three star units were stronger than the increases in all the remaining units. The "*pousadas*" and the tourist apartments also presented decreasing results.

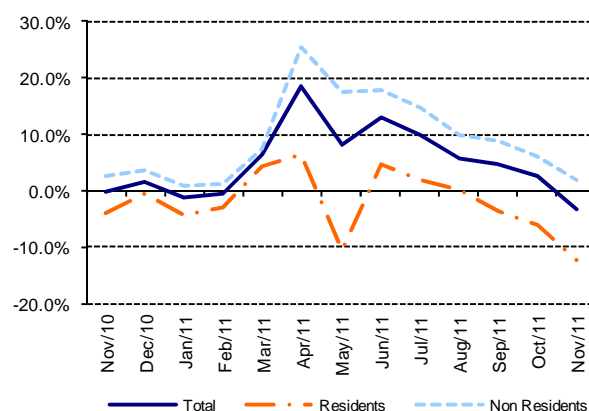
Table 2. Overnight stays by type and category of the establishment

Type of establishment and category	Overnight stays		Unit: Thousand
			Year-on-year change rate
	Nov-10	Nov-11	%
Total	1 948.1	1 881.5	-3.4
Hotels	1247.0	1236.0	-0.9
*****	205.4	223.1	8.6
****	592.1	571.0	-3.6
***	330.1	314.1	-4.8
** / *	119.5	127.8	6.9
Apartment hotels	276.1	283.2	2.6
*****	26.7	26.8	0.5
****	180.7	197.1	9.1
*** / **	68.7	59.3	-13.7
Pousadas	22.2	19.9	-10.6
Tourist apartments	117.7	113.4	-3.7
Tourist villages	41.3	50.4	22.2
Inns, Motels and Boarding houses	243.7	178.6	-26.7

The total of overnight stays spent by residents stood for 12.2% less than in November 2010, corresponding to 651.1 thousand. This performance deepens the negative trend observed in the last months.

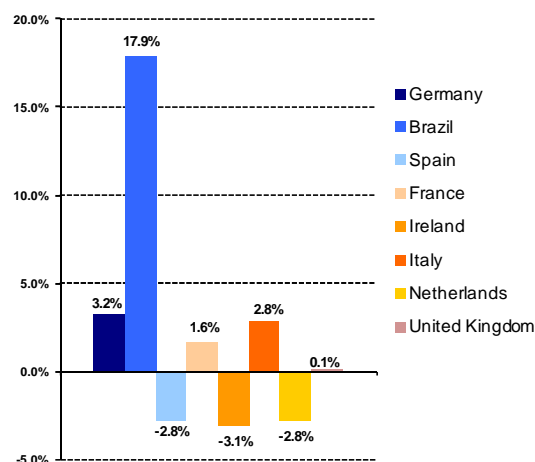
The number of overnight stays spent by non residents was 1.2 million (65.4% of the total), corresponding to a year-on-year increase of 2%.

Figure 1. Overnight stays, month-to-month change rate



The figures from the main markets of origin, representing 71.4% of overnight stays spent by non residents, revealed an overall positive evolution vis-à-vis the same period of the previous year. The Brazilian market presented the highest year-on-year increase with regard to this indicator (+17.9%). The German, Italian and French markets followed but with a slower pace. The British market kept stable, whereas the remaining markets accounted for decreasing numbers (Ireland, Spain and The Netherlands).

Figure 2. Overnight stays, by main markets of origin – month-to-month change rate – November 2011



The regional evolution of the total overnight stays was also negative. The less favorable results came from the regions of Alentejo, the North and the Centre. These regions decreased altogether by 6.7% when compared with November 2010. The regions of Algarve and Madeira presented the lowest year-on-year decreases, but still representing signs of a reversing trend towards last months.

All regions presented fairly year-on-year decreases in the number of overnight stays spent by residents. On the contrary, the demand from non residents kept growing, with the exception of the region of Madeira (-0.4%).

Table 3. Overnight stays by region (NUTS II)

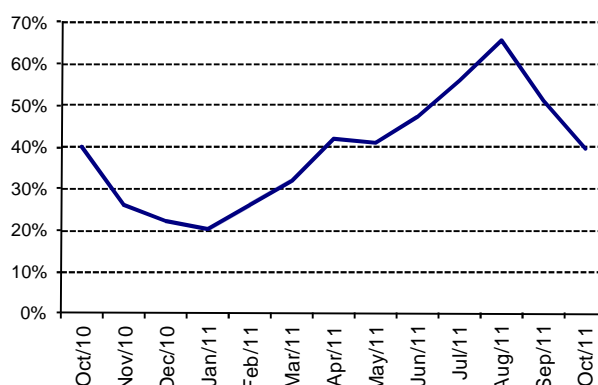
Unit: Thousand

NUTS II	Overnight stays		Year-on-year change rate
	Nov-10	Nov-11	%
PORTUGAL	1 948.1	1 881.5	-3.4
North	283.0	262.4	-7.3
Centre	230.0	217.9	-5.3
Lisbon	548.5	533.7	-2.7
Alentejo	69.3	63.1	-8.9
Algarve	445.2	440.5	-1.1
AZORES	44.8	42.9	-4.3
MADEIRA	327.3	321.1	-1.9

Net bed occupancy rate and Average Stay

In the month of **November** 2011, tourism accommodation establishments registered an occupancy rate of 24.5%, lower by 1.4 p.p. than in November 2010.

Figure 3. Net bed occupancy rate



All regions had their occupancy rates reduced, more so in the regions of Alentejo (-3.4 p.p.) and the North (-3.2 p.p.).

In November, the region of Madeira presented the best result (38.5%), followed by Lisbon (33.2%).

Table 4. Net bed occupancy rate and average stay, by region

NUTS II	Occupancy rate		Average stay	
	%		(No. of nights)	
	Nov-10	Nov-11	Nov-10	Nov-11
PORTUGAL	25.9	24.5	2.4	2.5
North	25.5	22.3	1.6	1.6
Centre	20.8	19.3	1.8	1.7
Lisbon	34.0	33.2	2.0	2.1
Alentejo	20.7	17.3	1.6	1.7
Algarve	19.5	18.9	4.5	4.6
AZORES	18.5	17.2	2.8	2.8
MADEIRA	39.8	38.5	5.2	5.3

The tourist villages were the only establishments recording a slight year-on-year increase (+0.7 p.p.) on the occupancy rate. The hotels recorded a decrease (-1.7 p.p.), with the contribution of all categories with the exception of five star units (+0.7 p.p.).

A similar outcome occurred in apartment hotels (-1.4 p.p.), where only five star units accounted for positive results (+4.3 p.p.).

The "pousadas" and the hotels recorded the highest figures in terms of the occupancy rate, above 27%. In hotels, five star units held the highest occupancy rate (31%).

Table 5. Net bed occupancy rate and average stay, by type and category of the establishment

Type of establishment and category	Occupancy rate		Average stay	
	%		(No. of nights)	
	Nov-10	Nov-11	Nov-10	Nov-11
Total	25.9	24.5	2.4	2.5
Hotels	29.0	27.3	2.2	2.2
*****	30.3	31.0	2.4	2.4
****	29.9	28.3	2.3	2.3
***	27.7	25.0	2.1	2.0
** / *	26.6	23.6	1.7	1.8
Apartment hotels	28.3	26.9	4.6	4.7
*****	34.3	38.6	5.2	5.8
****	28.9	26.7	4.7	5.0
*** / **	25.3	24.0	4.1	3.6
Tourist Apartments	16.0	15.4	6.0	6.2
Tourist villages	11.7	12.4	5.2	5.0
Pousadas	28.8	27.8	15	15
Inns, Motels and Boarding houses	22.7	20.1	2.1	2.1

The average stay was 2.5 nights, slightly above the one from November 2010 (2.4).

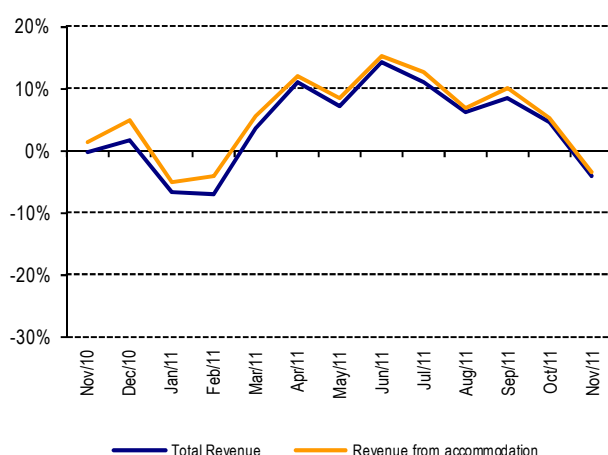
The regions of Madeira (5.3 nights) and the Algarve (4.6 nights) had longer average stays.

The tourist apartments recorded, in average, longer stays (6.2 nights). The tourist villages followed (5 nights) and apartment hotels (4.7). In the latter, five star units led.

Revenue and Average Revenue per Available Room (Rev Par)

In the month of **November 2011**, tourist accommodation activity accounted for EUR 92.2 million of total revenue, which stood for a 4.1% year-on-year fall. The total revenue from accommodation reached EUR 60 million, corresponding to a 3.6% decrease when compared with November 2010.

Figure 4. Total revenue and total revenue from accommodation - month-to-month change rate



The regional revenue evolution accounted for overall negative results. Only the region of Algarve had a year-on-year growth (+3.3%) in revenue from accommodation. In this region, the total revenue was almost the same as in the same period of the year before (-0.1%).

The North and Centre regions recorded the highest decreases in both indicators.

Table 6. Revenue by region (NUTS II)

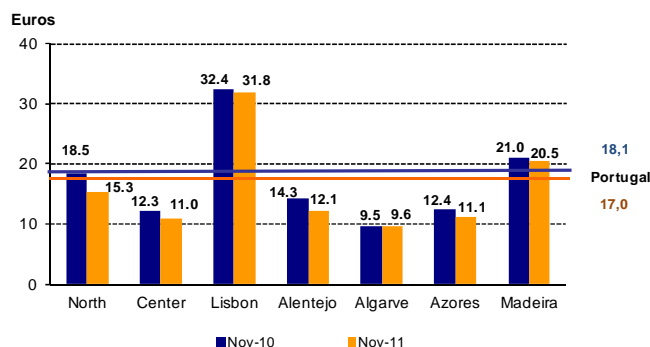
Unit: Million Euros

NUTS II	Total revenue	Year-on-year change rate	Revenue from accommodation	Year-on-year change rate
	Nov-11	%	Nov-11	%
Portugal	92.2	-4.1	59.9	-3.6
North	12.9	-9.0	8.7	-11.7
Centre	9.7	-13.5	6.1	-9.1
Lisbon	35.3	-1.6	24.4	-1.5
Alentejo	3.4	-6.7	2.1	-8.7
Algarve	14.7	-0.1	8.9	3.3
Azores	1.9	-8.0	1.3	-8.2
Madeira	14.3	-1.4	8.4	-0.9

In the period under review, Rev Par from tourist accommodation activity was EUR 17, lower by 6.1% than in November 2010.

The region of Algarve had a 1.1% increase on this indicator. The remaining regions accounted for year-on-year decreases, more so in the regions of the North (-17.3%) and the Alentejo (-15.4%).

Figure 5. Average revenue per room



The tourist apartments recorded a year-on-year increase of 12.8% in RevPar, higher than the one registered in the "Pousadas" (+11.5%). The remaining types of establishments recorded declining Rev Par, more so in apartment hotels (-10.3%) and in hotels (-6.7%).

In apartment hotels, only five star units presented a slightly better performance (+0.6%) but not enough to counteract the sharp falls of the remaining categories. In hotels, all categories contributed negatively for the global outcome.

Table 7. Average revenue per room, by type and category of the establishment

Unit: €

Type of establishment and category	RevPar		Year-on-year change rate
	Nov-10	Nov-11	%
Total	18.1	17.0	-6.1
Hotels	22.4	20.9	-6.7
*****	39.2	38.8	-1.0
****	21.6	20.5	-5.1
***	16.3	14.1	-13.5
** / *	15.9	12.8	-19.5
Apartment hotels	15.5	13.9	-10.3
*****	17.0	17.1	0.6
****	16.4	14.6	-11.0
*** / **	12.8	11.0	-14.1
Tourist apartments	4.7	5.3	12.8
Tourist villages	7.8	7.4	-5.1
Pousadas	20.8	23.2	11.5
Inns, Motels and Boarding houses	12.3	11.2	-8.9

In the period January to November 2011, tourist accommodation establishments recorded EUR 1 830.8 million of total revenue, 6.5% more than in the same period of the year before.

Revenue from accommodation reached EUR 1 260.9 million, corresponding to a year-on-year increase of 7.6%.

The Rev Par was EUR 30.6, higher by 3.9% when compared with results from the same period of the year before.

Methodology notes

Net bed occupancy rate – the relation between the number of overnight stays and the number of available beds, in the reference period, accounting two beds for each double bed.

RevPar (*Revenue per Available Room*) – Revenue per available room, measured by the relation between the revenues from accommodation and the number of available rooms, in the reference period.

Year-on-year change rates – the calculation of year-on-year change rates for the main indicators is based on values in units, although in this press release they are visible only in thousands.

Date of next press release: 10th of February 2012