

Tourism Activity
April 2019

Tourism activity accelerates with the Easter

The tourism accommodation sector¹ registered 2.3 million guests and 5.8 million overnight stays in April 2019, corresponding to rates of change² of +9.1% and +9.5%, respectively (+4.2% and +0.7% in March, in the same order). Overnight stays from residents increased by 16.0% (+5.1% in March) and those from non residents went up by 7.1% (-0.9% in the previous month), with this latter situation reflecting mainly the growth rate of tourists from Spain.

In April 2019, the average stay (2.57 nights) grew by 0.4% (+5.1% considering residents and -1.1% for non residents).

The net bed occupancy rate (48.7%) increased by 1.9 p.p. in April (-1.4 p.p. in March).

Revenue accelerated, with the total increasing by 9.6% (+3.7% in March) and reaching EUR 331.5 million. Revenue from accommodation (EUR 245.0 million) rose by 10.3% (+1.9% in March).

These results were influenced by the effect of the holiday period associated with Easter, which this year occurred in mid-April, while in the previous year had an influence spread between March and April.

Figure 1. Global results of the tourism accommodation sector

| Global preliminary results | Unit | March 2019 | | April 2019 | | Jan - Apr 19 | |
|---|-----------------------|----------------|--------------------------|----------------|--------------------------|-----------------|--------------------------|
| | | Value | Year-on-year change rate | Value | Year-on-year change rate | Value | Year-on-year change rate |
| Guests | 10³ | 1 834.9 | 4.2 | 2 276.4 | 9.1 | 6 711.7 | 5.9 |
| Residents in Portugal | " | 782.8 | 8.6 | 862.7 | 10.5 | 2 834.9 | 6.5 |
| Residents abroad | " | 1 052.1 | 1.2 | 1 413.8 | 8.2 | 3 876.8 | 5.4 |
| Overnight stays | 10³ | 4 567.6 | 0.7 | 5 847.6 | 9.5 | 16 670.3 | 3.9 |
| Residents in Portugal | " | 1 341.7 | 5.1 | 1 655.9 | 16.0 | 4 950.5 | 6.6 |
| Residents abroad | " | 3 225.9 | -0.9 | 4 191.8 | 7.1 | 11 719.7 | 2.7 |
| Average stay | no. of nights | 2.49 | -3.3 | 2.57 | 0.4 | 2.48 | -1.9 |
| Residents in Portugal | " | 1.71 | -3.2 | 1.92 | 5.1 | 1.75 | 0.1 |
| Residents abroad | " | 3.07 | -2.1 | 2.97 | -1.1 | 3.02 | -2.5 |
| Net bed occupancy rate | % | 39.2 | -1.4 p.p. | 48.7 | 1.9 p.p. | 37.9 | -0.1 p.p. |
| Total revenue | EUR 10 ⁶ | 248.2 | 3.7 | 331.5 | 9.6 | 914.2 | 6.8 |
| Revenue from accommodation | " | 177.0 | 1.9 | 245.0 | 10.3 | 655.4 | 6.1 |
| RevPAR (Average revenue per available room) | EUR | 34.2 | -1.7 | 46.2 | 5.3 | 33.5 | 2.3 |

Overnight stays on the rise

In April 2019, the tourism accommodation sector registered 2.3 million guests who spent 5.8 million overnight stays, corresponding to rates of change of +9.1% and +9.5% respectively (+4.2% and +0.7% in March, in the same order). It should be pointed out that the results were influenced by the calendar effect of the holiday period associated to the Easter, which, in the current year, took place in April, while in the previous year had an influence spread between March and April.

¹ Monthly series which, similarly to the annual one, includes three types of accommodation segment: hotels and similar (hotels, apartment hotels, tourist apartments, tourist villages, pousadas and quintas da Madeira), local accommodation with 10 or more beds (according to the statistical threshold defined by EU Regulation 692/2011) and rural/lodging tourism.

² Unless stated otherwise, the rates of change presented in this press release correspond to year-on-year rates of change.

Overnight stays spent in hotels and similar (84.7% of the total) increased by 8.0% in April. Overnight stays spent in local accommodation establishments (12.7% of the total) grew by 17.2% while those spent in rural/lodging tourism (2.5% of the total) grew by 22.6%.

Figure 2. Overnight stays in tourism accommodation establishments by type and category

Unit: 10³

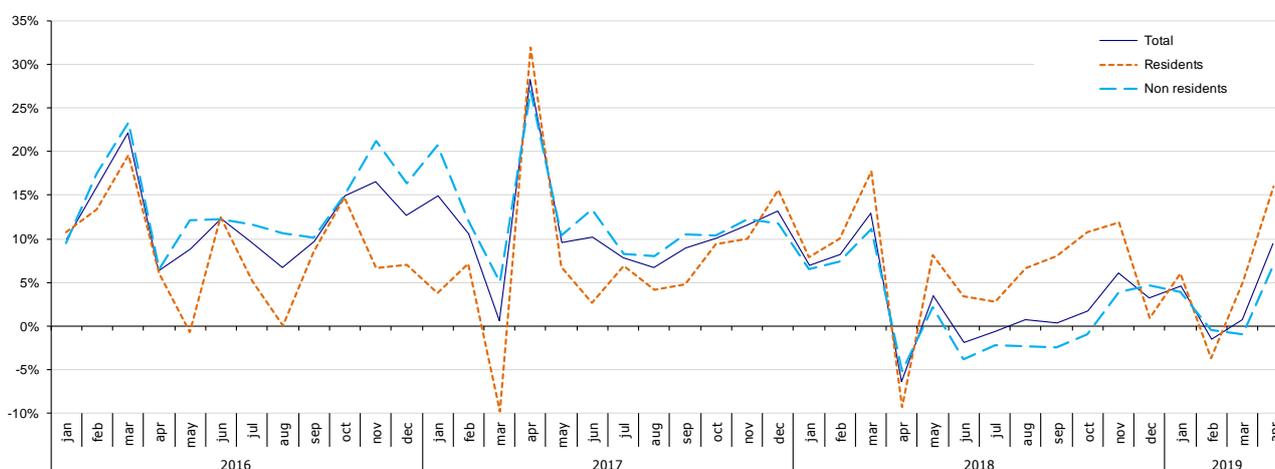
| Type of establishment and category | Overnight stays | | | Year-on-year change rates (%) | |
|--|-----------------|----------------|-----------------|-------------------------------|--------------|
| | Apr-18 | Apr 19 | Jan - Apr 19 | Apr 19 | Jan - Apr 19 |
| Total | 5 342.1 | 5 847.6 | 16 670.3 | 9.5 | 3.9 |
| Hotels and similar | 4 585.5 | 4 954.4 | 14 170.1 | 8.0 | 3.1 |
| Hotels | 3 353.2 | 3 610.8 | 10 543.5 | 7.7 | 3.3 |
| ***** | 601.3 | 677.2 | 1 958.4 | 12.6 | 6.4 |
| **** | 1 675.3 | 1 767.1 | 5 132.2 | 5.5 | 1.8 |
| *** | 758.1 | 818.5 | 2 417.3 | 8.0 | 4.4 |
| ** / * | 318.5 | 348.1 | 1 035.7 | 9.3 | 2.8 |
| Apartment hotels | 616.9 | 654.6 | 1 853.0 | 6.1 | 2.8 |
| ***** | 38.7 | 64.1 | 173.0 | 65.7 | 44.0 |
| **** | 456.2 | 475.0 | 1 350.7 | 4.1 | 2.9 |
| *** / ** | 122.1 | 115.4 | 329.3 | -5.4 | -10.9 |
| Pousadas and quintas da Madeira | 70.1 | 69.8 | 219.9 | -0.6 | -6.1 |
| Tourist apartments | 352.8 | 409.9 | 985.9 | 16.2 | 5.6 |
| Tourist villages | 192.6 | 209.3 | 567.7 | 8.7 | 0.8 |
| Local accommodation | 635.7 | 745.0 | 2 150.2 | 17.2 | 8.3 |
| Tourism in rural areas and lodging tourism | 120.9 | 148.2 | 350.0 | 22.6 | 7.1 |

The internal market with a steep increase

In April, the internal market contributed with 1.7 million overnight stays, which stood for a 16.0% growth (+5.1% in March). Overnight stays from the external markets (share of 71.7% in April) increased by 7.1% (-0.9% in March) and attained to 4.2 million.

In the first four months of the year, the total of overnight stays increased by 3.9%, with the positive contribution of both residents (+6.6%) and non residents (+2.7%).

Figure 3. Overnight stays in tourism accommodation establishments - Year-on-year rates of change



The Spanish market grew expressively

The sixteen main inbound markets³ represented 86.9% of total overnight stays of non residents spent in tourism accommodation establishments in April.

The British market (18.9% of the total overnight stays of non residents in April) grew by 2.2% in this month and by 2.5% considering the first four months of the year.

Overnight stays of German guests (12.8% of the total) declined by 3.7% in April and by 5.7% since the beginning of the year.

The Spanish market (11.3% of the total), traditionally sensitive to the "Easter effect", grew steeply by 55.7% in April. This market grew by 4.5% since the beginning of the year.

In the case of the French market (10.3% of the total), there was a slight decline (-0.5%) in April. When considering the first four months of the year, this market had a 1.9% reduction.

The Brazilian market (5.3% of the total) grew by 10.2% in April and by 8.2% in the first four months of the year.

In April, the emphasis was also on the increases recorded in the Canadian (+30.2%), North American (+18.8%) and Irish (+18.4%) markets. Since the beginning of the year, the North American (+23.4%), Chinese (+17.9%) and Canadian (+17.8%) markets were noteworthy.

Figure 4. Overnight stays in tourism accommodation establishments by main (16) inbound markets: year-on-year and cumulative year-on-year rates of change



³ Based on the provisional results of overnight stays in 2018.

Overnight stays increased in all regions except in RA Madeira

In April, there were increases in all regions except in RA Madeira (-5.2%). The Alentejo (+25.7%) stood out, followed by the Algarve (+13.6%) and RA Açores (+12.9%). The Algarve concentrated 30.5% of total overnight stays in this month, followed by AM Lisboa (27.2% share).

In this month, the number of overnight stays increased by 505.5 thousand (vis-à-vis the same month of the previous year), of which 42.2% from the Algarve (213.2 thousand additional overnight stays), 21.2% from AM Lisboa (increase of 107.0 thousand overnight stays) and 19.3% from the Norte (97.4 thousand more overnight stays).

Considering the first four months of the year, the emphasis goes to the increases in the Alentejo (+12.5%) and in the Norte (+7.1%). In this period, AM Lisboa concentrated 29.9% of the overnight stays, followed by the Algarve (25.0% of the total).

In April, overnight stays of residents recorded steep increases in the Algarve (+34.1%) and in the Alentejo (+30.7%). The increases in overnight stays registered in RA Açores (+17.7%), Centro (+13.3%) and Norte (+11.0%) are also worth mentioning. In the first four months of the year, the Alentejo stood out by growing 18.2%.

With regard to overnight stays of non residents, in April, the increases in the Alentejo (+17.4%) and in the Norte (+13.3%) stood out. Since the beginning of the year, the emphasis goes to the increase registered in the Norte (+7.6%).

Figure 5. Overnight stays in tourism accommodation establishments by NUTS II regions

Unit: 10³

| NUTS II | Total of overnight stays | | | | Overnight stays from residents | | | | Overnight stays from non residents | | | |
|-----------------|--------------------------|-----------------------|-----------------|-----------------------|--------------------------------|-----------------------|----------------|-----------------------|------------------------------------|-----------------------|-----------------|-----------------------|
| | Apr 19 | | Jan - Apr 19 | | Apr 19 | | Jan - Apr 19 | | Apr 19 | | Jan - Apr 19 | |
| | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) |
| Portugal | 5 847.6 | 9.5 | 16 670.3 | 3.9 | 1 655.9 | 16.0 | 4 950.5 | 6.6 | 4 191.8 | 7.1 | 11 719.7 | 2.7 |
| Norte | 884.0 | 12.4 | 2 593.2 | 7.1 | 346.7 | 11.0 | 1 137.7 | 6.4 | 537.2 | 13.3 | 1 455.5 | 7.6 |
| Centro | 577.7 | 10.4 | 1 641.1 | 3.3 | 319.6 | 13.3 | 999.5 | 2.7 | 258.1 | 7.0 | 641.6 | 4.2 |
| AM Lisboa | 1588.9 | 7.2 | 4 987.9 | 3.3 | 313.6 | 7.1 | 1 131.6 | 3.0 | 1 275.3 | 7.2 | 3 856.3 | 3.4 |
| Alentejo | 231.6 | 25.7 | 626.7 | 12.5 | 149.5 | 30.7 | 427.1 | 18.2 | 82.1 | 17.4 | 199.6 | 2.0 |
| Algarve | 1784.3 | 13.6 | 4 166.5 | 5.2 | 363.8 | 34.1 | 773.0 | 12.2 | 1 420.5 | 9.3 | 3 393.5 | 3.8 |
| RA Açores | 172.3 | 12.9 | 449.9 | 5.9 | 93.8 | 17.7 | 265.8 | 13.7 | 78.5 | 7.7 | 184.1 | -3.7 |
| RA Madeira | 608.8 | -5.2 | 2 205.0 | -2.8 | 68.8 | -7.2 | 215.8 | -1.0 | 540.1 | -5.0 | 1 989.2 | -3.0 |

Overnight stays by municipality

Figure 6 shows the municipalities that concentrate 75% of overnight stays in tourism accommodation establishments in the country⁴.

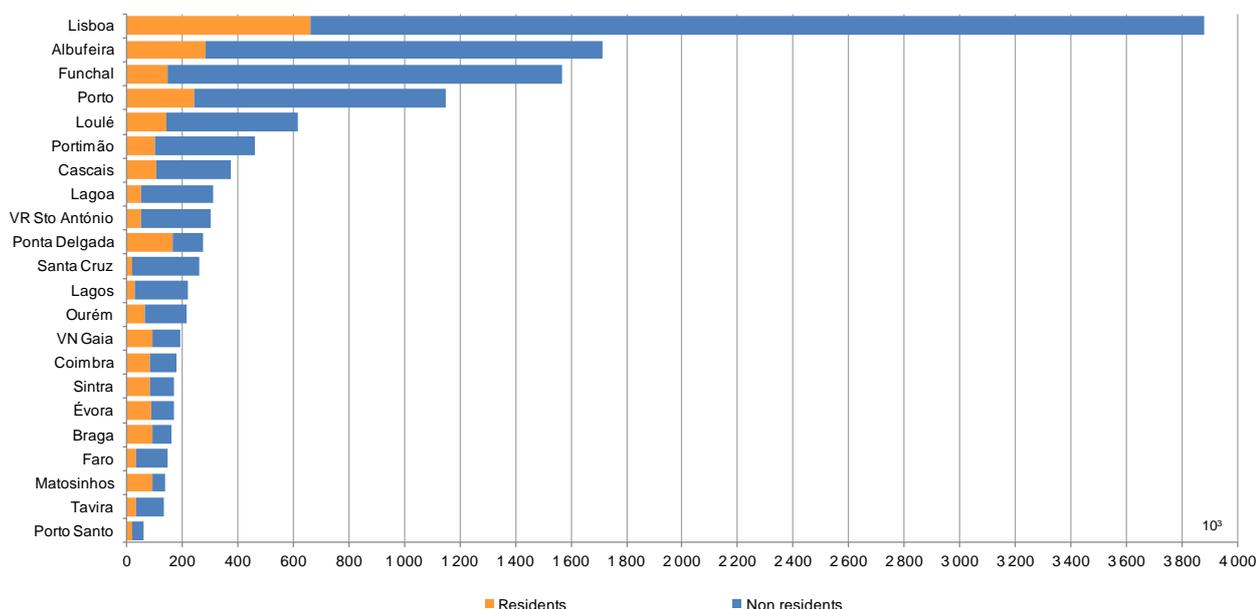
Lisboa concentrated 20.5% of the total overnight stays in April, a share rising to 23.3% when considering the first four months of the year. In the latter period, overnight stays of non residents, in Lisbon, stood for 82.9% of the total overnight stays registered in the municipality, with Lisboa concentrating 27.5% of the total overnight stays of non residents in the country.

Albufeira registered 13.4% of the total overnight stays in April and 10.3% when considering the first four months of the year. In this four-month period, overnight stays of non residents stood for a share of 83.3% in this municipality, while Albufeira concentrated 12.2% of the total overnight stays in the country spent by non residents.

Funchal stood for 7.0% of the total overnight stays in April and for 9.4% since the beginning of the year. Non residents corresponded to 90.6% of overnight stays spent in this municipality in the first four months of the year.

Porto held shares of 6.5% of the total overnight stays in April and of 6.9% since the beginning of the year. The weight of non residents was less expressive (78.8% from January to April) than in the municipalities mentioned above.

Figure 6. Overnight stays in tourism accommodation establishments, by main municipalities, accumulated period January-April 2019



⁴ Based on the provisional results of overnight stays in 2018; the specificities of local accommodation are included in the explanatory notes at the end of this press release.

Overnight stays in hostels were around 1/5 of the overnight stays in local accommodation in the period January-April 2019

In the first four months of 2019, overnight stays in hotels and similar (85.0% of the total) increased by 3.1%, below the other accommodation segments: +7.1% in rural/lodging tourism (2.1% of the total) and +8.3% in local accommodation (12.9% share). Hostels represented 22.7% of overnight stays in local accommodation and 2.9% of the total overnight stays, in the accumulated period until April.

In what concerns hotels and similar, AM Lisboa concentrated 28.7% of overnight stays in the first four months of the year, followed by the Algarve (share of 27.6% in hotels and similar).

Considering local accommodation establishments, since the beginning of the year, AM Lisboa represented 42.6% of overnight stays, followed by the Norte with a 22.4% share.

As regards rural/lodging tourism, the Norte attracted 27.4% of the total overnight stays, followed by the Centro and the Alentejo (shares of 25.1% and 22.6%, respectively), in the accumulated period since January.

As for hotels and similar, the municipalities of Lisboa and Albufeira contributed with the largest shares, since the beginning of the year (22.1% and 11.9%). As regards local accommodation, Lisboa and Porto were the two municipalities that presented the largest shares (35.1% and 12.5%, respectively).

Overnight stays in hostels were concentrated mainly in the AM Lisboa (56.0% of the national total), with the emphasis on the municipality of Lisboa (47.6%), and in the Norte (23.9%), namely in the municipality of Porto (17.4%).

Slight increase in the average stay, with the contribution of residents

In April, the average stay in tourism accommodation establishments (2.57 nights) increased slightly (+0.4%). The average stays of residents grew by 5.1% while that of non residents declined by 1.1%. In this month, there were increases in the average stay in all regions with the exception of the Algarve (-2.3%), with Alentejo having stood out (+9.6%). In RA Madeira and in the Algarve the average rate stays reached 4.77 and 3.93 nights, respectively.

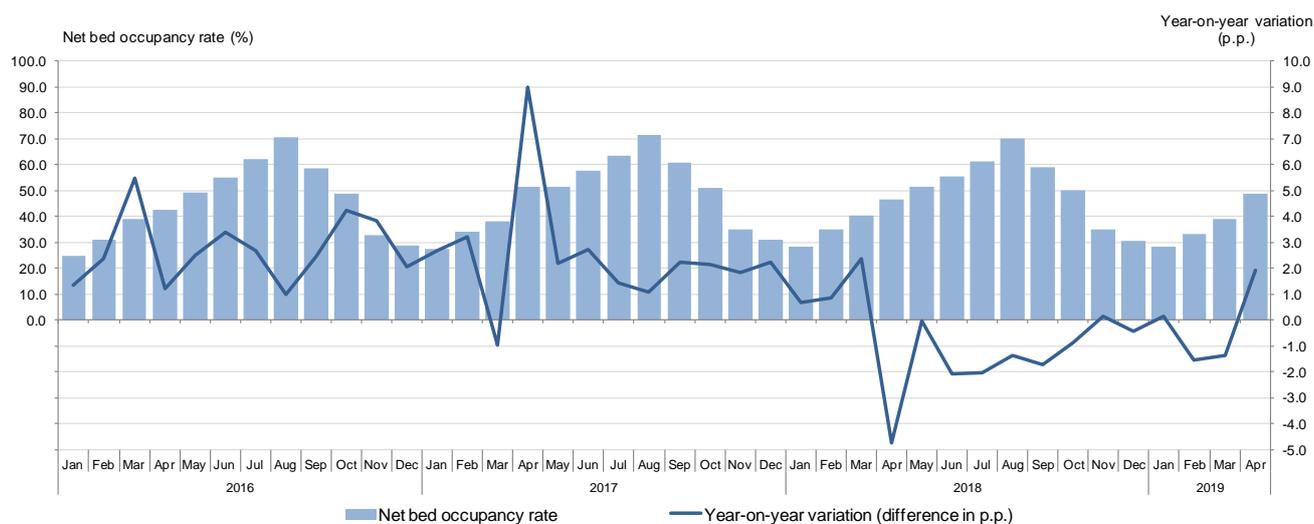
Figure 7. Average stay and net bed occupancy rate in tourism accommodation establishments, by NUTS II

| NUTS II | Average stay | | | | Occupancy rate | | | |
|-----------------|---------------|-----------------------|---------------|-----------------------|----------------|------------------------|--------------|------------------------|
| | Apr 19 | | Jan - Apr 19 | | Apr 19 | | Jan - Apr 19 | |
| | No. of nights | Y-o-y change rate (%) | No. of nights | Y-o-y change rate (%) | % | Y-o-y variation (p.p.) | % | Y-o-y variation (p.p.) |
| Portugal | 2.57 | 0.4 | 2.48 | -1.9 | 48.7 | 1.9 | 37.9 | -0.1 |
| Norte | 1.83 | 0.8 | 1.76 | -0.8 | 44.3 | 1.1 | 34.2 | 0.0 |
| Centro | 1.68 | 0.3 | 1.62 | -0.5 | 33.5 | 2.1 | 25.5 | 0.4 |
| AM Lisboa | 2.33 | 1.3 | 2.25 | -1.7 | 62.0 | 0.1 | 49.3 | -1.5 |
| Alentejo | 1.77 | 9.6 | 1.70 | 3.9 | 34.1 | 5.1 | 25.5 | 2.5 |
| Algarve | 3.93 | -2.3 | 3.98 | -4.6 | 48.5 | 4.6 | 34.6 | 0.8 |
| RA Açores | 3.09 | 5.8 | 2.90 | 0.6 | 49.9 | 3.6 | 34.3 | 0.7 |
| RA Madeira | 4.77 | 5.0 | 5.03 | 0.3 | 59.9 | -4.6 | 54.9 | -3.8 |

Increase in the occupancy rate

In April, the net bed occupancy rate (48.7%) in tourism accommodation establishments increased by 1.9 p.p. (-1.4 p.p. in March). The highest occupancy rates were recorded in AM Lisboa (62.0%) and in RA Madeira (59.9%). The largest increases in this indicator occurred in the Alentejo (+5.1 p.p.) and in the Algarve (+4.6 p.p.).

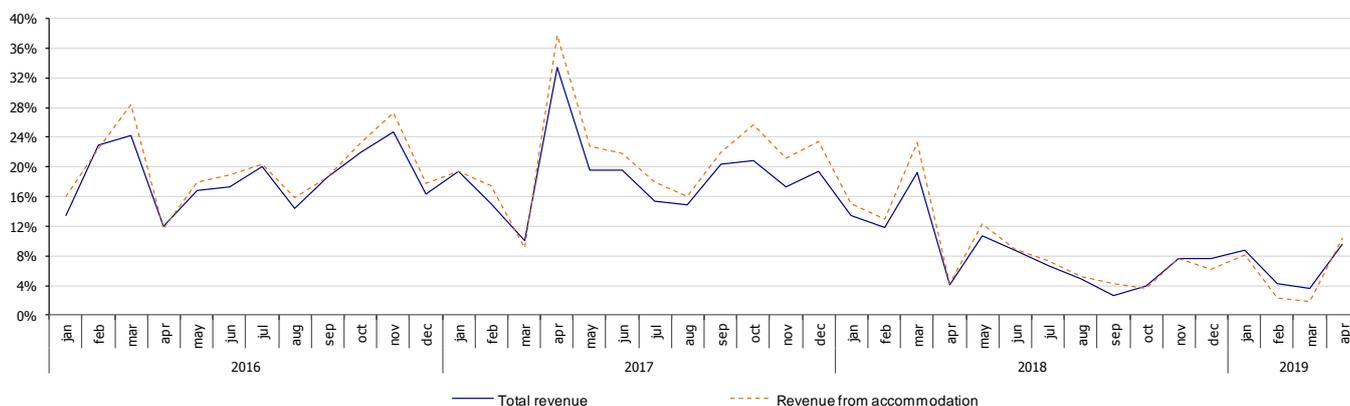
Figure 8. Net bed occupancy rate in tourism accommodation establishments



Acceleration in revenue

Total revenue in tourism accommodation establishments amounted to EUR 331.5 million and revenue from accommodation stood at EUR 245.0 million, in April, corresponding to increases of 9.6% and 10.3%, respectively (+3.7% and +1.9% in March, in the same order).

Figure 9. Total revenue and revenue from accommodation in tourism accommodation establishments: Year-on-year rates of change



In April, amongst the various regions, the emphasis went to the increases in the Alentejo (+27.5% in total revenue and +32.0% in revenue from accommodation), Algarve (+19.2% and +19.0%, respectively) and RA Açores (+17.3% and +17.4%, in the same order).

Figure 10. Revenue in tourism accommodation establishments, by NUTS II regions

| NUTS II | Total revenue | | | | Revenue from accommodation | | | |
|-----------------|---------------------|-----------------------|---------------------|-----------------------|----------------------------|-----------------------|---------------------|-----------------------|
| | Apr 19 | | Jan - Apr 19 | | Apr 19 | | Jan - Apr 19 | |
| | EUR 10 ⁶ | Y-o-y change rate (%) | EUR 10 ⁶ | Y-o-y change rate (%) | EUR 10 ⁶ | Y-o-y change rate (%) | EUR 10 ⁶ | Y-o-y change rate (%) |
| Portugal | 331.5 | 9.6 | 914.2 | 6.8 | 245.0 | 10.3 | 655.4 | 6.1 |
| Norte | 49.9 | 12.2 | 143.6 | 11.3 | 38.9 | 13.8 | 107.9 | 10.6 |
| Centro | 27.2 | 9.4 | 80.0 | 5.0 | 19.3 | 11.1 | 55.1 | 5.4 |
| AM Lisboa | 114.9 | 7.2 | 340.8 | 7.1 | 91.0 | 7.6 | 259.2 | 6.0 |
| Alentejo | 12.4 | 27.5 | 32.8 | 16.1 | 9.1 | 32.0 | 22.9 | 16.4 |
| Algarve | 85.7 | 19.2 | 181.6 | 11.3 | 58.5 | 19.0 | 119.9 | 8.8 |
| RA Açores | 8.3 | 17.3 | 20.2 | 10.2 | 6.1 | 17.4 | 14.2 | 9.4 |
| RA Madeira | 33.1 | -11.0 | 115.2 | -6.5 | 22.1 | -10.4 | 76.3 | -5.6 |

The evolution of revenue was overall positive amongst the three different accommodation segments and typologies.

Hotels and similar, in terms of total revenue and revenue from accommodation (shares of 89.3% and 87.6%, respectively), registered increases of 8.2% and 8.6%, by the same order, in April.

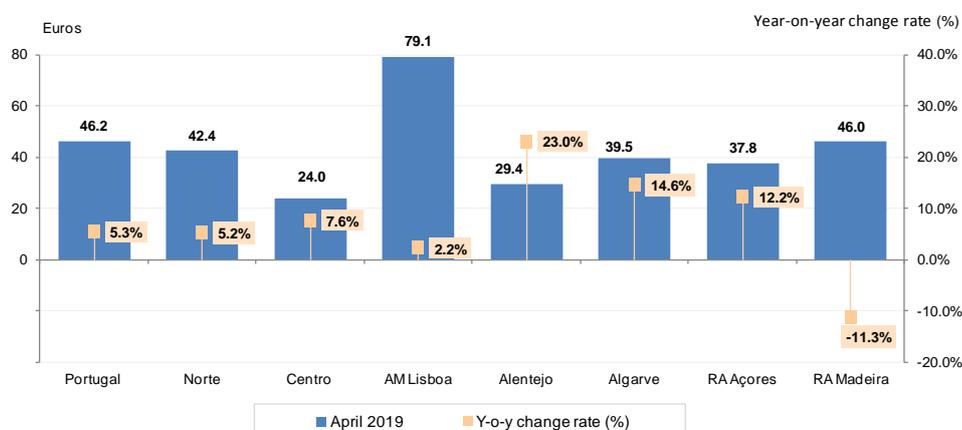
Local accommodation, as regards the same variables (shares of 8.1% and 9.8%), increased by 23.9% and by 25.4%, respectively, while rural/lodging tourism (share of 2.6% in both types of revenue) increased by 21.4% and by 19.4%, in the same order.

Figure 11. Revenue in tourism accommodation establishments, by accommodation segment and type

| NUTS II | Total revenue | | | | Revenue from accommodation | | | |
|---|---------------------|-----------------------|---------------------|-----------------------|----------------------------|-----------------------|---------------------|-----------------------|
| | Apr 19 | | Jan - Apr 19 | | Apr 19 | | Jan - Apr 19 | |
| | EUR 10 ⁶ | Y-o-y change rate (%) | EUR 10 ⁶ | Y-o-y change rate (%) | EUR 10 ⁶ | Y-o-y change rate (%) | EUR 10 ⁶ | Y-o-y change rate (%) |
| Total | 331.5 | 9.6 | 914.2 | 6.8 | 245.0 | 10.3 | 655.4 | 6.1 |
| Hotels and similar | 296.2 | 8.2 | 820.2 | 6.1 | 214.6 | 8.6 | 576.7 | 5.2 |
| Hotels | 238.9 | 7.4 | 673.3 | 6.3 | 172.5 | 7.4 | 472.0 | 5.0 |
| Apartment hotels | 28.3 | 9.0 | 75.8 | 6.0 | 19.8 | 10.3 | 51.3 | 5.6 |
| Pousadas and quintas da Madeira | 6.6 | 3.0 | 20.3 | -1.7 | 4.6 | 4.3 | 13.5 | -2.5 |
| Tourist apartments | 12.1 | 26.4 | 26.6 | 11.6 | 9.9 | 28.7 | 21.8 | 13.7 |
| Tourist villages | 10.4 | 10.2 | 24.3 | 2.6 | 7.8 | 13.3 | 18.1 | 6.0 |
| Local accommodation | 26.8 | 23.9 | 72.9 | 12.6 | 23.9 | 25.4 | 63.3 | 13.0 |
| Tourism in rural areas and lodging tourism | 8.5 | 21.4 | 21.1 | 13.8 | 6.5 | 19.4 | 15.5 | 10.5 |

In the tourism accommodation establishments, the average revenue per available room (RevPAR) was EUR 46.2 in April (+5.3%; -1.7% in March). The AM Lisboa accounted for the highest RevPAR (EUR 79.1). As regards this indicator, the emphasis went to the increases in the Alentejo (+23.0%), Algarve (+14.6%) and RA Açores (+12.2%).

Figure 12. Average revenue per available room in tourism accommodation establishments, by regions



The evolution of RevPAR was mostly positive concerning the different typologies and respective categories, i.e. +5.2% in hotels and similar, +11.8% in local accommodation and +10.2% in rural/lodging tourism. Tourist apartments stood out with +22.4%.

Figure 13. RevPAR in tourism accommodation establishments, by type and category

| Type of establishment and category | RevPAR (€) | | | Year-on-year change rate (%) | |
|--|-------------|-------------|--------------|------------------------------|--------------|
| | Apr-18 | Apr 19 | Jan - Apr 19 | Apr 19 | Jan - Apr 19 |
| Total | 43.8 | 46.2 | 33.5 | 5.3 | 2.3 |
| Hotels and similar | 48.4 | 50.9 | 36.6 | 5.2 | 2.1 |
| Hotels | 53.8 | 55.8 | 40.2 | 3.7 | 0.8 |
| ***** | 93.0 | 95.0 | 67.7 | 2.2 | 1.4 |
| **** | 54.4 | 56.2 | 40.4 | 3.4 | -0.8 |
| *** | 36.5 | 38.3 | 27.6 | 4.9 | 1.7 |
| ** / * | 29.1 | 31.1 | 23.6 | 6.9 | 3.2 |
| Apartment hotels | 39.5 | 43.7 | 30.5 | 10.7 | 5.3 |
| ***** | 50.1 | 85.4 | 55.4 | 70.4 | 44.1 |
| **** | 41.2 | 42.3 | 29.7 | 2.7 | -1.5 |
| *** / ** | 30.1 | 29.6 | 21.5 | -1.5 | -1.8 |
| Pousadas and quintas da Madeira | 75.6 | 80.2 | 59.8 | 6.1 | -0.5 |
| Tourist apartments | 21.6 | 26.5 | 18.1 | 22.4 | 13.6 |
| Tourist villages | 30.1 | 32.8 | 20.5 | 9.0 | 6.4 |
| Local accommodation | 27.0 | 30.2 | 22.4 | 11.8 | 5.4 |
| Tourism in rural areas and lodging tourism | 19.8 | 21.8 | 15.6 | 10.2 | 8.1 |

Camping sites and holiday camps

In April 2019, camping sites welcomed 110.6 thousand campers (+32.4%) that spent 340.9 thousand overnight stays (+32.7%). Both the internal (+47.0%) and the external (+20.6%) markets contributed to the increase in overnight stays. Overnight stays of residents were predominant standing for 50.8% of the total overnight stays. The average stay (3.08 nights) increased by 0.2%.

Holiday camps and youth hostels hosted 34.1 thousand guests (+30.5%) and 64.1 thousand overnight stays (+33.0%). The internal market concentrated 66.8% of the total overnight stays and grew by 28.5%, nevertheless below the growth registered in the external markets (+42.9%). The average stay (1.88 nights) increased by 1.9%.

Accommodation activity – overall view

In April 2019, considering all means of accommodation (tourism accommodation establishments, camping sites and holiday camps and youth hostels), there were 2.4 million guests who spent 6.3 million overnight stays, corresponding to rates of change of +10.2% and +10.7%, respectively (+4.9% and +1.4% in March, in the same order).

Overnight stays of residents increased by 18.6% in April (+7.3% in March) and those of non residents grew by 7.7% (-1.0% in the previous month).

In this global set of accommodation establishments, the average stay (2.58 nights) increased by 0.5% (+5.6% from residents and -1.2% from non residents).

Having in consideration the first four months of the year, with regard to all means of accommodation, the number of overnight stays increased by 4.5% with both the positive contribution of residents (+8.1%) and non residents (+2.9%).

Figure 14. Main indicators of accommodation activity

| NUTS II | | Total | | | | Residents | | | | Non residents | | | |
|--------------------------------------|-----------------|----------------|-----------------------|-----------------|-----------------------|----------------|-----------------------|----------------|-----------------------|----------------|-----------------------|-----------------|-----------------------|
| | | Apr 19 | | Jan - Apr 19 | | Apr 19 | | Jan - Apr 19 | | Apr 19 | | Jan - Apr 19 | |
| | | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) | Value | Y-o-y change rate (%) |
| Guests | | | | | | | | | | | | | |
| Total | 10 ³ | 2 421.1 | 10.2 | 7 094.4 | 6.4 | 941.1 | 12.3 | 3 055.6 | 7.6 | 1 480.0 | 8.9 | 4 038.8 | 5.6 |
| Tourist accommodation establishments | " | 2 276.4 | 9.1 | 6 711.7 | 5.9 | 862.7 | 10.5 | 2 834.9 | 6.5 | 1 413.8 | 8.2 | 3 876.8 | 5.4 |
| Camping sites | " | 110.6 | 32.4 | 292.5 | 18.6 | 54.8 | 42.7 | 152.9 | 28.3 | 55.8 | 23.7 | 139.6 | 9.5 |
| Holiday camps and youth hostels | " | 34.1 | 30.5 | 90.2 | 14.8 | 23.7 | 25.7 | 67.8 | 14.4 | 10.4 | 43.3 | 22.4 | 15.8 |
| Overnight stays | | | | | | | | | | | | | |
| Total | 10 ³ | 6 252.7 | 10.7 | 17 907.3 | 4.5 | 1 872.0 | 18.6 | 5 549.7 | 8.1 | 4 380.7 | 7.7 | 12 357.6 | 2.9 |
| Tourist accommodation establishments | " | 5 847.6 | 9.5 | 16 670.3 | 3.9 | 1 655.9 | 16.0 | 4 950.5 | 6.6 | 4 191.8 | 7.1 | 11 719.7 | 2.7 |
| Camping sites | " | 340.9 | 32.7 | 1 067.5 | 13.9 | 173.3 | 47.0 | 479.1 | 25.5 | 167.6 | 20.6 | 588.5 | 5.9 |
| Holiday camps and youth hostels | " | 64.1 | 33.0 | 169.5 | 11.5 | 42.8 | 28.5 | 120.0 | 11.7 | 21.3 | 42.9 | 49.4 | 10.9 |
| Average stay | | | | | | | | | | | | | |
| Total | no. Nights | 2.58 | 0.5 | 2.52 | -1.8 | 1.99 | 5.6 | 1.82 | 0.5 | 2.96 | -1.2 | 3.06 | -2.5 |
| Tourist accommodation establishments | " | 2.57 | 0.4 | 2.48 | -1.9 | 1.92 | 5.1 | 1.75 | 0.1 | 2.97 | -1.1 | 3.02 | -2.5 |
| Camping sites | " | 3.08 | 0.2 | 3.65 | -3.9 | 3.17 | 3.0 | 3.13 | -2.1 | 3.00 | -2.5 | 4.22 | -3.3 |
| Holiday camps and youth hostels | " | 1.88 | 1.9 | 1.88 | -2.9 | 1.81 | 2.3 | 1.77 | -2.4 | 2.05 | -0.2 | 2.21 | -4.3 |

EXPLANATORY NOTES

The sources used in this press release are: Survey on guest stays in hotel establishments and other accommodations, Survey on guest stays in camping sites and Survey on guest stays in holiday camps and youth hostels.

Data made available in this press release relates to establishments operating in each reference period, considering:

2018 – January to December: provisional results; 2019 – January to March: provisional results; April: preliminary results.

In between preliminary, provisional and final data, results are revised due to definitive answers instead of provisional and mainly due to the replacement of non response estimates by effective responses. These effective responses include situations of suspended activity (seasonal, temporarily for other reasons or definitive) not duly reported, resulting on substitution of estimates by null result, a situation with higher occurrence during the low season.

The degree of revision, measured by the difference in percentage points from the year-on-year change rates of provisional versus preliminary data is as follows:

| | Overnight stays | Revenue from accommodation |
|----------------|-----------------|----------------------------|
| Jan. to Mar.19 | +0.4 p.p. | +0.2 p.p. |

Guest – Individual that spends at least one overnight stay in a tourism accommodation activity establishment.

Overnight stay – Time spent by an individual between midday and midday of the following day.

Average stay – Relation between the number of overnight stays and the number of guests that originated those overnight stays during the reference period.

Net bed occupancy rate – corresponds to the relation between the number of overnight stays and the number of available beds, in the reference period, counting as two beds each double bed.

Total revenue – revenue from the activity of tourism accommodation establishments: room renting, food and beverage and others related to the activity itself (assignment of spaces, laundry, tobacco, communications, etc.).

Revenue from accommodation – revenue from overnight stays spent by guests in all tourist accommodation establishments.

RevPAR – Revenue per available room, measured by the relation between the revenue from accommodation and the number of available rooms, in the reference period.

Hotels and similar – Includes hotels, apartment hotels, “*pousadas*”, “*quintas da Madeira*”, tourist apartments and tourist villages.

Local accommodation – establishments that provide temporary accommodation services for remuneration but do not meet the requirements to be considered tourism facilities, and may take the form of guest houses, apartments, lodging establishments (including hostels). **Note:** Includes pensions, motels and inns previously classified as Other tourist accommodation. Only local accommodation establishments with 10 or more beds are considered according to the statistical threshold set in EU Regulation 692/2011. Local accommodation establishments of RA Açores are not included due to unavailability of results according to the harmonized methodology applied in the Survey on guest stays and other hotel data.

Rural tourism – establishments that provide accommodation services to tourists in rural areas, providing an adequate set of facilities, structures, equipment and complementary services, preserving and enhancing the architectural, historical, natural legacies of the respective region.

Lodging tourism – establishments of a family nature, located in private real estate, namely palaces and mansions, depending on their architectural, historical or artistic value, both in rural or urban areas.

Quinta da Madeira – establishment located in one or more preexisting buildings, with characteristics and architectural, patrimonial and cultural value alluding to the historical past of Madeira.

Camp sites – A collective, fenced-off facility for tents, caravans, trailers and mobile homes.

Holiday camp – A holiday complex with appropriate facilities for providing free or low-cost holidays, usually as a social service by public or private entities.

Youth hostel – A non-profit establishment providing accommodation for young people or small groups of young people.

Year-on-year rates of change – comparison between the variable level in the reference period and the same period of the year before. The calculation of year-on-year rates of change for the main indicators is based on values in units, although in this press release they are visible only in thousands.

Year-on-year variation (p.p.) – comparison between the variable level in the reference period and the same period of the year before presented as a difference in percentage points.

Rounded figures may imply that totals might not correspond to the sum of the parcels.

Language - In order to simplify the language, the term “foreigner” might be used instead of “non resident”.

ABBREVIATIONS

RevPAR – Revenue per Available Room

Date of next press release: 15 July 2019