

17 June 2013

Tourism activity

April 2013

Tourism activity with reductions in guests, overnight stays and revenue

The number of overnight stays in tourism accommodation establishments reached 3.1 million in April 2013 (4.0% less than in April 2012). Residents decreased their number of overnight stays by 11.6%, while non residents recorded a slight decline (-1.0%), reversing the trend of recent months.

Revenue had slight decreases in April (-1.4% in total revenue and -1.0% in revenue from accommodation).

These figures were influenced by calendar effect of the Easter (celebrated in March 2013 while in April during 2012) yet contradicted by the accumulated results of January to April, with overall positive year-on-year change rates (+2.4% in overnight stays, +1.9% in total revenue and +2.8% in revenue from accommodation).

Table 1. Global preliminary results from tourism activity

GLOBAL PRELIMINARY RESULTS	Month		Accumulated	
	Apr 13	Year-on-year change rate (%)	Jan to Apr 13	Year-on-year change rate (%)
Guests (thousand)	1 147.8	-3.4	3 533.7	1.0
Overnight stays (thousand)	3 107.3	-4.0	9 409.0	2.4
Residents in Portugal	798.8	-11.6	2 748.0	-6.4
Non residents	2 308.5	-1.0	6 660.9	6.5
Average stay (no. of nights)	2.7	0.0	2.7	0.1
Net bed occupancy rate (%)	36.5	-2.4 p.p.	29.6	0.4 p.p.
Total revenue (€ Million)	141.8	-1.4	417.7	1.9
Revenue from accommodation (€ Million)	96.7	-1.0	280.0	2.8
RevPar (Average revenue per available room) (€)	25.2	-3.1	19.4	2.0

Number of guests and overnight stays decreased

In April 2013, the trend in year-on-year terms was influenced by the Easter effect that contributed for the decline in results.

Tourism accommodation establishments hosted 1.1 million guests, which in turn originated 3.1 million overnight stays. These figures stood for year-on-year declines of 3.4% (+9.5% in March) and 4.0% (+14.0% in March), respectively.

Tourism activity – April 2013

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Concerning the period January to April, the trend was slightly positive (+1.0% in guests and +2.4% in overnight stays when compared with the same period in 2012).

In April 2013, the emphasis went to tourist apartments with an 8.3% growth in year-on-year terms, yet below the one resulting from the overall results of the first four months of the year (+15.4%).

Overnight stays in hotels decreased by 4.6% when compared with April 2012, a declining performance mostly due to the contribution of 4 and 3 star categories, since the remaining recorded a positive trend, namely 5 star hotels (+6.9% in overnight stays when compared with April 2012).

The overall results of January to April revealed a 3.0% growth in overnight stays spent in hotels.

In apartment hotels (-3.5%), all categories declined in April, more so the 5 star category (-10.8%).

The overall results from the months of 2013 were similar.

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

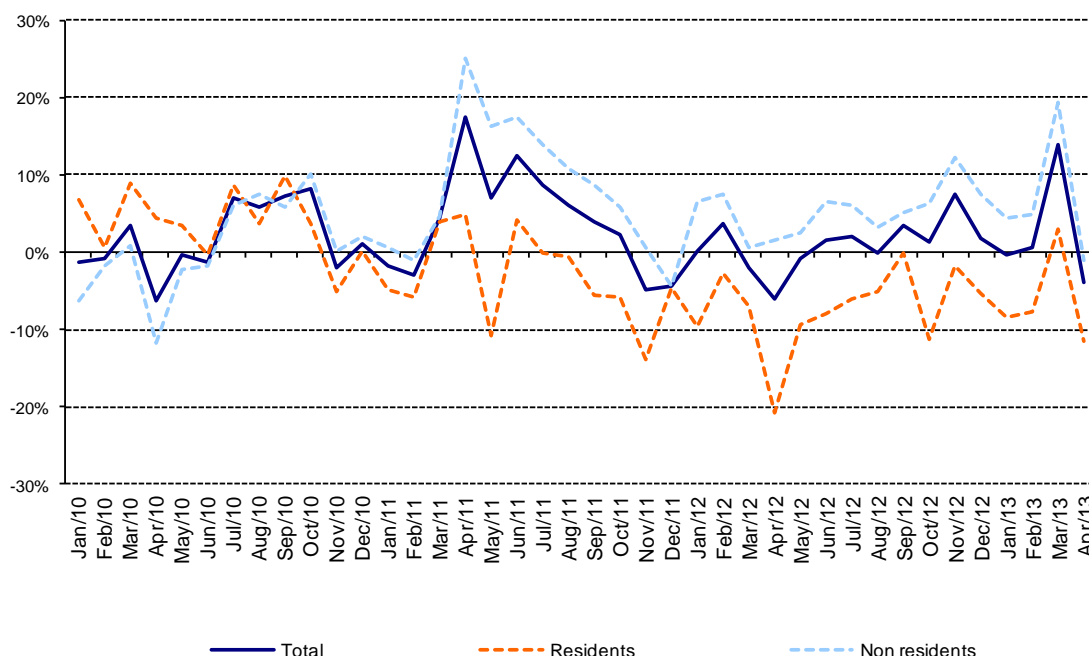
Type of establishment and category	Overnight stays (10 ³)		Year-on-year change rate
	Apr-12	Apr-13	%
Total	3 235.6	3 107.3	-4.0
Hotels	2 105.7	2 008.6	-4.6
*****	349.2	373.4	6.9
****	1 063.0	984.1	-7.4
***	501.8	459.0	-8.5
** / *	191.7	192.1	0.2
Apartment hotels	509.7	491.7	-3.5
*****	39.9	35.6	-10.8
****	350.5	341.9	-2.4
*** / **	119.3	114.2	-4.3
Pousadas	28.1	24.0	-14.7
Tourist apartments	243.3	263.5	8.3
Tourist villages	112.2	109.6	-2.3
Other tourist establishments	236.6	209.9	-11.3

Slight decrease in overnight stays spent by non residents

Residents abroad spent 2.3 million overnight stays in April 2013, slightly below the value of April 2012 (-1.0%). This outcome reverses the trend of the most recent months (+4.3% in January, +4.9% in February and +19.3% in March).

In April, residents in Portugal spent 798.8 thousand overnight stays, which stood for an year-on-year decrease of 11.6%, a lot steeper than the one resulting from the accumulated results of January to April (-6.4%).

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



The eight main inbound markets of origin concentrated 71.1% of overnight stays spent by non residents and accounted for distinct trends.

The British market, ranking first (23.3% of overnight stays spent by non residents in April), presented an expressive growth in year-on-year terms (13.3%), in line with the one of the previous month (+15.6%).

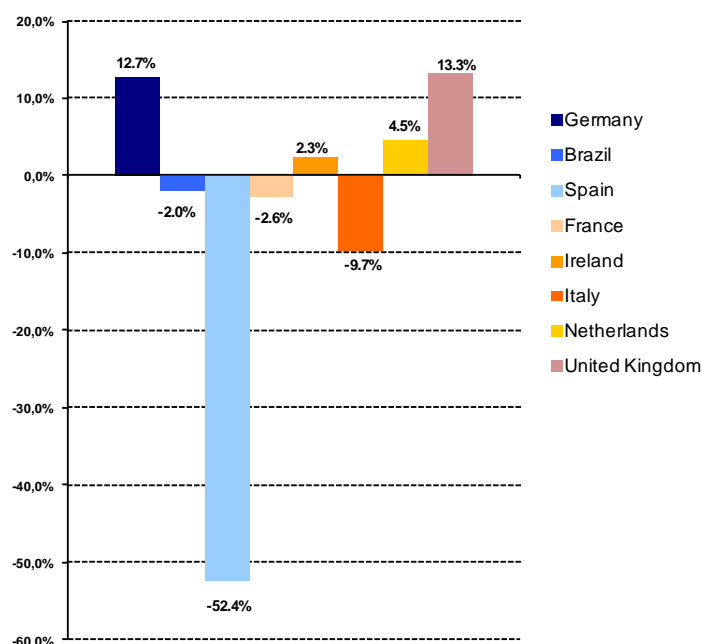
The German market, representing 15.5% in April, also performed positively (year-on-year change rate of +12.7% in overnight stays), as well as the Dutch market (weighting 6.3%, corresponding to 4.5% more in April 2013). On the contrary, the French market (9.1% share), decreased by 2.6% when compared with April 2012.

The Spanish market (6.8% of overnight stays), the most sensitive to the Easter effect, stood for a sharp decline in year-on-year terms in April (-52.4%), reversing the performance of the previous month (+69.0%). The overall results of January to April showed nevertheless a decrease in the number of overnight stays (-13.9%).

The Brazilian market (3.9% of overnight stays spent by non residents in April) recorded a 2.0% decrease in year-on-year terms, contradicting the successive increases occurred in the 2013 months (+6.4% from January to April).

The Irish market (holding 3.1% of overnight stays spent by non residents) presented a 2.3% growth in overnight stays in April, following the 32.0% year-on-year growth in March, leading to an year-on-year change rate (January to April) of +12.0%.

Figure 2. Overnight stays by main inbound markets ⁽¹⁾ – month-to-month change rate – April 2013



(1) 2012 Main Inbound Markets

When considering the regional breakdown of the total of overnight stays, only the Azores presented a positive trend, although a slight one (+0.6%). Madeira decreased by 2.4%, while in the Mainland the declining results had a greater expression in the Centre (-14.7%) and in Algarve (-4.3%).

In terms of the overall year-on-year change rate (January to April), both Lisbon and Madeira had 4.4% increases in the number of overnight stays, as well as in Algarve (+2.5%) and in the North (+1.9%). The remaining regions decreased their results, more so the Alentejo (-5.4%).

In April, overnight stays spent by residents increased in Lisbon only (4.5% more than in April 2012) which also stood as the main destination (24.8% of the total). In the remaining regions there were declines, more so in Madeira and Algarve.

As far as non residents are concerned, the demand for the region of Alentejo increased quite significantly (+30.5% in overnight stays when compared with April 2012), with Azores also growing as a destination (+9.4%).

On the contrary, in the North, Centre and Lisbon regions, there were declines in the number of overnight stays spent by non residents, when compared with the same month of the previous year.

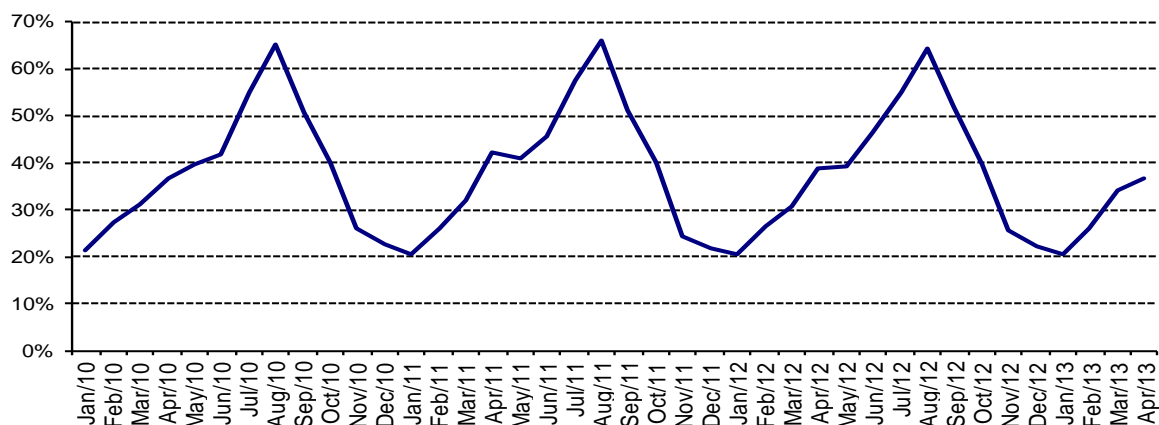
Table 3. Overnight stays by region (NUTS II)

NUTS II	Overnight stays (10 ³)		Year-on-year change rate	Residents overnight stays (10 ³)		Year-on-year change rate	Non residents overnight stays (10 ³)		Year-on-year change rate
	Apr-12	Apr-13	%	Apr-12	Apr-13	%	Apr-12	Apr-13	%
Portugal	3 235.6	3 107.3	-4.0	903.5	798.8	-11.6	2 332.1	2 308.5	-1.0
North	370.5	356.5	-3.8	180.1	168.5	-6.5	190.4	188.0	-1.3
Centre	311.7	266.0	-14.7	175.0	149.4	-14.6	136.7	116.5	-14.8
Lisbon	852.9	843.4	-1.1	189.9	198.3	4.5	663.0	645.1	-2.7
Alentejo	87.5	85.1	-2.7	62.8	52.9	-15.8	24.7	32.2	30.5
Algarve	1 029.4	984.7	-4.3	208.5	161.3	-22.6	820.9	823.3	0.3
Azores	75.5	75.9	0.6	33.5	30.0	-10.4	42.0	45.9	9.4
Madeira	508.1	495.8	-2.4	53.6	38.3	-28.5	454.5	457.5	0.7

Net bed occupancy rates declined

In April 2013, the net bed occupancy rate in tourism accommodation establishments was 36.5%, below the one of April 2012 (38.9%).

Figure 3. Net bed occupancy rate



As in the previous month, Madeira presented the highest net bed occupancy rates (59.3% in April), followed by Lisbon (50.5%). In year-on-year terms, there was an almost overall decline as far as this indicator is concerned, more so in the Centre (-4.1 p.p.) and in Algarve (-3.4 p.p.).

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

NUTS II	Occupancy rate		Average stay	
	%		(No. of nights)	
	Apr-12	Apr-13	Apr-12	Apr-13
Portugal	38.9	36.5	2.7	2.7
North	31.4	29.2	1.7	1.7
Centre	26.6	22.5	1.8	1.7
Lisbon	51.5	50.5	2.3	2.3
Alentejo	24.0	24.1	1.6	1.7
Algarve	36.3	32.9	4.1	4.1
Azores	29.9	29.8	3.0	3.0
Madeira	59.7	59.3	5.0	5.1

Considering the type of establishment, there was an overall decline in net bed occupancy rates. Concerning the category of the tourist accommodation establishments, the declines were stronger in 5 star apartment hotels (-8.9 p.p.), “pousadas” (-8.4 p.p.) and in 3 star hotels (-6.9 p.p.).

5 and 4 star hotels presented the highest values for this indicator (44.7% and 44.6%, respectively), followed by 4 star apartment hotels (42.4%).

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)	
	Apr-12	Apr-13	Apr-12	Apr-13
Total	38.9	36.5	2.7	2.7
Hotels	43.7	40.5	2.4	2.4
*****	46.1	44.7	2.7	2.7
****	48.4	44.6	2.6	2.6
***	39.1	32.2	2.2	2.1
** / *	32.9	31.2	1.8	1.8
Apartment hotels	42.4	40.9	3.9	3.9
*****	47.6	38.7	4.1	4.0
****	44.1	42.4	3.8	3.8
*** / **	36.7	37.4	4.0	4.0
Pousadas	34.9	26.5	1.6	1.7
Tourist apartments	27.1	26.3	4.9	5.0
Tourist villages	24.6	23.0	4.6	4.7
Other tourist establishments	27.5	27.2	2.3	2.3

Average stay with stable results

In April, the average stay was 2.7 nights, the same as in April 2012 and slightly below the one of March 2013 (2.8).

As usual, the longest stays were spent in Madeira (5.1 nights) and Algarve (4.1 nights).

Tourist apartments and tourist villages presented, on average, the longest stays (5.0 and 4.7 nights, respectively), followed by 5 and 3/2 star apartment hotels (4.0 nights).

In year-on-year terms, there were no major changes as far as this indicator is concerned when analysing regional values and the typology of the establishments.

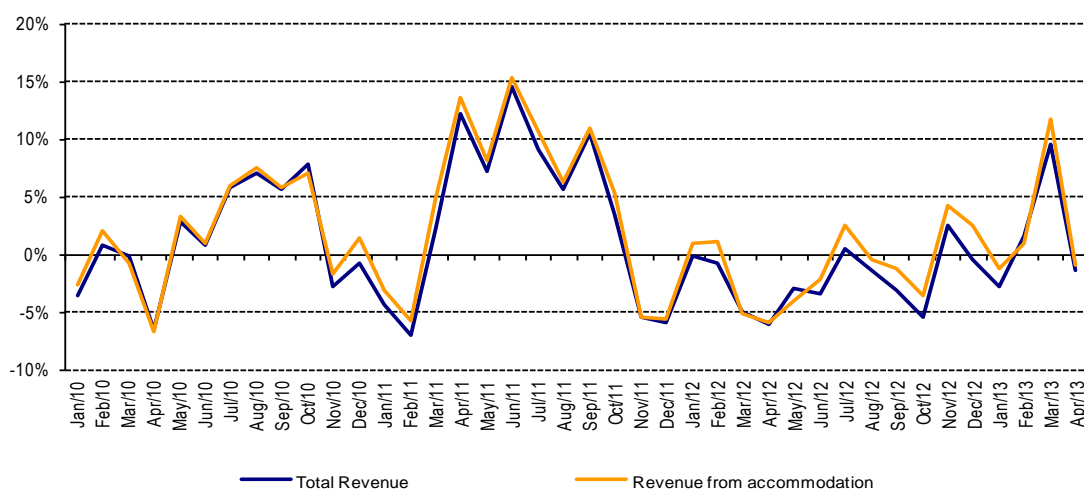
Slight decline in revenue

In April 2013, tourist accommodation establishments accounted for EUR 141.8 million in total revenue and EUR 96.7 million in revenue from accommodation. These results correspond to year-on-year decreases of 1.4% and 1.0%, respectively, with the change rate of the revenue from accommodation on a par with the change rate observed in overnight stays spent by non residents (also at -1.0%), but more moderate than the change rate of the total of overnight stays (-4.0%).

The revenue from accommodation stood for 68.2% of the total revenue in April 2013, while in the same month of 2012 its weight stood at 67.9%.

When considering the overall values of January to April 2013, the results from revenue revealed year-on-year change rates of +1.9% in total revenue and +2.8% in revenue from accommodation.

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



In April 2013, the North and Lisbon regions presented positive year-on-year change rates in both revenue indicators. The Centre region was the most affected by the reduction in revenue (-16.4% in total revenue and -14.1% in revenue from accommodation), a decline also affecting the Alentejo but in a far smaller scale.

Table 5. Revenue by region (NUTS II)

NUTS II	Total revenue (10 ⁶ euros)		Revenue from accommodation	
	Apr-13	Year-on-year change rate (%)	Apr-13	Year-on-year change rate (%)
Portugal	141.8	-1.4	96.7	-1.0
North	16.7	0.7	11.9	1.2
Centre	11.1	-16.4	7.4	-14.1
Lisbon	48.6	2.1	34.9	0.6
Alentejo	4.0	-5.3	2.7	-5.9
Algarve	34.7	-1.8	22.9	0.8
Azores	2.9	-2.5	2.1	0.2
Madeira	23.8	-0.2	14.9	-0.8

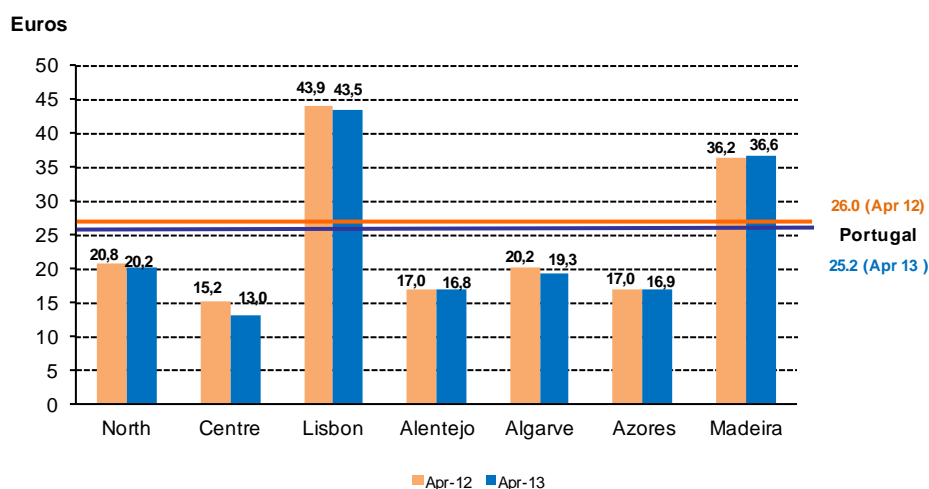
RevPAR decreased in April but increased in the period January to April

In April 2013, RevPAR (revenue per available room) from tourist accommodation activity was EUR 25.2, lower by 3.1% when compared with April 2012.

However, as in revenue, the RevPAR for the first four months of the year increased slightly (+2.0%), and stood at EUR 19.4.

On a regional basis, only Madeira recorded a rise on RevPAR, but barely so.

Figure 5. Average revenue per available room



As usual, 5 star hotels recorded the highest RevPAR (EUR 56.4), twice as much as the value of the same category of apartment hotels, followed by the “*pousadas*” (EUR 32.7) and by 4 star hotels (EUR 30.2).

When compared with April 2012, the RevPAR declined in almost all typologies and categories, more so in 2/1 star hotels (-18.8%) and in 5 star apartment hotels (-18.0%).

The emphasis went to tourist villages which presented a growth (+11.3%), with also slight increases in RevPAR from three and two star apartment hotels (+1.7%) and five star hotels (+1.4%).

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

Type of establishment and category	RevPAR (€)		Year-on-year change rate
	Apr-12	Apr-13	%
Total	26.0	25.2	-3.1
Hotels	31.1	30.0	-3.5
*****	55.6	56.4	1.4
****	31.3	30.2	-3.5
***	21.4	18.9	-11.7
** / *	19.7	16.0	-18.8
Apartment hotels	23.2	22.7	-2.2
*****	30.0	24.6	-18.0
****	24.6	24.3	-1.2
*** / **	17.6	17.9	1.7
Pousadas	38.7	32.7	-15.5
Tourist apartments	10.8	10.2	-5.6
Tourist villages	16.0	17.8	11.3
Other tourist establishments	16.1	15.7	-2.5

Camping sites and holiday camps

In April 2013, the camping sites hosted 70.8 thousand campers, close to the number of campers hosted in April 2012 (-0.9%).

The number of overnight stays decreased sharply (-18.3%), corresponding to a total of 202.4 thousand during the month of April. However, this decline was less expressive than in the previous month (-28.7%).

Residents represented 58.6% of the total of overnight stays and accounted for a 23.4% decrease when compared with April 2012.

Non residents also presented a declining trend, but quite less so (-9.8%).

The small variation on the number of campers, associated to the decline in the total of overnight stays, led to a reduction on the average stay which stood at 2.9 nights, when in April 2012 that figure was 3.5 nights.

In the period January to April 2013, overnight stays spent in camping sites totalled 657.1 thousand, corresponding to a significant year-on-year decline (-23.8%).

Holiday camps and youth hostels also presented declining results in April 2013.

The number of guests ascended to 26.6 thousand with a corresponding 53.5 thousand overnight stays. These figures stood for year-on-year declines of 5.2% and 9.9%, respectively.

For these declining results residents contributed mostly (71.0% of the total of overnight stays), with reduced demand for this type of establishment, which translated into a 13.8% reduction in overnight stays when compared with April 2012.

Non residents accounted for a slight year-on-year increase (+1.2%).

The average stay was 2.0 nights (2.1 nights in April 2012).

When considering the period January to April, holiday camps and youth hostels recorded 161.5 thousand overnight stays, 17.0% less than in the same period of 2012.

Table 8. Camping, holiday camps and youth hostels, by origin of the guests, April 2013

	Unit	Camping sites			Holiday Camps and Youth Hostels		
		Total	Residents	Non residents	Total	Residents	Non residents
Campers / Guests	10 ³	70,8	42,5	28,3	26,6	19,1	7,6
Overnight stays	10 ³	202,4	118,6	83,8	53,5	38,0	15,5
Average stay	nights	2,9	2,8	3,0	2,0	2,0	2,0

MAIN INBOUND MARKETS IN 2012

The Spanish market

The Spanish market stood for 11.3% of overnight stays spent by non residents in 2012, ranking 3rd as the most relevant country after the United Kingdom (23.5%) and Germany (13.6%).

The evolution of the Spanish market has been globally positive since 2005. Overnight stays resulting from the Spanish market grew especially until 2007, having slowed the pace in subsequent years.

In 2012 there was a reduction of 10.5% in overnight stays from the Spanish market, reaching a level close to the year 2008, one of the less favourable ones concerning this inbound market.

In 2012 tourism accommodation establishments hosted 1.2 million Spanish resident guests (-11.6%), which in turn spent 3.1 million overnight stays.

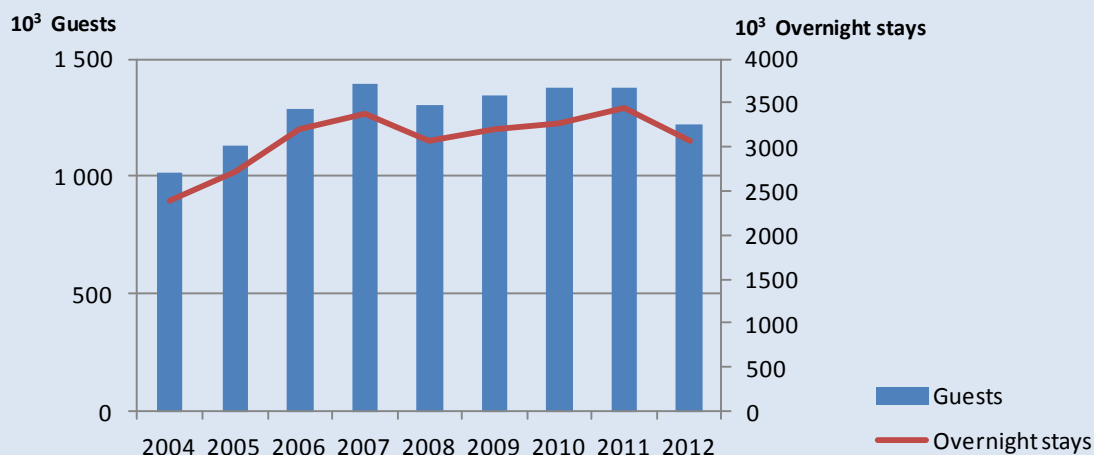
The main destinations were Lisbon (34.8% of overnight stays spent by Spanish residents), Algarve (23.5%) and the North (16.8%). However, the longest stays were in Madeira (5.1 nights) and Azores (3.8 nights).

The most sought-after establishments were hotels, with a corresponding 72.7% share of the total of overnight stays of this market, followed by apartment hotels (11.5%). In hotels, almost half of the overnight stays (47.5%) were spent in 4 star units, followed by 3 star units (28.4%).

The average stays by type and category of establishments reached the highest values in 5 star apartment hotels (4.0 nights) and in tourist apartments (3.6 nights).

The summer months recorded the highest demand (August concentrated 23.5% of overnight stays spent by Spaniards, July with 15.0%), but April, the month of Easter in 2012, also had a good performance (10.8%).

Evolution of guests and overnight stays from the Spanish market



EXPLANATORY NOTES

Data disseminated in this “Press Release” refers to the following data outputs:

2013 – March and April – preliminary data; January and February – provisional data.

2012 – January to December – provisional data

Data refers to tourism accommodation establishments in operation, in each reference period.

In between preliminary, provisional and definitive data, results are revised due to definitive answers instead of provisional and mainly due to the replacement of non response estimates by effective responses, including situations of temporary suspended activity not duly reported. 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	Total revenue	Revenue from accommodation
Jan-13	-1.4	-1.1	-1.1
Feb-13	-0.5	0.0	0.2

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 revenues from accommodation and the number of available rooms, in the reference period.

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 making establishment providing accommodation for young people or limited groups of young people.

Year-on-year change rates – comparison between the variable level in the reference period and the same period of the year before. 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.

Rounded figures might imply that totals don’t correspond to the sum of the parcels.

ABBREVIATIONS

RevPAR – Revenue per Available Room

Date of next press release: 15 July 2013