

15 January 2019

Tourism Activity
November 2018

Overnight stays of non residents resumed growth

Hotels and similar establishments registered 1.3 million guests and 3.3 million overnight stays in November 2018, corresponding to year-on-year change rates¹ of +6.3% and +4.6%, respectively (+0.7% and 0.0% in October, in the same order). Overnight stays of residents kept accelerating and grew by 10.9% (+9.6% in October). Overnight stays of non residents grew once again in November (+2.2%, -2.7% in October), after declining for seven months.

In November, the average stay (2.48 nights) declined by 1.6% (+2.0% as regards residents and -2.2% in the case of non residents).

The net bed occupancy rate (37.6%) increased by 0.5 p.p. in November (-0.5 p.p. in the preceding month).

Total revenue accelerated and grew by 6.3% (+2.8% in October) and stood at EUR 189.3 million. Revenue from accommodation grew by 6.1% (+2.1% in October) and ascended to EUR 134.3 million.

Figure 1. Global preliminary results

	Unit	October 2018		November 2018		Jan - Nov 18	
		Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)
Guests	10³	1 994.5	0.7	1 322.8	6.3	19 827.5	1.6
Residents in Portugal	"	698.2	5.8	554.9	8.8	7 661.8	3.9
Residents abroad	"	1 296.3	-1.8	767.8	4.5	12 165.7	0.2
Overnight stays	10³	5 383.9	0.0	3 281.4	4.6	54 795.1	-0.2
Residents in Portugal	"	1 299.9	9.6	955.2	10.9	15 671.5	5.3
Residents abroad	"	4 084.0	-2.7	2 326.3	2.2	39 123.6	-2.2
Average stay	no. of nights	2.70	-0.7	2.48	-1.6	2.76	-1.8
Residents in Portugal	"	1.86	3.6	1.72	2.0	2.05	1.3
Residents abroad	"	3.15	-0.9	3.03	-2.2	3.22	-2.4
Net bed occupancy rate	%	54.0	-0.5 p.p.	37.6	0.5 p.p.	52.8	-1.0 p.p.
Total revenue	EUR 10 ⁶	332.8	2.8	189.3	6.3	3 431.4	6.0
Revenue from accommodation	"	240.6	2.1	134.3	6.1	2 539.3	6.5
RevPAR (Average revenue per available room)	EUR	54.0	1.1	33.7	2.7	54.5	4.7

Overnight stays on the rise

In November 2018, hotels and similar establishments hosted 1.3 million guests who spent 3.3 million overnight stays, reflecting change rates of +6.3% and +4.6% (+0.7% and 0.0% respectively, in October).

In the first eleven months of 2018, the number of guests increased by 1.6% and overnight stays declined by 0.2%.

¹ Unless stated otherwise, the change rates presented in this press release correspond to year-on-year change rates.

Overnight stays spent in hotels (76.1% of the total) grew by 6.3%. Tourist villages and tourist apartments stood out with increases of 13.3% and 11.4% respectively.

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

Unit: 10³

Type of establishment and category	Overnight stays			Year-on-year change rates (%)	
	Nov-17	Nov 18	Jan - Nov 18	Nov 18	Jan - Nov 18
Total	3 137.7	3 281.4	54 795.1	4.6	- 0.2
Hotels	2 349.0	2 496.0	38 262.6	6.3	1.3
*****	425.0	447.8	7 271.2	5.4	2.1
****	1 145.5	1 214.7	18 819.6	6.0	1.7
***	530.6	568.8	8 469.5	7.2	- 0.2
** / *	247.9	264.7	3 702.2	6.8	1.0
Apartment hotels	370.4	373.0	7 257.7	0.7	- 2.6
*****	25.7	29.7	485.9	15.8	- 1.3
****	279.5	281.1	5 319.3	0.6	- 2.0
*** / **	65.3	62.2	1 452.5	-4.7	- 5.1
Pousadas	32.9	35.4	557.4	7.6	0.7
Tourist apartments	153.1	170.5	4 658.8	11.4	1.1
Tourist villages	93.7	106.2	2 490.6	13.3	0.1
Other tourist establishments	138.7	100.4	1 568.1	-27.6	- 22.0

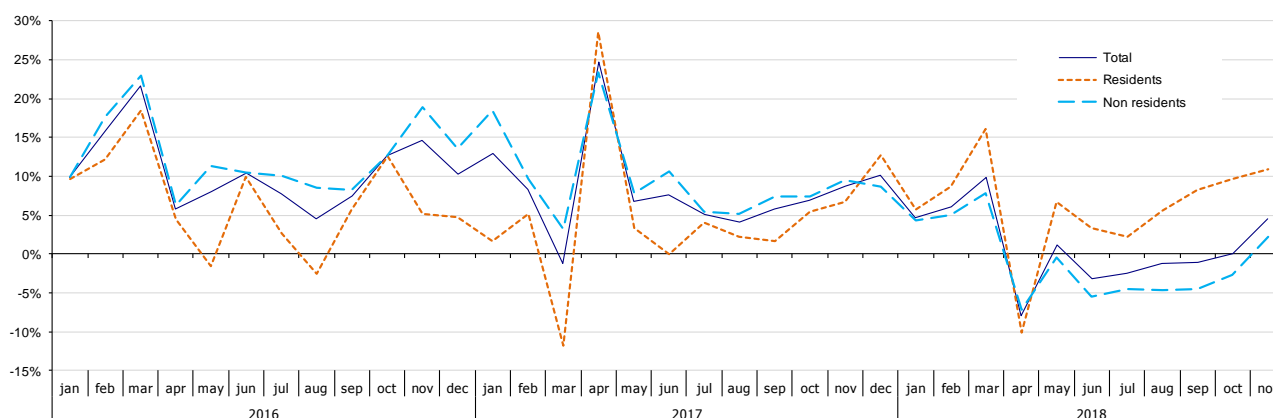
The internal market kept accelerating

In November, the internal market contributed with 955.2 thousand overnight stays, accelerating to a 10.9% growth (+9.6% in October).

The external markets resumed growth in November, after decreasing for seven months (+2.2% in November from -2.7% in the preceding month) and corresponded to 2.3 million overnight stays.

In the first eleven months of 2018, overnight stays of residents increased by 5.3% while those of non residents declined by 2.2%.

Figure 3. Overnight stays - Year-on-year change rates



The British market resumed growth

The fifteen main inbound markets² represented 83.3% of total overnight stays of non residents in November.

The British market (17.2% of the total overnight stays of non residents) grew by 7.6% in November, interrupting the decline trend that started in October 2017. Since the beginning of the year, this market declined by 8.0%.

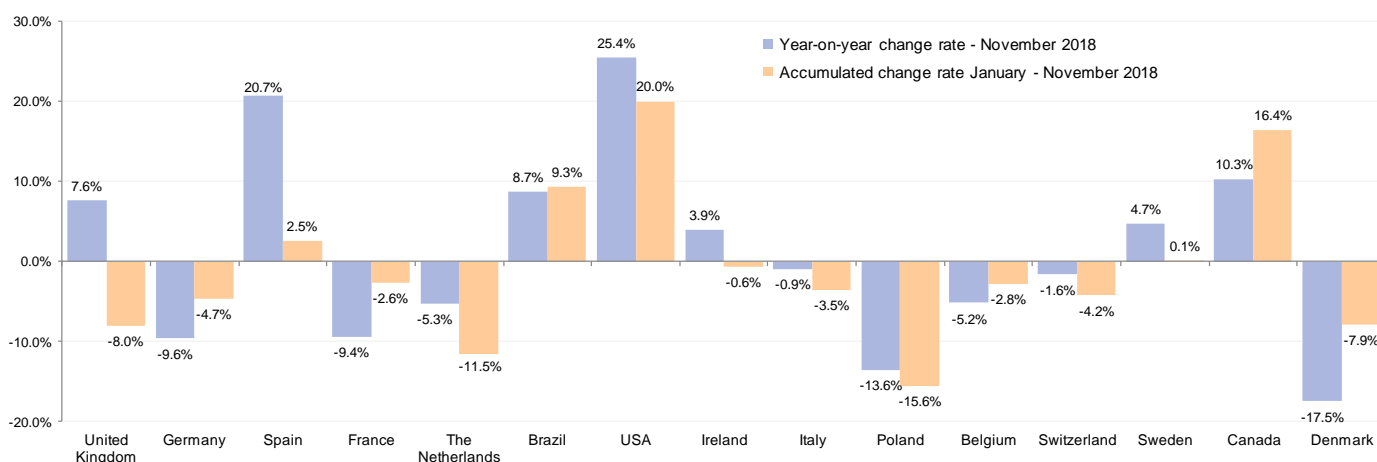
Overnight stays spent by German guests (14.8% of the total) declined by 9.6%. In the first eleven months of the year, this market had a 4.7% reduction.

The Spanish market (10.2% of the total) had increases of 20.7% in November and 2.5% since the beginning of the year.

The French market (7.0% of the total) presented declines of 9.4% in November and 2.6% in the first eleven months of the year.

In November, besides Spain, the emphasis went to the increases recorded in the North American (+25.4%) and in the Canadian markets (+10.3%). In the first eleven months of the year, these same markets also stood out (+20.0% and +16.4%, respectively).

Figure 4. Overnight stays by main inbound markets: year-on-year change rates



² Based on the results of overnight stays in 2017.

Increase in overnight stays in most regions

In November, all mainland regions as well as the AR Açores recorded increases in overnight stays, with the emphasis on the increases recorded in the Norte (+12.8%) and in Alentejo (+11.6%). The number of overnight stays increased by 143.7 thousand in this month (compared with the same month of the previous year) of which 42.1% in the Norte (60.6 thousand additional overnight stays) and 29.7% in Algarve (42.7 thousand overnight stays added).

In the first eleven months of the current year, the emphasis went to the increase of 5.5% in the Norte (a region with a 13.5% weight considering the total accumulated overnight stays) and to the 3.7% increase in Alentejo (3.2% share in the same period).

As regards overnight stays of residents, in November, there were increases in all regions with the emphasis on those recorded in AR Açores (+23.5%) and in AR Madeira (+17.4%). In the period from January to November, in what concerns residents, the increases in the Algarve (+10.2%), AR Açores (+5.5%) and Centro (+5.4%) were noteworthy.

In November, as far as overnight stays of non residents are concerned, the increases recorded in Alentejo (+29.0%) and in the Norte (+12.4%) stood out. The largest decreases occurred in AR Açores (-7.7%) and AR Madeira (-4.8%). Since the beginning of the year, concerning overnight stays of non residents, the emphasis went to the increases recorded in Alentejo (+7.5%) and in Norte (+6.1%) and, conversely, to the decreases in the Centro (-11.9%) and in Algarve (-4.3%).

Figure 5. Overnight stays by region NUTS II

Unit: 10³

NUTS II	Total of overnight stays				Overnight stays from residents				Overnight stays from non residents			
	Nov 18		Jan - Nov 18		Nov 18		Jan - Nov 18		Nov 18		Jan - Nov 18	
	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	3 281.4	4.6	54 795.1	-0.2	955.2	10.9	15 671.5	5.3	2 326.3	2.2	39 123.6	-2.2
Norte	533.3	12.8	7 378.2	5.5	243.9	13.4	3 062.7	4.6	289.3	12.4	4 315.5	6.1
Centro	332.9	6.5	5 205.8	-3.3	194.6	13.2	2 820.8	5.4	138.3	-1.7	2 384.9	-11.9
MA Lisboa	1 022.9	1.8	13 609.7	1.0	237.6	5.1	2 936.6	2.5	785.3	0.9	10 673.1	0.6
Alentejo	109.0	11.6	1 764.0	3.7	69.9	3.7	1 105.8	1.6	39.1	29.0	658.2	7.5
Algarve	687.4	6.6	18 293.0	-1.3	111.2	11.9	4 248.3	10.2	576.1	5.7	14 044.7	-4.3
AR Açores	88.3	8.6	1 728.4	0.5	52.6	23.5	750.3	5.5	35.8	- 7.7	978.1	-3.0
AR Madeira	507.6	-3.1	6 816.1	-3.8	45.3	17.4	747.1	-1.1	462.3	- 4.8	6 069.0	-4.1

Non-residents behind the reduction in average stay

The average stay (2.48 nights) decreased by 1.6% due to a reduction in the average stays of non residents (-2.2%), while in the case of residents the average stay increased (+2.0%). The Alentejo, Norte and Algarve had increases in the average stays (+5.8%, +1.8% and +0.8%, respectively) with the largest reductions having occurred in AR Açores and AR Madeira (-4.9% in both). The highest values concerning this indicator were recorded in AR Madeira (5.15 nights) and in Algarve (4.23 nights).

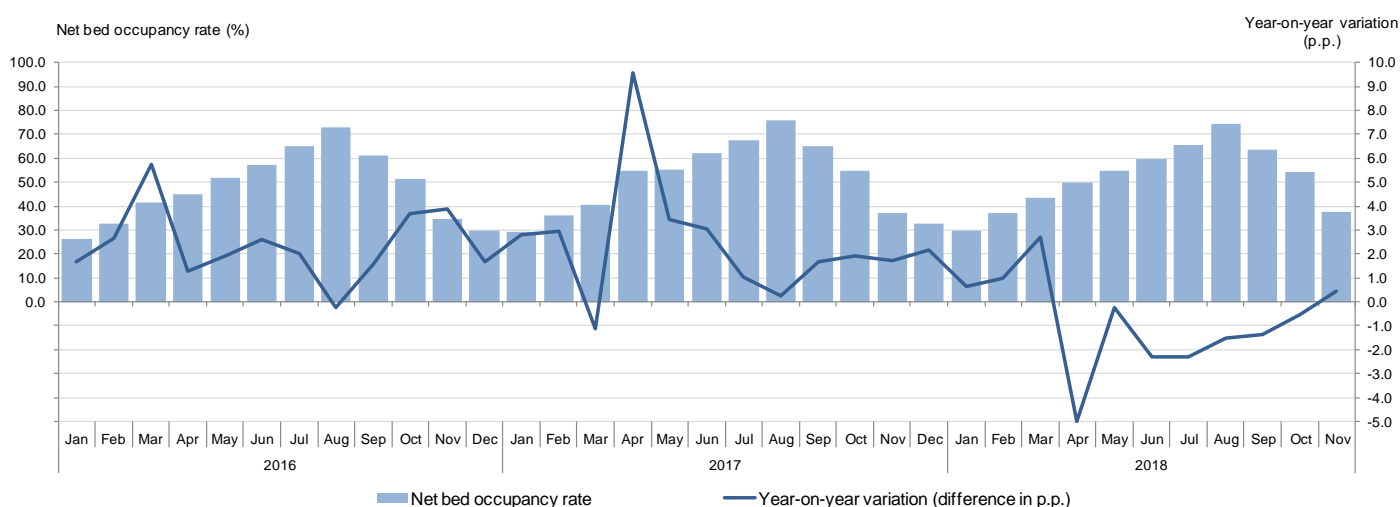
Figure 6. Average stay and net bed occupancy rate by region NUTS II

NUTS II	Average stay			Occupancy rate		
	No. of nights		Y-o-y change rate (%)	%		Y-o-y variation (p.p.)
	Nov-17	Nov 18		Nov-17	Nov 18	
Portugal	2.52	2.48	-1.6	37.1	37.6	0.5
Norte	1.72	1.75	1.8	35.7	38.7	3.0
Centro	1.69	1.67	-1.5	25.7	27.2	1.5
MA Lisboa	2.26	2.22	-1.5	51.3	50.5	-0.8
Alentejo	1.59	1.68	5.8	24.6	28.9	4.2
Algarve	4.20	4.23	0.8	26.8	27.2	0.3
AR Açores	2.84	2.70	-4.9	27.5	28.3	0.8
AR Madeira	5.41	5.15	-4.9	61.3	57.8	-3.6

Increase in the occupancy rate

The net bed occupancy rate (37.6%) increased by 0.5 p.p. in November (-0.5 p.p. in October). The largest increases in the occupancy rate were recorded in Alentejo (+4.2 p.p.) and in Norte (+3.0 p.p.), while the largest decrease occurred in AR Madeira (-3.6 p.p.). The highest occupancy rates came from AR Madeira (57.8%) and MA Lisboa (50.5%).

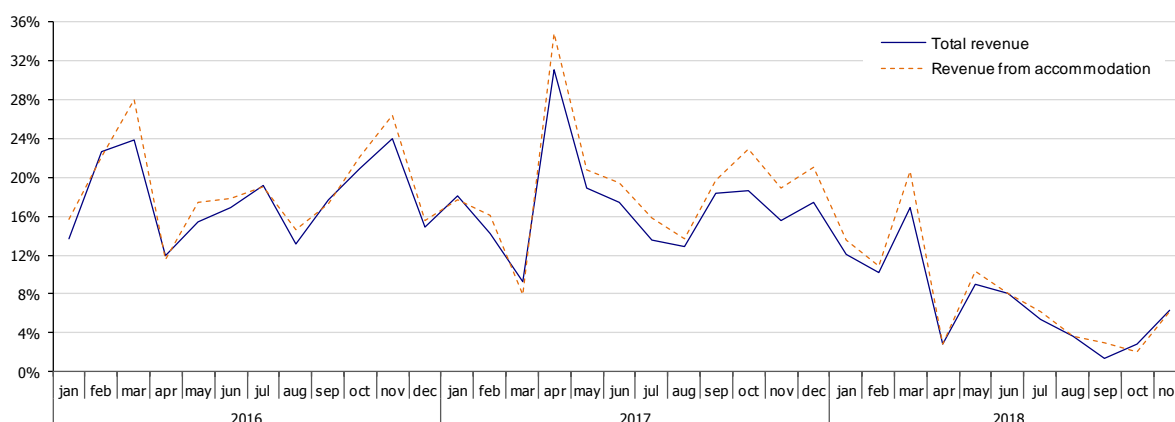
Figure 7. Net bed occupancy rate



Acceleration in revenue

Total revenue amounted to EUR 189.3 million and revenue from accommodation stood at EUR 134.3 million in November, accelerating to increases of 6.3% and 6.1%, respectively (+2.8% and +2.1% in October, in the same order).

Figure 8. Total revenue and revenue from accommodation - Year-on-year change rates



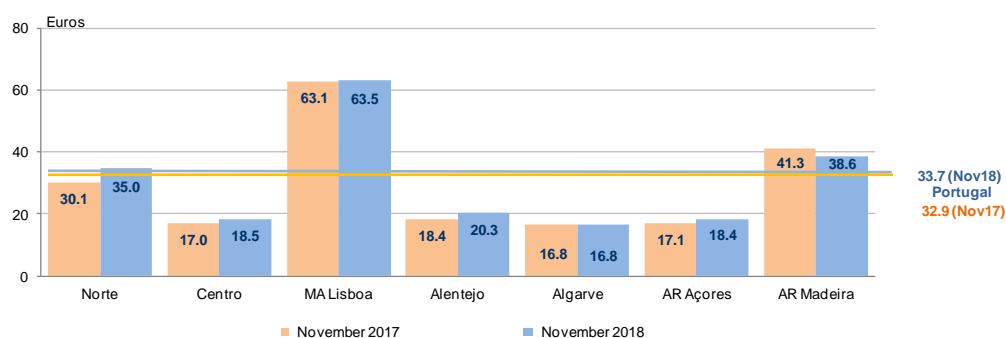
Amongst the various regions, the emphasis went to the increases in revenue in the Norte (+19.4% in total revenue and +21.1% in revenue from accommodation) and in AR Açores (+10.6% and +12.7%, respectively).

Figure 9. Revenue by region NUTS II

NUTS II	Total revenue			Revenue from accommodation		
	EUR 10 ⁶		Y-o-y change rate (%)	EUR 10 ⁶		Y-o-y change rate (%)
	Nov-17	Nov 18		Nov-17	Nov 18	
Portugal	178.0	189.3	6.3	126.5	134.3	6.1
Norte	25.8	30.8	19.4	19.1	23.1	21.1
Centro	14.9	16.1	7.6	9.9	10.8	9.2
MA Lisboa	76.6	79.4	3.6	58.4	60.3	3.2
Alentejo	5.2	5.4	4.2	3.3	3.6	9.3
Algarve	25.8	27.8	7.8	16.4	17.4	6.0
AR Açores	3.5	3.9	10.6	2.4	2.7	12.7
AR Madeira	26.2	25.9	-1.1	16.9	16.3	-3.8

The average revenue per available room (RevPAR) was EUR 33.7 in November, which corresponded to an increase of 2.7% (+1.1% in October). MA Lisboa accounted for the highest RevPAR (EUR 63.5). As regards this indicator, the emphasis went to the increases in the Norte (+16.2%) and in Alentejo (+10.4%).

Figure 10. Average revenue per available room



In November, the evolution of RevPAR was mostly positive concerning the different typologies and categories. The emphasis was on the increases occurred in tourist villages (+13.2%) and in "pousadas" (+10.2%). "Pousadas" and hotels recorded the highest values in this indicator (EUR 45.4 and EUR 38.8, respectively).

Figure 11. RevPAR by type and category of the establishment

Type of establishment and category	RevPAR (€)		Year-on-year change rate
	Nov-17	Nov 18	%
Total	32.9	33.7	2.7
Hotels	38.3	38.8	1.1
*****	65.7	65.0	-1.2
****	39.1	38.9	-0.3
***	25.7	27.4	6.5
** / *	22.2	23.5	5.6
Apartment hotels	23.9	23.9	0.2
*****	23.8	30.8	29.3
****	25.6	24.8	-2.9
*** / **	17.6	16.9	-3.6
Pousadas	41.2	45.4	10.2
Tourist apartments	12.9	13.3	3.9
Tourist villages	12.2	13.8	13.2
Other tourist establishments	21.7	24.2	11.4

Camping sites and holiday camps

In November 2018, camping sites welcomed 55.9 thousand campers (+3.1%) that spent 207.6 thousand overnight stays (+1.0%). Both the internal (+0.3%) and the external (+1.7%) markets contributed for this increase, with the latter being predominant (50.7% of the total overnight stays). The average stay (3.72 nights) decreased by 2.1%.

Holiday camps and youth hostels hosted 16.4 thousand guests (+3.2%) and 35.0 thousand overnight stays (+11.4%). The internal market concentrated 73.8% of the total overnight stays and grew by 18.9%. The external markets declined by 5.5%. The average stay (2.14 nights) increased by 7.9%.

Figure 12. Camping, holiday camps and youth hostels

	Unit	Total				Residents				Non residents			
		Nov 18		Jan - Nov 18		Nov 18		Jan - Nov 18		Nov 18		Jan - Nov 18	
		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 (%)
Camping sites													
Campers	10 ³	55.9	3.1	1 919.7	2.5	31.6	4.4	1 161.2	2.2	24.3	1.6	758.5	2.9
Overnight stays	"	207.6	1.0	6 679.2	4.9	102.4	0.3	4 316.4	5.5	105.2	1.7	2 362.8	3.7
Average stay	no. nights	3.72	-2.1	3.48	2.3	3.24	-4.0	3.72	3.2	4.33	0.1	3.12	0.8
Holiday camps and youth hostels													
Guests	10 ³	16.4	3.2	316.4	0.6	12.2	2.9	229.9	-1.3	4.2	4.2	86.5	5.9
Overnight stays	"	35.0	11.4	664.0	-0.1	25.8	18.9	472.7	-3.6	9.2	-5.5	191.3	9.7
Average stay	no. nights	2.14	7.9	2.10	-0.7	2.12	15.6	2.06	-2.3	2.18	-9.3	2.21	3.5

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 October: provisional results; 2018 – November: 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 Oct. 18	0.0 p.p.	0.0 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.

Hotel accommodation activity – Includes establishments with ten or more beds: hotels, apartment hotels, “*pousadas*”, tourist apartments and tourist villages, as well as other accommodation establishments – boarding houses, motels and inns including “*quintas da 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 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.

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: 14 February 2019