14 February 2019

Tourism Activity
December 2018

Overnight stays of residents and non residents presented distinct dynamics

Hotels and similar establishments registered 1.2 million guests and 2.8 million overnight stays in December 2018, corresponding to year-on-year change rates[1] of +3.3% and +2.5%, respectively (+6.5% and +4.7% in November, in the same order). Overnight stays of residents decelerated to a 0.5% growth (+11.3% in November). Overnight stays of non residents had a 3.6% growth (+2.3% in November).

In December, the average stay (2.30 nights) declined by 0.8% (-1.5% as regards residents and -0.9% for non residents).

The net bed occupancy rate (32.1%) decreased by 0.5 p.p. in December (+0.4 p.p. a month earlier).

Revenue accelerated with total revenue increasing by 7.3% (+6.3% in November) and stood at EUR 171.0 million. Revenue from accommodation (EUR 114.6 million) grew by 5.9% (+6.3% in November).

Figure 1. Global preliminary results on hotels and similar establishments

	Unit	November 2018		December 2018		Jan - Dec 18	
		Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)
Guests	10³	**1 326.5**	**6.5**	**1 219.9**	**3.3**	**21 051.0**	**1.7**
Residents in Portugal	"	561.2	10.0	620.5	2.0	8 288.5	3.9
Residents abroad	"	765.3	4.1	599.4	4.6	12 762.5	0.4
Overnight stays	10³	**3 286.6**	**4.7**	**2 800.0**	**2.5**	**57 600.3**	**0.0**
Residents in Portugal	"	958.0	11.3	1 020.1	0.5	16 694.4	5.0
Residents abroad	"	2 328.7	2.3	1 779.9	3.6	40 905.9	-2.0
Average stay	no. of nights	**2.48**	**-1.7**	**2.30**	**-0.8**	**2.74**	**-1.7**
Residents in Portugal	"	1.71	1.1	1.64	-1.5	2.01	1.1
Residents abroad	"	3.04	-1.8	2.97	-0.9	3.21	-2.4
Net bed occupancy rate	%	37.5	0.4 p.p.	32.1	-0.5 p.p.	51.2	-1.0 p.p.
Total revenue	EUR 10⁶	189.3	6.3	171.0	7.3	3 602.4	6.0
Revenue from accommodation	"	134.4	6.3	114.6	5.9	2 654.1	6.5
RevPAR (Average revenue per available room)	EUR	33.8	2.8	28.9	2.3	52.5	4.5

Guests and overnight stays on the rise

In December 2018, hotels and similar establishments hosted 1.2 million guests who spent 2.8 million overnight stays, mirroring change rates of +3.3% and +2.5% (+6.5% and +4.7% respectively in November).

Overnight stays spent in hotels (75.5% of the total) grew by 3.3%. Tourist villages and tourist apartments stood out with increases of 8.8% and 6.2%, respectively.

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

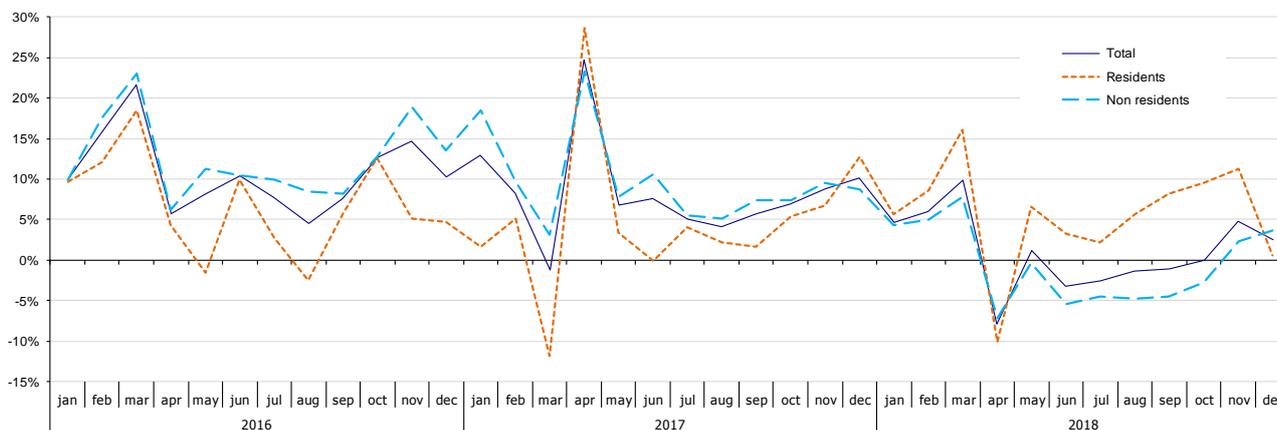**Figure 2. Overnight stays in hotels and similar establishments by type and category**

Unit: 10³

Type of establishment and category	Overnight stays			Year-on-year change rates (%)	
	Dec-17	Dec 18	Jan - Dec 18	Dec 18	Jan - Dec 18
Total	**2 732.3**	**2 800.0**	**57 600.3**	**2.5**	**0.0**
Hotels	**2 045.3**	**2 113.1**	**40 376.0**	**3.3**	**1.4**
*****	345.5	354.8	7 625.4	2.7	2.1
****	1 000.4	1 026.3	19 844.5	2.6	1.7
***	473.2	493.7	8 966.1	4.3	0.1
** / *	226.2	238.3	3 940.0	5.4	1.2
Apartment hotels	**300.9**	**316.4**	**7 582.7**	**5.2**	**- 2.1**
*****	20.4	25.9	516.8	26.8	0.8
****	219.7	235.8	5 554.9	7.4	- 1.6
*** / **	60.8	54.7	1 511.0	-10.0	- 5.0
Pousadas	**38.1**	**37.0**	**594.4**	**-2.8**	**0.5**
Tourist apartments	**140.0**	**148.8**	**4 805.2**	**6.2**	**1.2**
Tourist villages	**88.1**	**95.9**	**2 585.4**	**8.8**	**0.4**
Other tourist establishments	**119.8**	**88.7**	**1 656.5**	**-26.0**	**- 22.2**

External markets accelerated in December

In December, the internal market contributed with 1.0 million overnight stays, which stood for a slight 0.5% growth (+11.3% in November).

The external markets accelerated to a 3.6% growth (+2.3% in November) and corresponded to 1.8 million overnight stays.

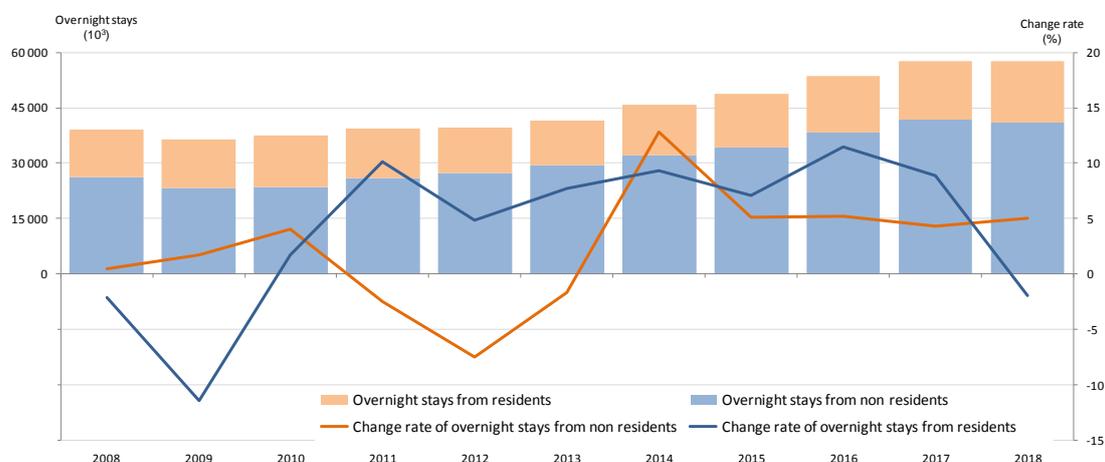**Figure 3. Overnight stays in hotels and similar establishments - Year-on-year change rates**

Bearing in mind the results on hotels and similar establishments over the successive quarters of 2018, chronologically, total overnight stays recorded evolutions of +7.3%, -3.2%, -1.7% and +1.9%, under particular influence of the non residents, which, in the same order, showed change rates of +6.0%, -4.3%, -4.6% and 0.0%.

Figure 4. Overnight stays and year-on-year change rates in hotels and similar establishments, 2018
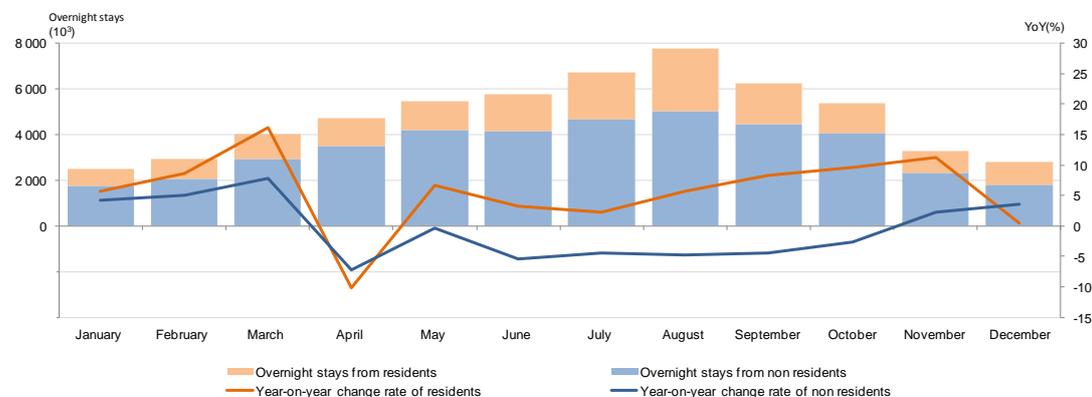
Considering the evolution along the latest years of overnight stays in hotels and similar establishments, it can be seen that between 2008 and 2018 the overnight stays from residents grew by 28.2% while those from non residents raised by 56.1%. As a consequence, the non residents share in total overnight stays evolved from 66.8% in 2008 to 71.0% in 2018.

Figure 5. Overnight stays and change rates in hotels and similar establishments, 2008-2018

The British market continued to recover

The fifteen main inbound markets[2] represented 83.0% of total overnight stays of non residents in hotels and similar establishments in December.

The British market (16.3% of the total overnight stays of non residents in December) grew by 8.5% in December. In 2018, this market held a 21.0% share (-1.3 p.p.) and declined by 7.5% (+1.2% in 2017).

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[2] Based on the preliminary results of overnight stays in 2018.

Overnight stays spent by German guests (12.9% of the total) grew by 5.8% in December and declined by 4.3% between January and December 2018 (+7.8% in 2017). In 2018, this market represented 13.2% of overnight stays from non residents (-0.3 p.p.).

The Spanish market (14.4% of the total) decreased by 7.0% in December, but grew by 1.9% between January and December 2018 (+3.1% in 2017). In 2018, this market held a share of 10.1% (+0.1 p.p.).

The French market (7.3% of the total) declined by 3.2% in December and accounted for a 2.7% decrease in 2018 (+0.7% in 2017). In 2018, this market had a 9.4% share (-0.1 p.p.).

The Brazilian market (8.0% of the total) grew by 9.9% in December and by 9.4% in 2018 (+35.8% in 2017). In 2018, this market represented 5.4% (+0.6 p.p.) of overnight stays from non residents.

In December, the increases recorded in the Canadian (+29.4%), Irish (+28.8%) and North American (+17.9%) markets stood out. In the total year 2018, the emphasis went to the evolutions of the North American (+19.9%) and Canadian (+16.7%) markets, besides the Brazilian, as stated before.

Figure 6. Overnight stays in hotels and similar establishments by main inbound markets: year-on-year change rates
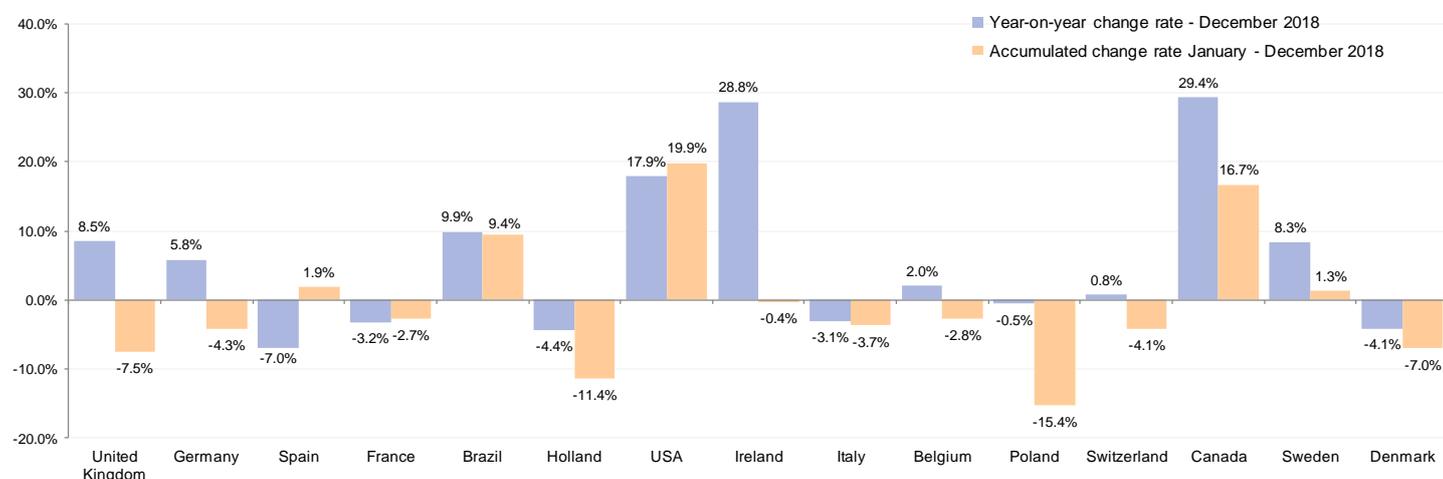
Positive results, mostly, in overnight stays of non residents in December, with emphasis on Alentejo and Algarve

In December, the different regions presented mostly positive results with regard to the evolution of overnight stays in hotels and similar establishments. The Algarve stood out with a 9.2% growth. Conversely, it should be pointed out the decline in AR Açores (-11.2%).

With regard to overnight stays of residents, in December, the only increases were recorded in MA Lisboa (+8.3%) and in the Algarve (+5.5%). The largest declines came from AR Açores (-18.6%) and AR Madeira (-9.0%).

In December, as far as overnight stays of non residents are concerned, the increases recorded in Alentejo (+11.3%) and in the Algarve (+10.6%) stood out. The AR Açores was the only region to record a decrease, although a slight one (-0.6%).

Considering the period from January to December 2018 in hotels and similar establishments, the emphasis regarding overnight stays went to the increases of 5.2% in the Norte (a region with a 13.7% annual weight) and of 3.6% in Alentejo (3.2% share in 2018). The Algarve concentrated 32.7% of all overnight stays in 2018, followed by MA Lisboa (25.2%). In this period, the largest increases in overnight stays of residents were recorded in the Algarve (+9.9%) and in the Centro (+5.1%), while overnight stays of non residents raised only in Alentejo (+7.7%), Norte (+6.0%) and MA Lisboa (+0.6%).

Figure 7. Overnight stays in hotels and similar establishments, by NUTS II regions

Unit: 10^3

NUTS II	Total of overnight stays				Overnight stays from residents				Overnight stays from non residents			
	Dec 18		Jan - Dec 18		Dec 18		Jan - Dec 18		Dec 18		Jan - Dec 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	**2 800.0**	**2.5**	**57 600.3**	**0.0**	**1 020.1**	**0.5**	**16 694.4**	**5.0**	**1 779.9**	**3.6**	**40 905.9**	**-2.0**
Norte	489.9	0.4	7 870.6	5.2	260.2	-2.2	3 327.1	4.1	229.7	3.5	4 543.5	6.0
Centro	313.7	2.2	5 520.0	-3.0	219.3	-0.2	3 043.5	5.1	94.4	8.2	2 476.6	-11.4
MA Lisboa	889.7	2.3	14 496.9	1.1	256.5	8.3	3 193.0	2.9	633.2	0.0	11 304.0	0.6
Alentejo	99.2	-0.7	1 864.4	3.6	74.0	-4.2	1 180.6	1.3	25.2	11.3	683.8	7.7
Algarve	525.7	9.2	18 820.7	-1.0	134.7	5.5	4 379.3	9.9	391.0	10.6	14 441.4	-3.9
AR Açores	60.5	-11.2	1 789.3	0.1	32.6	- 18.6	782.7	4.2	27.9	- 0.6	1 006.6	-2.9
AR Madeira	421.4	0.7	7 238.3	-3.5	42.8	-9.0	788.1	-1.8	378.6	2.0	6 450.1	-3.7

Reduction in the average stay

In December, the average stay (2.30 nights) decreased by 0.8%, due to the reduction in the average stay of residents (-1.5%) and non residents (-0.9%). The most significant reductions were recorded in AR Açores (-3.4%) and MA Lisboa (-2.2%). Conversely, the increase recorded in AR Madeira (+1.1%) stood out. This indicator presented the highest values in the AR Madeira (5.16 nights) and in the Algarve (3.54 nights).

Figure 8. Average stay and net bed occupancy rate in hotels and similar establishments, by NUTS II regions

NUTS II	Average stay				Occupancy rate			
	Dec 18		Jan - Dec 18		Dec 18		Jan - Dec 18	
	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	**2.30**	**-0.8**	**2.74**	**-1.7**	**32.1**	**-0.5**	**51.2**	**-1.0**
Norte	1.67	-1.7	1.82	0.5	34.6	-0.8	47.0	0.8
Centro	1.56	-0.6	1.73	-2.8	25.2	0.6	35.8	-1.7
MA Lisboa	2.15	-2.2	2.31	-0.7	42.6	-0.8	60.1	-0.4
Alentejo	1.66	0.1	1.78	-0.2	25.6	1.0	38.6	1.8
Algarve	3.54	0.5	4.47	-2.5	22.3	0.2	51.2	-1.5
AR Açores	2.59	-3.4	2.93	-2.5	19.4	-3.6	47.7	-1.7
AR Madeira	5.16	1.1	5.24	0.3	46.4	-1.5	66.3	-3.3

Decline in the occupancy rate

The net bed occupancy rate in hotels and similar establishments (32.1%) decreased by 0.5 p.p. in December (+0.4 p.p. in the previous month). The highest occupancy rates were recorded in the AR Madeira (46.4%) and in the MA Lisboa (42.6%). The largest increase in the occupancy rate was recorded in the Alentejo (+1.0 p.p.).

Figure 9. Net bed occupancy rate in hotels and similar establishments
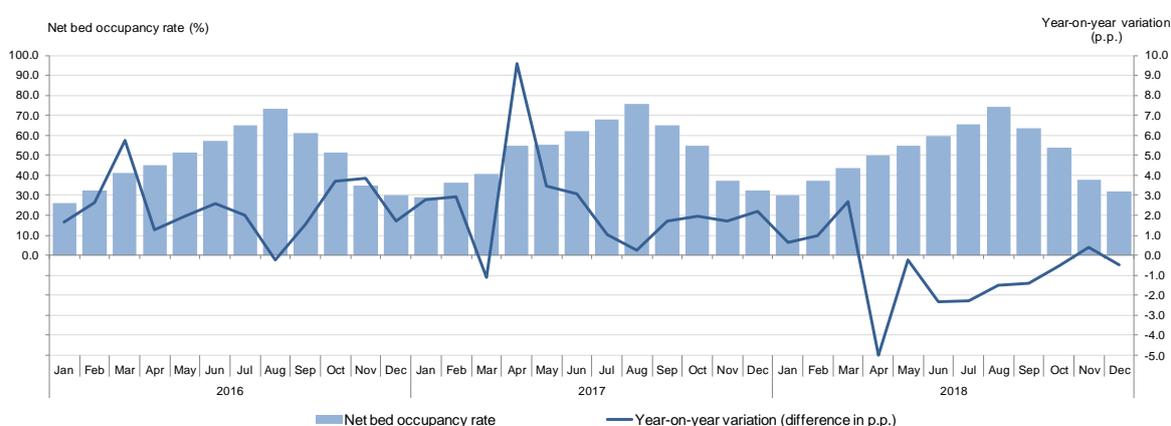
Revenue kept growing

Total revenue in hotels and similar establishments amounted to EUR 171.0 million and revenue from accommodation stood at EUR 114.6 million, corresponding to increases of 7.3% and 5.9% respectively (+6.3% for both in November).

Figure 10. Total revenue and revenue from accommodation in hotels and similar establishments, Year-on-year change rates


Tourism activity – December 2018
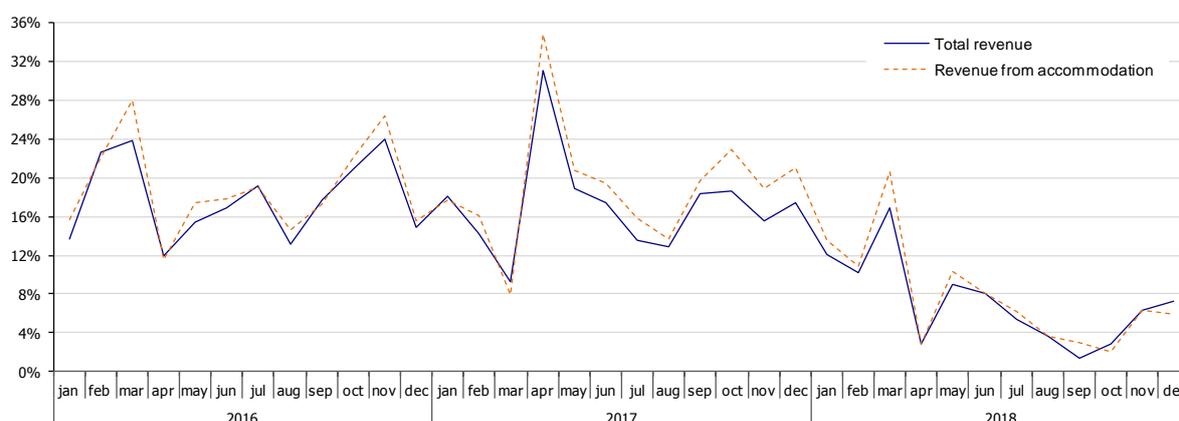
In December, amongst the various regions, the emphasis went to the significant increases in revenue in the Algarve (+19.8% in total revenue and +17.4% in revenue from accommodation), being also worth mentioning the Norte (+8.4% and +7.6%, respectively).

Figure 11. Revenue in hotels and similar establishments, by NUTS II regions

NUTS II	Total revenue				Revenue from accommodation			
	Dec 18		Jan - Dec 18		Dec 18		Jan - Dec 18	
	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	**171.0**	**7.3**	**3 602.4**	**6.0**	**114.6**	**5.9**	**2 654.1**	**6.5**
Norte	30.5	8.4	482.7	12.0	20.9	7.6	366.9	12.5
Centro	17.9	6.7	279.6	2.5	11.3	6.9	193.4	1.9
MA Lisboa	64.2	6.1	1 147.8	7.5	46.1	4.8	892.2	9.4
Alentejo	5.6	-6.9	106.5	5.2	3.6	-3.3	75.1	6.8
Algarve	23.3	19.8	1 081.2	4.7	14.2	17.4	790.7	3.4
AR Açores	3.3	-0.8	94.5	7.9	2.0	-2.3	70.5	10.9
AR Madeira	26.3	4.3	410.1	1.1	16.5	0.9	265.4	1.1

In hotels and similar establishments, the average revenue per available room (RevPAR) was EUR 28.9 in December, which corresponded to an increase of 2.3% (+2.8% in November). The MA Lisboa accounted for the highest RevPAR (EUR 46.7). As regards this indicator, the emphasis went to the increases in the Algarve (+9.5%) and in the Centro (+7.5%).

Figure 12. Average revenue per available room in hotels and similar establishments
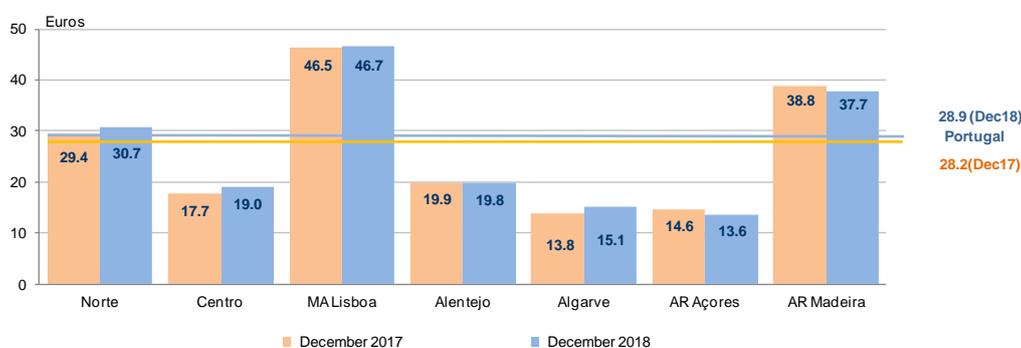
In December, the evolution of RevPAR was overall positive concerning the different typologies. The emphasis was on the evolution of tourist apartments (+8.8%) and apartment hotels (+7.4%). The "pousadas" and the hotels recorded the highest values in this indicator (EUR 46.8 and EUR 32.4 respectively).

Figure 13. RevPAR in hotels and similar establishments by type and category

Type of establishment and category	RevPAR (€)			Year-on-year change rates (%)	
	Dec-17	Dec 18	Jan - Dec 18	Dec 18	Jan - Dec 18
Total	**28.2**	**28.9**	**52.5**	**2.3**	**4.5**
Hotels	**32.4**	**32.4**	**56.9**	**0.1**	**3.9**
*****	55.5	54.0	99.0	-2.8	3.4
****	33.1	32.9	57.7	-0.6	4.0
***	22.4	22.5	38.1	0.8	3.7
** / *	19.3	20.4	30.3	6.0	3.4
Apartment hotels	**21.5**	**23.1**	**50.2**	**7.4**	**3.0**
*****	30.5	36.4	69.6	19.4	4.6
****	22.5	22.7	50.7	0.8	2.1
*** / **	15.1	18.5	41.4	22.8	5.0
Pousadas	**47.2**	**46.8**	**74.2**	**-0.9**	**9.6**
Tourist apartments	**11.3**	**12.3**	**35.1**	**8.8**	**4.0**
Tourist villages	**12.9**	**13.2**	**38.8**	**2.3**	**0.8**
Other tourist establishments	**19.3**	**23.4**	**28.8**	**21.1**	**6.3**

Camping sites and holiday camps

In December 2018, camping sites welcomed 57.3 thousand campers (+8.9%) that spent 213.8 thousand overnight stays (+3.2%). Only the internal market (+6.7%) contributed for the increase in overnight stays, given that the external markets stabilized. The overnight stays were similarly distributed between the internal and the external markets. The average stay (3.73 nights) declined by 5.2%.

In December, holiday camps and youth hostels hosted 15.2 thousand guests (-4.5%) and 31.0 thousand overnight stays (-1.5%). The internal market concentrated 76.5% of the total overnight stays and declined by 4.2%, while the external markets grew by 8.5%. The average stay (2.04 nights) increased by 3.1%.

Figure 14. Camping, holiday camps and youth hostels

	Unit	Total				Residents				Non residents			
		Dec 18		Jan - Dec 18		Dec 18		Jan - Dec 18		Dec 18		Jan - Dec 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	10³	57.3	8.9	1 976.7	2.6	37.8	20.9	1 199.1	2.7	19.5	-8.7	777.5	2.5
Overnight stays	"	213.8	3.2	6 892.7	4.8	106.9	6.7	4 423.4	5.5	107.0	0.0	2 469.3	3.6
Average stay	no. nights	3.73	-5.2	3.49	2.1	2.83	-11.7	3.69	2.7	5.50	9.6	3.18	1.0
Holiday camps and youth hostels													
Guests	10³	15.2	-4.5	331.5	0.3	12.3	-7.4	242.0	-1.7	3.0	10.2	89.5	6.1
Overnight stays	"	31.0	-1.5	695.3	-0.1	23.7	-4.2	494.6	-3.9	7.3	8.5	200.7	10.7
Average stay	no. nights	2.04	3.1	2.10	-0.4	1.93	3.5	2.04	-2.3	2.47	- 1.5	2.24	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 November: provisional results; 2018 – December: 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 Nov. 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: 15 March 2019

Additional note:

The preliminary/provisional results published in this Press release refer to the set of hotels and similar establishments considering the typologies described above, giving continuity to the historical time series of the last decades.
From the next Press release on the tourist activity, related to January 2019, Statistics Portugal will begin the monthly dissemination of time series on the activity of tourist accommodation, using a broader reference universe, which will includes local accommodation units with 10 or more beds and also tourism in rural areas and lodging tourism.