

15 March 2019

Tourism Activity  
January 2019

**Growth in the main indicators of the tourism accommodation sector**

The tourism accommodation sector<sup>1</sup> registered 1.3 million guests and 3.0 million overnight stays in January 2019, corresponding to year-on-year changes rates<sup>2</sup> of +7.2% and +4.7%, respectively (+4.6% and +3.2% in December 2018, in the same order). Overnight stays of residents had a 8.2% growth (+0.9% in December) and those of non residents increased by 3.1% (+4.6% in December).

In January, the average stay (2.38 nights) declined by 2.3% (-0.6% as regards residents and -2.5% for non residents).

The net bed occupancy rate (28.4%) increased by 0.2 p.p. in January (-0.5 p.p. in December).

Revenue accelerated, with total revenue increasing by 8.7% (+7.7% in December) and reaching EUR 162.7 million. Revenue from accommodation (EUR 114.3 million) grew by 8.2% (+6.3% in December).

**Figure 1. Global results of the tourism accommodation sector**

Global preliminary results	Unit	December 2018		January 2019	
		Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)
<b>Guests</b>	<b>10<sup>3</sup></b>	<b>1 419.5</b>	<b>4.6</b>	<b>1 250.4</b>	<b>7.2</b>
Residents in Portugal	"	725.6	3.0	588.2	8.8
Residents abroad	"	693.8	6.4	662.2	5.7
<b>Overnight stays</b>	<b>10<sup>3</sup></b>	<b>3 219.3</b>	<b>3.2</b>	<b>2 976.7</b>	<b>4.7</b>
Residents in Portugal	"	1 203.9	0.9	963.1	8.2
Residents abroad	"	2 015.5	4.6	2 013.6	3.1
<b>Average stay</b>	<b>no. of nights</b>	<b>2.27</b>	<b>-1.4</b>	<b>2.38</b>	<b>-2.3</b>
Residents in Portugal	"	1.66	-2.1	1.64	-0.6
Residents abroad	"	2.90	-1.7	3.04	-2.5
Net bed occupancy rate	%	30.4	-0.5 p.p.	28.4	0.2 p.p.
Total revenue	EUR 10 <sup>6</sup>	187.3	7.7	162.7	8.7
Revenue from accommodation	"	127.9	6.3	114.3	8.2
RevPAR (Average revenue per available room)	EUR	26.9	1.6	24.4	4.9

**Guests and overnight stays on the rise**

In January 2019, the tourism accommodation sector registered 1.3 million guests who spent 3.0 million overnight stays, mirroring change rates of +7.2% and +4.7% (+4.6% and +3.2% respectively in December).

<sup>1</sup> With this press release, Statistics Portugal begins the dissemination of a new monthly series which, similarly to the annual series, will include three types of accommodation facilities: hotel establishments (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. In the last page of this press release, a comparison is made between the current monthly series and the previous series which did not include the majority of the local accommodation and the rural/lodging tourism.

<sup>2</sup> Unless stated otherwise, the change rates presented in this press release correspond to year-on-year change rates.

Overnight stays spent in hotel establishments (84.7% of the total) grew by 4.7% in January. Overnight stays spent in local accommodation establishments (13.5% of the total) and in rural/lodging tourism (1.7% of the total) grew by 4.4% and by 8.9%, respectively. Tourist villages stood out growing by 10.2%.

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

Unidade: 10<sup>3</sup>

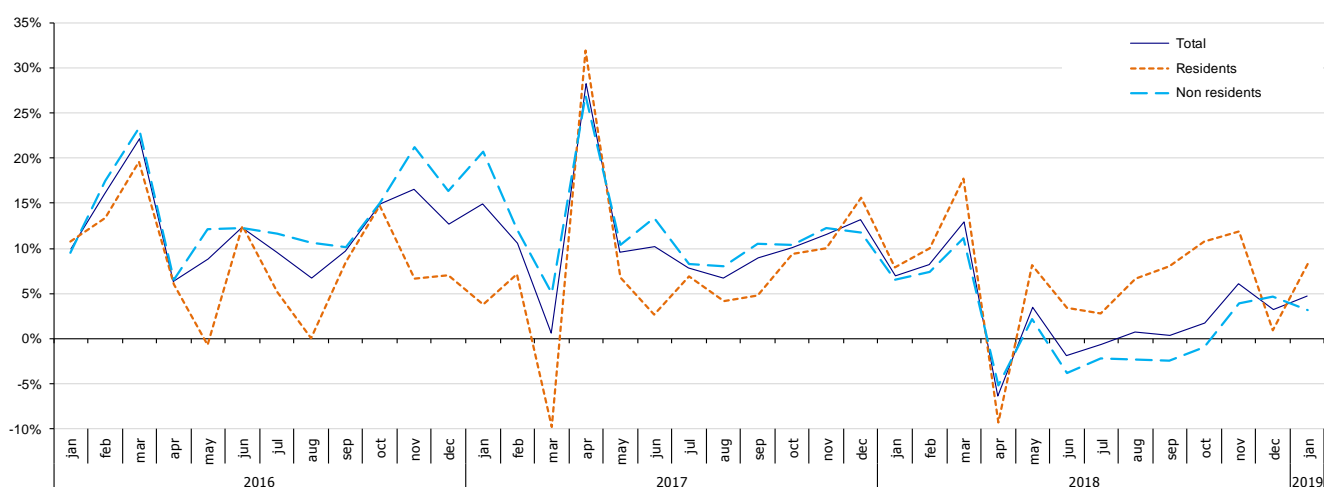
Type of establishment and category	Overnight stays		Year-on-year change rates (%)
	Jan-18	Jan 19	Jan 19
<b>Total</b>	<b>2 842.2</b>	<b>2 976.7</b>	<b>4.7</b>
<b>Hotels and similar</b>	<b>2 409.2</b>	<b>2 522.6</b>	<b>4.7</b>
Hotels	1 833.7	1 922.0	4.8
*****	330.8	353.3	6.8
****	896.2	919.8	2.6
***	414.0	444.3	7.3
** / *	192.8	204.7	6.2
Apartment hotels	304.5	318.7	4.7
*****	22.6	28.3	25.0
****	217.1	233.9	7.7
*** / **	64.8	56.6	-12.6
Pousadas and quintas da Madeira	44.4	42.4	-4.4
Tourist apartments	139.1	143.0	2.8
Tourist villages	87.5	96.5	10.2
<b>Local accommodation</b>	<b>385.3</b>	<b>402.1</b>	<b>4.4</b>
<b>Tourism in rural areas and lodging tourism</b>	<b>47.7</b>	<b>51.9</b>	<b>8.9</b>

### Internal market with greater increase

In January, the internal market contributed with 963.1 thousand overnight stays, which stood for a 8.2% growth (+0.9% in December).

The external markets decelerated to a 3.1% growth (+4.6% in the preceding month), attaining 2.0 million overnight stays.

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



**The Chinese and the North American markets stood out**

The sixteen main inbound markets<sup>3</sup> represented 83.7% of total overnight stays of non residents spent in tourism accommodation establishments in January.

The British market (16.8% of the total overnight stays of non residents) grew by 4.3% in January, keeping the increases of 9.7% in December and 8.7% in November (following reductions since October 2017).

Overnight stays spent by German guests (12.6% of the total) fell by 1.5% in January (+5.0% in December).

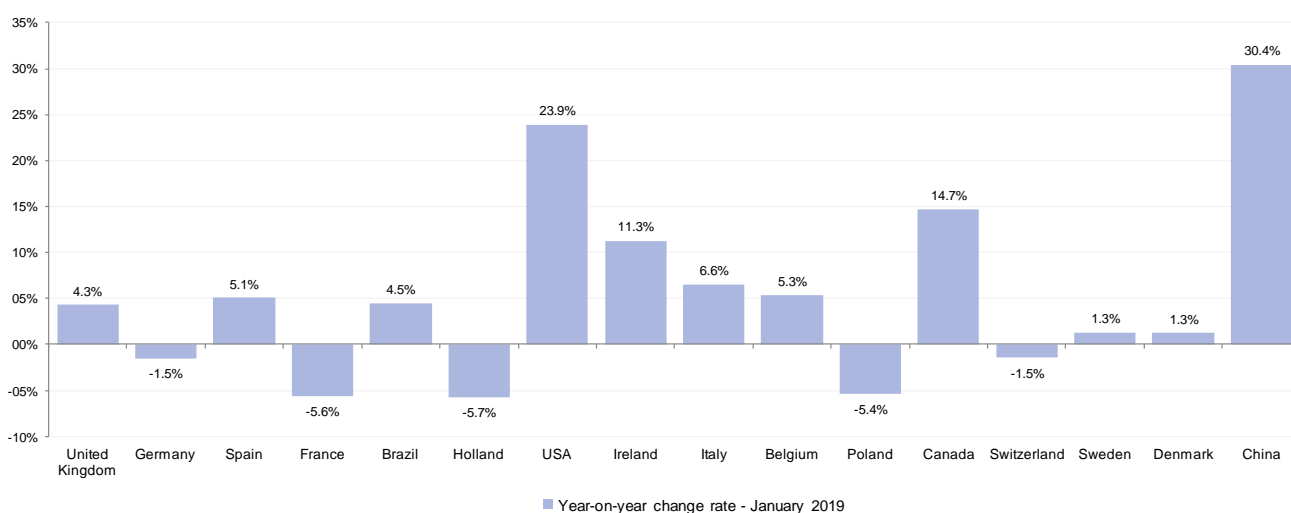
The Brazilian market (10.5% share) grew by 4.5%, slowing down compared with the significant increases in December (+14.4%) and November (+13.5%).

The Spanish market (weight of 8.4%) grew by 5.1% in January, in contrast with the decline recorded in December (-5.8%).

In what concerns French guests (7.7% share), the decline trend on overnight stays continued (-5.6% in January, after -2.4% in the preceding month).

In January, the emphasis was on the increases recorded in the Chinese (+30.4%), North American (+23.9%), Canadian (+14.7%) and Irish (+11.3%) markets.

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



<sup>3</sup> Based on the provisional results of overnight stays in 2018.

## Overnight stays have increased in most regions

In January, the different regions presented mostly positive results with regard to the evolution of overnight stays spent in tourism accommodation establishments, with the emphasis on the increases recorded in the Alentejo (+18.3%) and in the Norte (+10.5%). Conversely, there was a decline in AR Madeira (-2.5%). In this month, there were more 134.5 thousand overnight stays (vis-à-vis the same month a year earlier) of which 35.1% originated in the Norte (47.2 thousand additional overnight stays) and 30.0% in the Algarve (40.4 thousand more).

With regard to overnight stays of residents, in January, there were increases in all regions, more so in the Alentejo (+22.8%), AR Açores (+17.2%) and AR Madeira (+16.0%).

In January, as far as overnight stays of non residents are concerned, the increase recorded in the Centro (+13.7%) stood out. It is also worthy of mention the Norte (+9.9%), Alentejo (+8.0%) and Algarve (+7.4%). In both Autonomous Regions there were reductions in overnight stays from non residents.

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

Unit: 10<sup>3</sup>

NUTS II	Overnight stays					
	Total		Residents		Non residents	
	Jan 19	Y-o-y change rate (%)	Jan 19	Y-o-y change rate (%)	Jan 19	Y-o-y change rate (%)
<b>Portugal</b>	<b>2 976.7</b>	<b>4.7</b>	<b>963.1</b>	<b>8.2</b>	<b>2 013.6</b>	<b>3.1</b>
Norte	498.5	10.5	247.6	11.1	250.9	9.9
Centro	294.0	7.2	191.0	4.0	103.0	13.7
MA Lisboa	963.0	2.0	247.8	1.3	715.2	2.2
Alentejo	111.3	18.3	80.7	22.8	30.6	8.0
Algarve	547.6	8.0	105.9	10.4	441.7	7.4
AR Açores	72.4	5.6	43.5	17.2	28.9	-8.0
AR Madeira	489.8	-2.5	46.5	16.0	443.4	-4.1

## Reduction in the average stay

In January, the average stay in tourism accommodation establishments (2.38 nights) declined by 2.3%, as a result of reductions from both residents (-0.6%) and non residents (-2.5%). The largest decrease was recorded in the Algarve (-5.4%), in contrast with the increase in the Alentejo (+9.7%). This indicator presented the highest values, as usual, in AR Madeira (5.40 nights) and in the Algarve (3.97 nights).

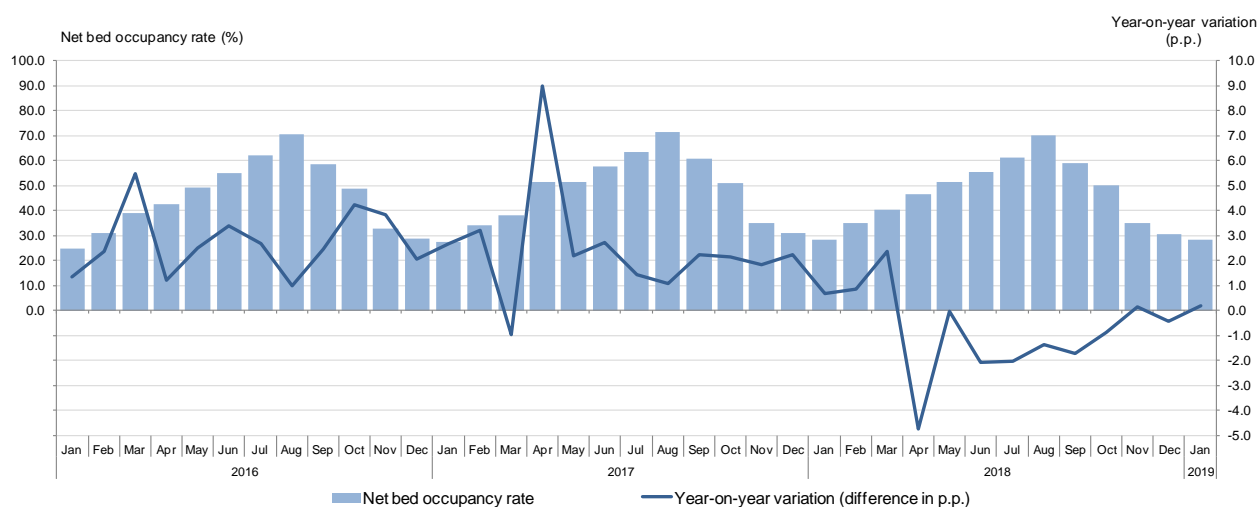
**Figure 6. Average stay and net bed occupancy rate in tourism accommodation establishments by NUTS II**

NUTS II	Average stay		Occupancy rate	
	Jan 19		Jan 19	
	No. of nights	Y-o-y change rate (%)	%	Y-o-y variation (p.p.)
<b>Portugal</b>	<b>2.38</b>	<b>-2.3</b>	<b>28.4</b>	<b>0.2</b>
Norte	1.67	-1.8	26.2	0.6
Centro	1.54	1.3	18.5	0.8
MA Lisboa	2.18	-2.5	37.9	-1.2
Alentejo	1.75	9.7	19.2	3.2
Algarve	3.97	-5.4	21.8	1.3
AR Açores	2.62	-0.8	22.1	0.3
AR Madeira	5.40	0.3	47.3	-3.8

### Slight increase in the occupancy rate

In January, the net bed occupancy rate (28.4%) in tourism accommodation establishments increased by 0.2 p.p. (-0.5 p.p. in the previous month). The highest occupancy rates were recorded in AR Madeira (47.3%) and MA Lisboa (37.9%). The largest increase in the occupancy rate occurred in the Alentejo (+3.2 p.p.).

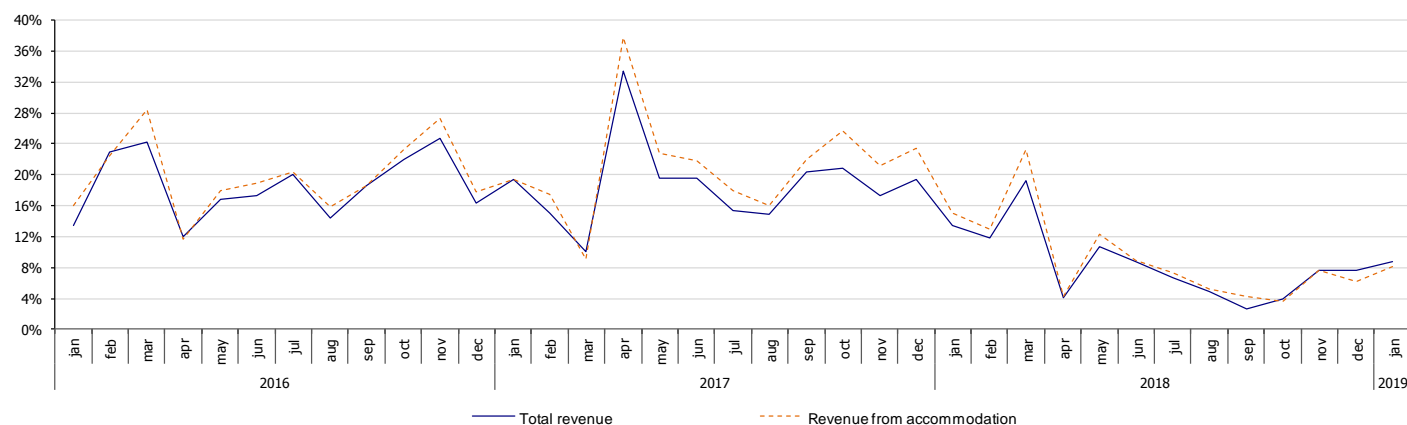
**Figure 7. Net bed occupancy rate in tourism accommodation establishments**



### Acceleration in revenue

Total revenue in tourism accommodation establishments amounted to EUR 162.7 million and revenue from accommodation stood at EUR 114.3 million, corresponding to increases of 8.7% and 8.2%, respectively (+7.7% and +6.3% in December, in the same order).

**Figure 8. Total revenue and revenue from accommodation in tourism accommodation establishments: Year-on-year change rates**



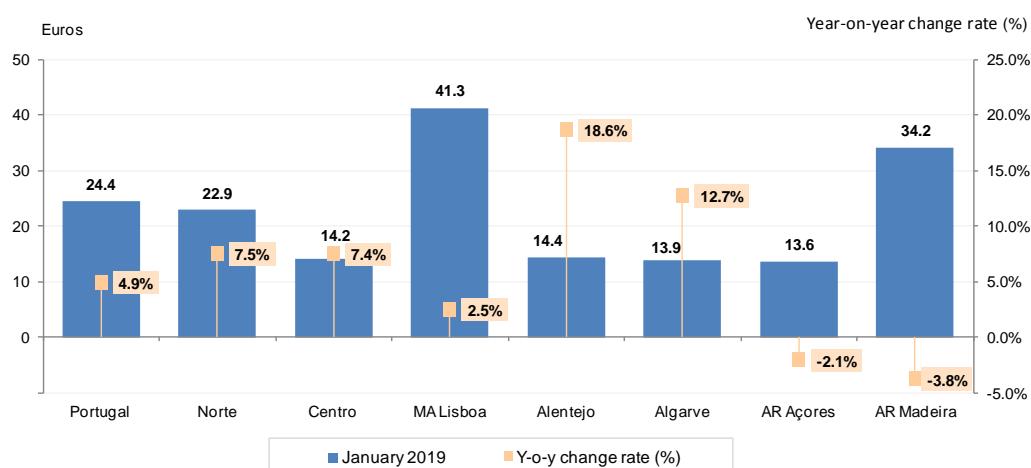
In January, amongst the various regions, the emphasis went to the increases in the Algarve (+23.0% in total revenue and +14.7% in revenue from accommodation) and in the Alentejo (+15.5% and +19.9%, respectively). In December, the Algarve had also been stood out in terms of the evolution of total revenue and revenue from accommodation (+18.4% and +17.2%, in the same order).

**Figure 9. Revenue in tourism accommodation establishments, by NUTS II regions**

NUTS II	Total revenue		Revenue from accommodation	
	Jan 19		Jan 19	
	EUR 10 <sup>6</sup>	Y-o-y change rate (%)	EUR 10 <sup>6</sup>	Y-o-y change rate (%)
<b>Portugal</b>	<b>162.7</b>	<b>8.7</b>	<b>114.3</b>	<b>8.2</b>
Norte	26.4	11.4	19.7	12.9
Centro	15.8	9.1	10.4	8.3
MA Lisboa	64.2	7.4	47.2	6.6
Alentejo	5.8	15.5	3.9	19.9
Algarve	22.4	23.0	14.2	14.7
AR Açores	3.0	1.8	2.1	1.3
AR Madeira	25.1	- 1.7	16.8	1.0

In the tourism accommodation establishments, the average revenue per available room (RevPAR) was EUR 24.4 in January, which corresponded to an increase of 4.9% (+1.6% in December). MA Lisboa accounted for the highest RevPAR (EUR 41.3). As regards this indicator, the emphasis went to the increases in the Alentejo (+18.6%) and in the Algarve (+12.7%).

**Figure 10. Average revenue per available room in tourism accommodation establishments**



The evolution of RevPAR was overall positive concerning the different typologies and respective categories. The emphasis was on the increases recorded in rural/lodging tourism (+15.4%), apartment hotels (+14.4%), tourist apartments (+12.5%) and tourist villages (+11.5%). The set of pousadas and quintas da Madeira and also hotels had the highest values in this indicator (EUR 42.9 and EUR 29.3, respectively). With regard to local accommodation, the resulting RevPAR changed very slightly (-0.1%).

**Figure 11. RevPAR in tourism accommodation establishments, by type and category**

Type of establishment and category	RevPAR (€)		Year-on-year change rate (%)
	Jan-18	Jan 19	Jan 19
<b>Total</b>	<b>23.3</b>	<b>24.4</b>	<b>4.9</b>
<b>Hotels and similar</b>	<b>25.3</b>	<b>26.6</b>	<b>5.1</b>
Hotels	28.5	29.3	3.0
*****	47.1	50.2	6.7
****	28.8	28.9	0.3
***	19.5	20.0	2.6
** / *	17.4	18.3	4.8
Apartment hotels	18.7	21.3	14.4
*****	28.7	38.8	35.1
****	18.7	20.8	11.3
*** / **	15.5	15.5	0.2
Pousadas and quintas da Madeira	42.4	42.9	1.2
Tourist apartments	10.5	11.8	12.5
Tourist villages	11.8	13.2	11.5
<b>Local accommodation</b>	<b>16.4</b>	<b>16.4</b>	<b>-0.1</b>
<b>Tourism in rural areas and lodging tourism</b>	<b>9.8</b>	<b>11.3</b>	<b>15.4</b>

### Camping sites and holiday camps

In January 2019, camping sites welcomed 52.5 thousand campers (+14.2%) that spent 220.1 thousand overnight stays (+5.9%). Both the internal (+7.3%) and the external (+5.0%) markets contributed for the increase in overnight stays. The external markets were predominant, representing 61.3% of overnight stays. The average stay (4.20 nights) declined by 7.3%.

Holiday camps and youth hostels hosted 12.1 thousand guests (+3.4%) and 24.9 thousand overnight stays (+8.5%). The internal market concentrated 72.9% of the total overnight stays and grew by 12.8%. The external markets declined by 1.4%. The average stay (2.07 nights) increased by 5.0%.

## Accommodation activity – overall view

In January 2019, considering all means of accommodation, there were 1.3 million guests who spent 3.2 million overnight stays, corresponding to change rates of +7.4% and +4.8%, respectively (+4,7% e +3,3% in December 2018).

Overnight stays of residents increased by 8.2% (+1.2% in December) and those of non residents grew by 3.2% (+4.7% in the preceding month), considering all means of accommodation. The external markets were predominant, representing 66.9% of the total overnight stays.

In this global set of accommodation establishments, the average stay (2.45 nights) decreased by 2.4% (-0.9% from residents and -2.4% from non residents).

**Figure 12. Main indicators of accommodation activity**

NUTS II		Jan 19					
		Total		Residents		Non residents	
		Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)
<b>Guests</b>							
<b>Total</b>	10 <sup>3</sup>	<b>1 314.9</b>	<b>7.4</b>	<b>625.4</b>	<b>9.2</b>	<b>689.4</b>	<b>5.8</b>
Tourist accommodation establishments	"	1 250.4	7.2	588.2	8.8	662.2	5.7
Camping sites	"	52.5	14.2	27.6	20.0	24.8	8.3
Holiday camps and youth hostels	"	12.1	3.4	9.6	5.4	2.4	-3.7
<b>Overnight stays</b>							
<b>Total</b>	10 <sup>3</sup>	<b>3 221.7</b>	<b>4.8</b>	<b>1 066.3</b>	<b>8.2</b>	<b>2 155.4</b>	<b>3.2</b>
Tourist accommodation establishments	"	2 976.7	4.7	963.1	8.2	2 013.6	3.1
Camping sites	"	220.1	5.9	85.1	7.3	135.0	5.0
Holiday camps and youth hostels	"	24.9	8.5	18.2	12.8	6.8	-1.4
<b>Average stay</b>							
<b>Total</b>	no. Nights	<b>2.45</b>	<b>-2.4</b>	<b>1.70</b>	<b>-0.9</b>	<b>3.13</b>	<b>-2.4</b>
Tourist accommodation establishments	"	2.38	-2.3	1.64	-0.6	3.04	-2.5
Camping sites	"	4.20	-7.3	3.08	-10.6	5.44	-3.1
Holiday camps and youth hostels	"	2.07	5.0	1.89	7.0	2.76	2.4



### New series on tourism accommodation

With this press release, Statistics Portugal begins the dissemination of a new monthly series, which, in comparison with the previous one, has a larger scope, now including all modalities of local accommodation with 10 or more bed places, as well as rural/lodging tourism. Previously, with regard to this type of accommodation, only annual figures were made available. The goal behind this new procedure is to respond to information needs regarding these types of accommodation, given the increase of their importance in the tourism activity.

The dissemination of the new series was preceded by a sufficiently long data collection period to stabilize the data collection process, in order to get monthly results with the appropriate level of statistical quality.

The chart below shows that, as with the annual series, although systematically presenting higher levels than the previous monthly series, the new monthly series seems to exhibit a similar pattern of seasonality but with slightly steeper peaks in the summer months.

In the meanwhile, Statistics Portugal continues to develop the information collection process, in particular by studying the possibility of using less conventional data sources, in order to obtain an even broader statistical coverage on tourism accommodation activity, comprising less structured sets of accommodation on offer.

**Figure 13. Overnight stays by month, 2016-2019**



## 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: 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 Dec. 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.

**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 AR 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 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 April 2019