15 April 2019

Tourism Activity

February 2019

Revenue increased but with slight reduction in overnight stays

The tourism accommodation sector[1] registered 1.4 million guests and 3.3 million overnight stays in February 2019, corresponding to year-on-year rates of change[2] of +2.9% and -1.0%, respectively (+6.4% and +4.5% in January, in the same order). Overnight stays of residents declined by 2.6% (+6.0% in January) and those of non-residents reduced slightly (-0.2%; +3.9% in January). These results are influenced by a base effect of last year's Carnival, in February.

In February, the average stay (2.42 nights) declined by 3.8% (-2.5% as regards residents and -5.5% for non-residents).

The net bed occupancy rate (33.5%) decreased by 1.5 p.p. in February (+0.1 p.p. in January).

Revenue slowed down, with total revenue increasing by 4.4% (+8.8% in January) and reaching EUR 172.0 million. Revenue from accommodation (EUR 119.8 million) grew by 2.8% (+8.1% in January).

Figure 1. Global results of the tourism accommodation sector

Global preliminary results	Unit	January 2019		February 2019		Jan - Feb 19	
		Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)
Guests	**10^3**	**1 241.6**	**6.4**	**1 365.0**	**2.9**	**2 606.6**	**4.6**
Residents in Portugal	"	574.8	6.3	618.2	-0.1	1 192.9	2.9
Residents abroad	"	666.9	6.5	746.8	5.6	1 413.6	6.0
Overnight stays	**10^3**	**2 971.4**	**4.5**	**3 301.1**	**-1.0**	**6 272.5**	**1.6**
Residents in Portugal	"	943.1	6.0	1 021.9	-2.6	1 965.0	1.3
Residents abroad	"	2 028.3	3.9	2 279.2	-0.2	4 307.5	1.7
Average stay	**no. of nights**	**2.39**	**-1.8**	**2.42**	**-3.8**	**2.41**	**-2.9**
Residents in Portugal	"	1.64	-0.3	1.65	-2.5	1.65	-1.5
Residents abroad	"	3.04	-2.4	3.05	-5.5	3.05	-4.1
Net bed occupancy rate	%	28.3	0.1 p.p.	33.5	-1.5 p.p.	30.8	-0.7 p.p.
Total revenue	EUR 10^6	162.8	8.8	172.0	4.4	334.8	6.5
Revenue from accommodation	"	114.2	8.1	119.8	2.8	234.1	5.3
RevPAR (Average revenue per available room)	EUR	24.4	4.6	27.3	0.1	25.8	2.2

The number of non-residents' guests kept growing

In February 2019, the tourism accommodation sector registered 1.4 million guests who spent 3.3 million overnight stays, mirroring rates of change of +2.9% and -1.0%, respectively (+6.4% and +4.5% in January, in the same order).

It should be noted that the results are influenced by the base effect, in 2018, of the Carnival in February, while in 2019 these festivities took place in March.

[1] In 2019, Statistics Portugal began the dissemination of a new monthly series, which, similarly to the annual series, includes 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.

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

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Overnight stays spent in hotel establishments (85.2% of the total) decreased by 1.3% in February. Overnight stays spent in local accommodation establishments (12.9% of the total) grew by 3.1% while those spent in rural/lodging tourism (1.8% of the total) reduced by 10.2%.

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

Unit: 10^3

Type of establishment and category	Overnight stays			Year-on-year change rates (%)	
	Feb-18	Feb 19	Jan - Feb 19	Feb 19	Jan - Feb 19
Total	**3 333.4**	**3 301.1**	**6 272.5**	**-1.0**	**1.6**
Hotels and similar	**2 851.4**	**2 813.3**	**5 335.0**	**-1.3**	**1.4**
Hotels	**2 119.9**	**2 095.0**	**4 017.0**	**-1.2**	**1.6**
*****	378.4	385.6	740.9	1.9	4.5
****	1 042.1	1 018.2	1 936.4	-2.3	- 0.1
***	486.5	486.8	934.0	0.1	3.7
** / *	212.8	204.4	405.7	-3.9	0.0
Apartment hotels	**373.1**	**377.8**	**698.6**	**1.3**	**3.1**
*****	25.5	37.8	68.1	48.2	41.4
****	269.7	273.6	507.7	1.4	4.3
*** / **	77.9	66.4	122.8	-14.7	- 13.9
Pousadas and quintas da Madeira	**52.5**	**43.0**	**86.7**	**-18.1**	**- 10.5**
Tourist apartments	**188.1**	**183.4**	**324.4**	**-2.5**	**- 0.8**
Tourist villages	**117.9**	**114.1**	**208.4**	**-3.2**	**1.5**
Local accommodation	**414.3**	**427.0**	**825.9**	**3.1**	**3.3**
Tourism in rural areas and lodging tourism	**67.7**	**60.8**	**111.6**	**-10.2**	**- 3.3**

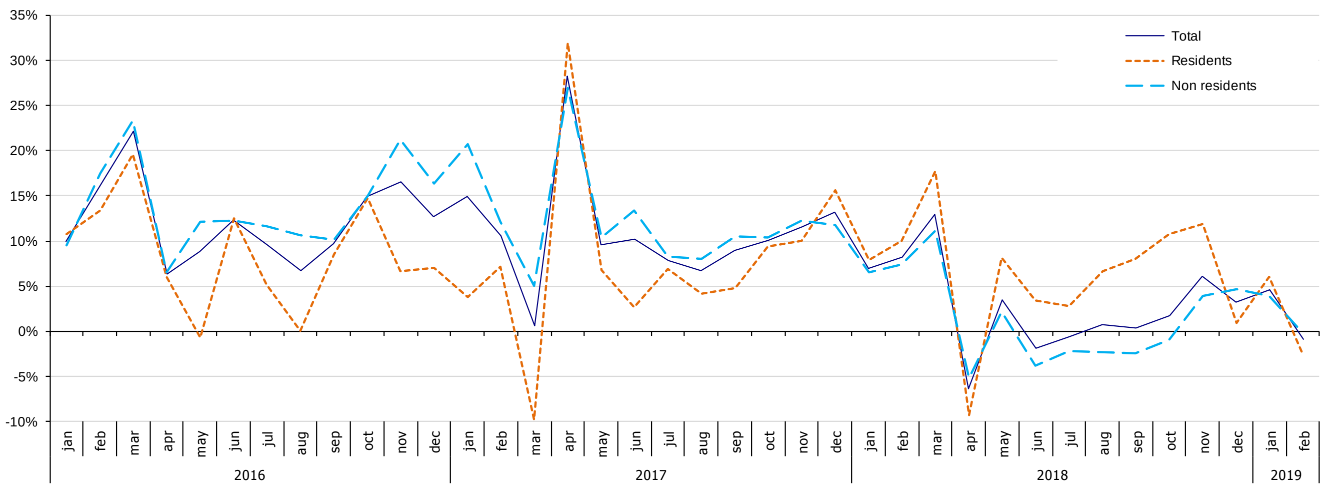
Overnight stays with greater decline at the internal market

In February, the internal market contributed with 1.0 million overnight stays which stood for a decline of 2.6% (+6.0% in January).

The external markets (69.0% share in February) decreased slightly (-0.2%, after +3.9% in January), attaining 2.3 million overnight stays.

When considering the first two months of the year, there was a 1.6% rise in total overnight stays, resulting from +1.3% for residents and +1.7% considering non-residents.

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



The North American market stood out in terms of growth

The sixteen main inbound markets[3] represented 85.3% of overnight stays of non-residents spent in tourism accommodation establishments in February.

The British market (18.4% of the total overnight stays of non-residents in February) grew by 2.1% this month and by 3.2% considering the two first months of the year.

Overnight stays of German guests (13.1% of the total) fell by 11.8% in February. Since the beginning of the year, this market accounted for a reduction of 7.0%.

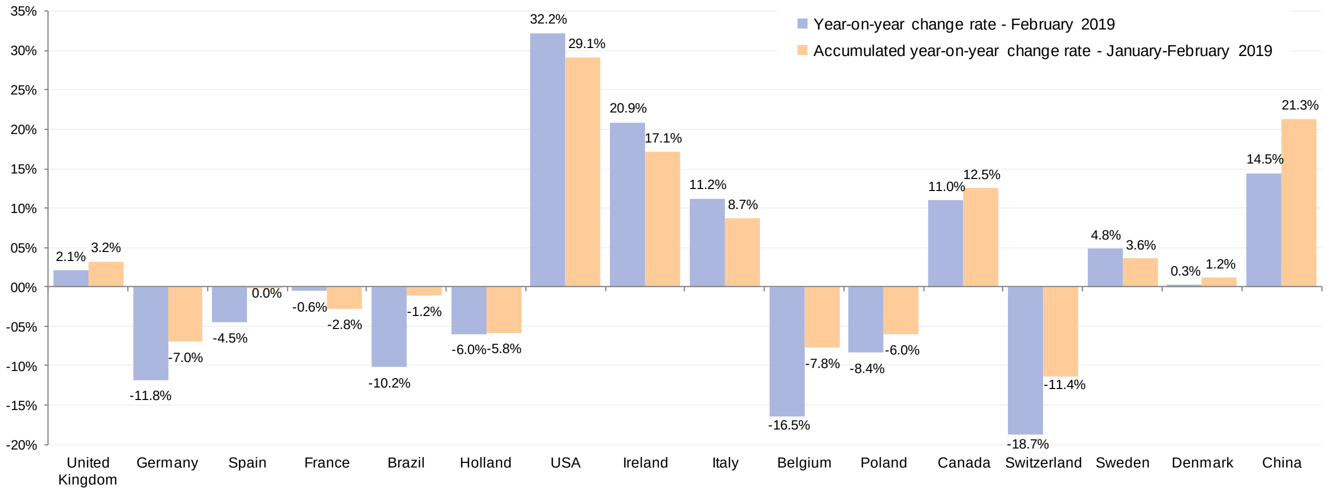
The Spanish market (8.8% of the total) declined by 4.5% in February and registered null variation in the first two months of the year.

Concerning French guests (8.6% of the total), there was a slight reduction (-0.6%, -2.8% in cumulative terms).

The Brazilian market (6.2% of the total) presented a decrease of 10.2% in February. Since the beginning of the year, this market declined by 1.2%.

In February, the emphasis was on the increases recorded in the North American (+32.2%), Irish (+20.9%) and Chinese (+14.5%) markets. Considering the first two months of the year, the same markets stood out (+29.1%, +17.1% and +21.3%, respectively).

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



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

Different trends in overnight stays amongst the regions

In February, the different regions presented different outcomes in terms of the evolution of overnight stays. RA Açores and the Algarve stood out, increasing by 2.1% and 1.2%, respectively. Conversely, the Centro and RA Madeira recorded the biggest reductions (-4.5% and -3.9%, respectively).

Considering the first two months of the year, the emphasis was on the increases of 7.9% in the Alentejo (a region with a 3.7% share in the accumulated total of overnight stays) and 4.1% in the Norte (15.9% share in the same period).

In what concerns overnight stays by residents in February, the increases in overnight stays in RA Açores (+9.5%), RA Madeira (+7.7%) and Alentejo (+7.6%) stood out. On the contrary, the largest decrease occurred in the Centro (-9.5%). Since the beginning of the year, the emphasis was on the increases in the Alentejo (+14.2%) and RA Açores (+12.4%).

With regard to overnight stays of non-residents, in February, the increase in the Centro (+7.1%) stood out, being also worth mentioning the Norte (+2.9%) and the Algarve (+2.4%) and, conversely, the decline in the Alentejo (-14.1%). As regards the two first months of the year, the emphasis was in the Centro (+12.5%) and in the Norte (+6.8%).

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

Unit: 10^3

NUTS II	Total of overnight stays				Overnight stays from residents				Overnight stays from non residents			
	Feb 19		Jan - Feb 19		Feb 19		Jan - Feb 19		Feb 19		Jan - Feb 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	**3 301.1**	**-1.0**	**6 272.5**	**1.6**	**1 021.9**	**-2.6**	**1 965.0**	**1.3**	**2 279.2**	**-0.2**	**4 307.5**	**1.7**
Norte	511.5	0.7	998.8	4.1	243.9	-1.5	477.2	1.4	267.6	2.9	521.6	6.8
Centro	324.2	-4.5	621.6	1.3	214.0	-9.5	404.0	-3.8	110.2	7.1	217.6	12.5
MA Lisboa	1021.9	-1.1	1 991.0	0.7	249.6	-3.7	498.3	-1.1	772.2	-0.2	1 492.8	1.3
Alentejo	119.6	0.5	230.0	7.9	86.1	7.6	166.4	14.2	33.6	-14.1	63.7	-5.5
Algarve	741.2	1.2	1 285.6	3.7	127.4	-4.2	231.5	1.2	613.8	2.4	1 054.0	4.3
AR Açores	83.4	2.1	155.4	3.4	54.2	9.5	97.4	12.4	29.2	-9.2	58.0	-8.8
AR Madeira	499.2	-3.9	990.1	-3.1	46.7	7.7	90.2	8.1	452.5	-5.0	899.9	-4.1

Overnight stays by municipality

Given the growing interest in information with municipal disaggregation, Statistics Portugal begins the dissemination, in this press release, of information for the municipalities with the highest share of overnight stays in the tourism accommodation sector.

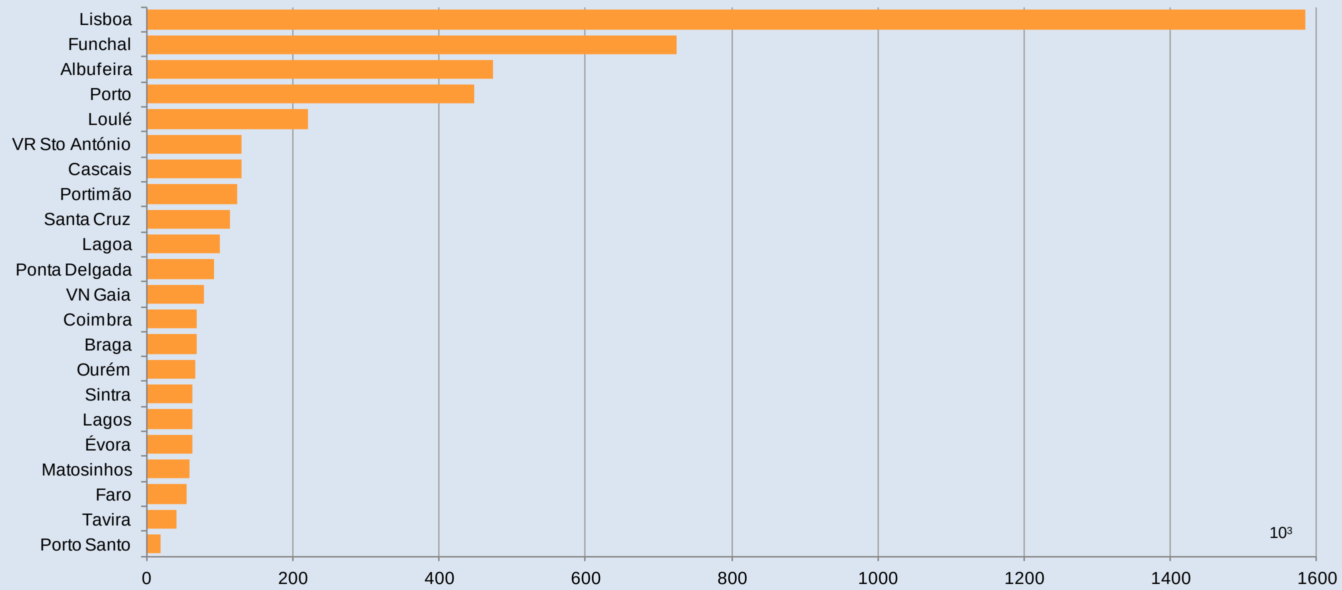
Figure 6 shows information concerning the municipalities[4] that accounted for 75% of overnight stays in tourist accommodation locations throughout the country.

Lisboa was the main destination, representing 24.6% of total overnight stays in February, up by 25.3% when considering the first two months of the year.

Funchal accounted for a 11.0% share of the total overnight stays in February and 11.5% in the first two months of the year.

In February, overnight stays spent in Albufeira represented 8.6% of the total in the country and 7.6% since the beginning of the year.

Figure 6. Overnight stays in tourist accommodation establishments by main destinations
Accumulated period January-February 2019



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

Reduction in the average stay

In February, the average stay in tourism accommodation establishments (2.42 nights) declined by 3.8%, as a result of reductions from both residents (-2.5%) and non-residents (-5.5%). There were reductions in the average stay in all regions, more so in RA Açores (-11,9%) and in the Algarve (-8.4%). In the RA Madeira and in the Algarve this indicator reached the highest values: 5.17 and 4.04 nights, respectively.

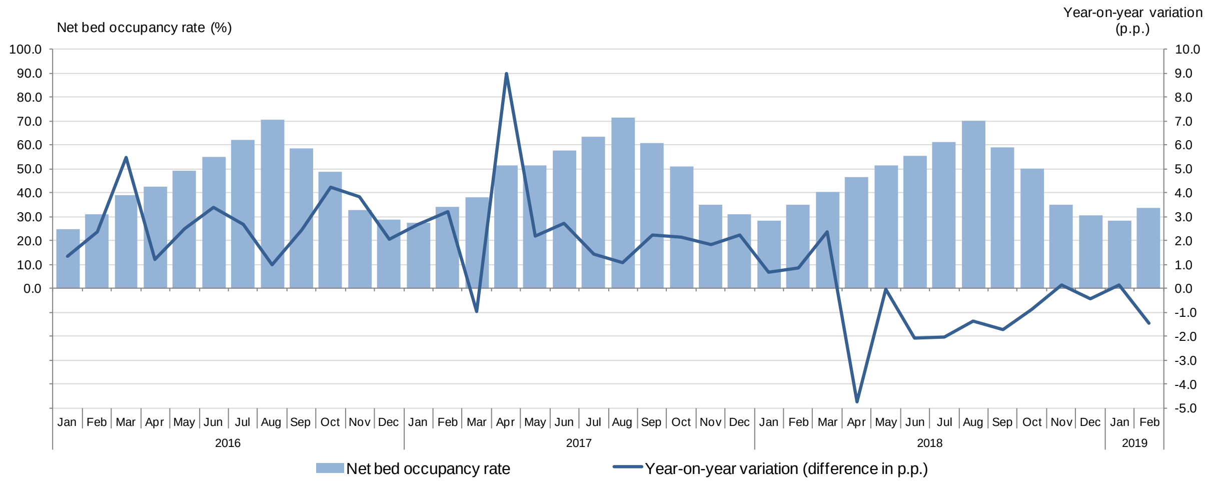
Figure 7. Average stay and net bed occupancy rate in tourism accommodation establishments by NUTS II

NUTS II	Average stay				Occupancy rate			
	Feb 19		Jan - Feb 19		Feb 19		Jan - Feb 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	**2.42**	**-3.80**	**2.41**	**-2.9**	**33.5**	**-1.5**	**30.8**	**-0.7**
Norte	1.69	-2.57	1.69	-1.4	29.7	-1.7	27.8	-0.6
Centro	1.57	-1.71	1.57	0.3	22.3	-1.1	20.5	0.1
MA Lisboa	2.17	-3.51	2.18	-3.1	43.2	-2.6	40.2	-2.1
Alentejo	1.66	-0.27	1.70	3.6	21.6	0.1	20.3	1.6
Algarve	4.04	-8.40	4.00	-7.4	29.3	-0.3	25.5	0.4
AR Açores	2.59	-11.93	2.60	-7.0	28.0	0.0	25.0	0.1
AR Madeira	5.17	-5.28	5.28	-2.5	53.9	-4.7	50.5	-4.2

Reduction in the occupancy rate

In February, the net bed occupancy rate (33.5%) in tourism accommodation establishments decreased by 1.5 p.p. (+0.1 p.p. in January). The highest occupancy rates were recorded in RA Madeira (53.9%) and AM Lisboa (43.2%), although reducing (-4.7 p.p. and -2.6 p.p., respectively).

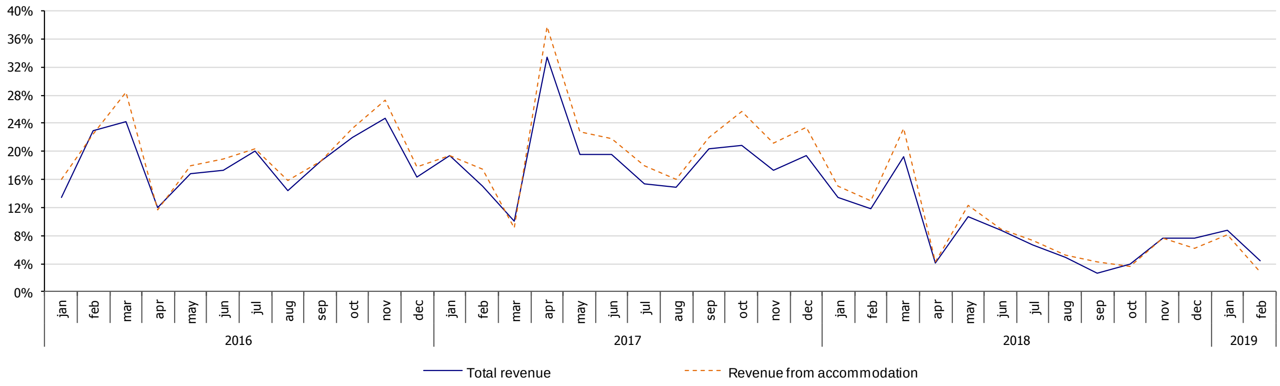
Figure 8. Net bed occupancy rate in tourism accommodation establishments



Deceleration in revenue

Total revenue in tourism accommodation establishments amounted to EUR 172.0 million and revenue from accommodation stood at EUR 119.8 million, corresponding to increases of 4.4% and 2.8%, respectively (+8.8% and +8.1% in January, in the same order).

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



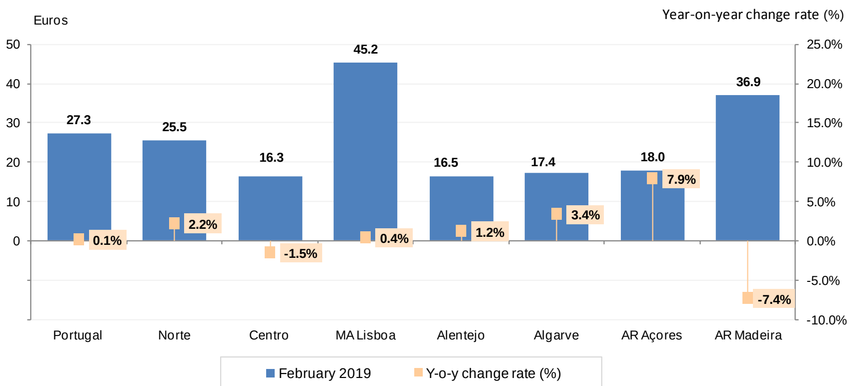
In February, amongst the various regions, the emphasis went to the increases in RA Açores (+15.2% in total revenue and +10.2% in revenue from accommodation) and in the Norte (+10.0% and +8.3%, respectively).

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

NUTS II	Total revenue				Revenue from accommodation			
	Feb 19		Jan - Feb 19		Feb 19		Jan - Feb 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	**172.0**	**4.4**	**334.8**	**6.5**	**119.8**	**2.8**	**234.1**	**5.3**
Norte	27.6	10.0	54.4	11.4	20.3	8.3	40.0	10.6
Centro	16.0	- 1.5	31.6	2.8	11.0	- 1.6	21.3	2.6
Lisboa MA	65.1	5.5	129.5	6.6	47.6	2.6	94.9	4.7
Alentejo	6.4	10.2	12.2	12.5	4.2	2.0	8.0	9.8
Algarve	28.0	7.2	50.2	13.2	18.0	6.0	32.1	9.3
AR Açores	3.7	15.2	6.7	8.6	2.5	10.2	4.6	6.0
AR Madeira	25.0	- 5.3	50.2	-3.5	16.3	- 3.8	33.1	-1.5

In the tourism accommodation establishments, the average revenue per available room (RevPAR) was EUR 27.3 in February, which corresponded to a slight increase of 0.1%. The AM Lisboa accounted for the highest RevPAR (EUR 45.2). As regards this indicator, the emphasis went to the increases in RA Açores (+7.9%) and in the Algarve (+3.4%).

Figure 11. Average revenue per available room in tourism accommodation establishments, by region



The evolution of RevPAR was overall residual (+0.1%), with a 0.3% increase in hotel establishments (although with a reduction of 1.0% in hotels) and a 2.7% growth in local accommodation. In rural/lodging tourism there was a reduction in this indicator (-8.9%). The emphasis goes to the evolution in the tourist villages and tourist apartments (+16.2% and +10.3%, respectively). The set of pousadas and quintas da Madeira and hotels had the highest values in this indicator (EUR 50.1 and EUR 32.4, respectively).

Figure 12. RevPAR in tourism accommodation establishments, by type and category

Type of establishment and category	RevPAR (€)			Year-on-year change rate (%)	
	Feb-18	Feb 19	Jan - Feb 19	Feb 19	Jan - Feb 19
Total	**27.3**	**27.3**	**25.8**	**0.1**	**2.2**
Hotels and similar	**29.7**	**29.8**	**28.1**	**0.3**	**2.4**
Hotels	**32.8**	**32.4**	**30.8**	**-1.0**	**0.8**
*****	52.8	52.9	51.8	0.2	3.8
****	33.7	32.6	30.6	-3.1	- 1.9
***	23.0	23.1	21.5	0.5	1.2
** / *	19.7	19.9	19.0	0.7	2.1
Apartment hotels	**24.5**	**25.0**	**22.9**	**2.1**	**7.0**
*****	33.9	41.0	40.0	20.7	28.4
****	25.7	24.5	22.2	-4.3	0.7
*** / **	17.7	18.6	17.3	5.4	4.7
Pousadas and quintas da Madeira	**54.6**	**50.1**	**46.3**	**-8.3**	**- 3.9**
Tourist apartments	**13.3**	**14.7**	**13.2**	**10.3**	**10.9**
Tourist villages	**14.2**	**16.5**	**14.7**	**16.2**	**13.1**
Local accommodation	**18.1**	**18.5**	**17.5**	**2.7**	**1.7**
Tourism in rural areas and lodging tourism	**13.3**	**12.1**	**11.5**	**-8.9**	**0.2**

Camping sites and holiday camps

In February 2019, camping sites welcomed 54.2 thousand campers (+1.5%) that spent 228.6 thousand overnight stays (+1.2%). The internal market (+5.3%) contributed to the increase in overnight stays, given that the external markets declined by 1.3%. The latter were predominant, representing 60.4% of the total overnight stays. The average stay (4.22 nights) declined by 0.3%.

Holiday camps and youth hostels hosted 17.0 thousand guests (-3.9%) and 31.7 thousand overnight stays (-9.0%). The internal market concentrated 71.3% of the total overnight stays and declined by 11.6%. The external markets declined by 1.8%. The average stay (1.87 nights) decreased by 5.2%.

Accommodation activity – overall view

In February 2019, considering all means of accommodation (tourist accommodation establishments, camping sites and holiday camps and youth hostels), there were 1.4 million guests who spent 3.6 million overnight stays, corresponding to rates of change of +2.8% and -0.9%, respectively (+6.6% and +4.6% in January, in the same order).

Overnight stays of residents decreased by 2.2% (+6.1% in January) and those of non-residents declined by 0.3% (+3.9% in January).

In this global set of accommodation establishments, the average stay (2.48 nights) decreased by 3.6% (-2.3% from residents and -5.2% from non-residents).

Having in consideration the first two months of the year, with regard to all means of accommodation, the number of overnight stays increased by 1.6%, with the contribution of both residents (+1.6%) and non-residents (+1.7%).

Figure 13. Main indicators of accommodation activity

NUTS II		Total				Residents				Non residents			
		Feb 19		Jan - Feb 19		Feb 19		Jan - Feb 19		Feb 19		Jan - Feb 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	**1 436.1**	**2.8**	**2 740.6**	**4.6**	**660.0**	**0.1**	**1 270.9**	**3.1**	**776.1**	**5.2**	**1 469.7**	**5.8**
Tourist accommodation establishments	"	1 365.0	2.9	2 606.6	4.6	618.2	-0.1	1 192.9	2.9	746.8	5.6	1 413.6	6.0
Camping sites	"	54.2	1.5	105.2	5.9	28.7	7.6	55.4	11.3	25.5	-4.6	49.8	0.4
Holiday camps and youth hostels	"	17.0	-3.9	28.9	-1.6	13.2	-6.9	22.6	-2.8	3.8	8.0	6.3	3.1
Overnight stays													
Total	10^3	**3 561.4**	**-0.9**	**6 776.0**	**1.6**	**1 135.1**	**-2.2**	**2 180.1**	**1.6**	**2 426.4**	**-0.3**	**4 595.9**	**1.7**
Tourist accommodation establishments	"	3 301.1	-1.0	6 272.5	1.6	1 021.9	-2.6	1 965.0	1.3	2 279.2	-0.2	4 307.5	1.7
Camping sites	"	228.6	1.2	447.3	3.1	90.5	5.3	174.8	5.8	138.1	-1.3	272.6	1.5
Holiday camps and youth hostels	"	31.7	-9.0	56.2	-2.9	22.6	-11.6	40.3	-3.3	9.1	-1.8	15.9	-1.6
Average stay													
Total	no. Nights	**2.48**	**-3.6**	**2.47**	**-2.8**	**1.72**	**-2.3**	**1.72**	**-1.5**	**3.13**	**-5.2**	**3.13**	**-3.9**
Tourist accommodation establishments	"	2.42	-3.8	2.41	-2.9	1.65	-2.5	1.65	-1.5	3.05	-5.5	3.05	-4.1
Camping sites	"	4.22	-0.3	4.25	-2.6	3.15	-2.1	3.16	-5.0	5.42	3.5	5.47	1.1
Holiday camps and youth hostels	"	1.87	-5.2	1.95	-1.3	1.72	-5.0	1.78	-0.6	2.39	-9.1	2.53	-4.6

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: provisional results; February: 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. 19	-0.2 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 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 May 2019