13 January 2023 TOURIST ACTIVITY November 2022

### NET OCCUPANCY RATES IN TOURIST ACCOMMODATION AT THE SAME LEVEL AS NOVEMBER 2019

In November 2022<sup>1</sup>, the **tourist accommodation sector**<sup>2</sup> registered 1.7 million guests (+19.7%)<sup>3</sup> and 4.2 million overnight stays (+19.4%) corresponding to EUR 288,6 million of total revenue (+36.8%) and EUR 214.2 million of revenue from accommodation (+40.3%). When compared to the same month in 2019, there were increases of 25.5% in total revenue and 29.2% in revenue from accommodation (+27.0% and +27.8% in October, respectively).

The net bed and the net bedroom occupancy rates in tourism accommodation establishments (35.3% and 45.4%, respectively) were similar to the ones registered in November 2019 (35.2% and 45.6%, in the same order).

In November, the revenue per available room (RevPar) stood at EUR 39.8 and the average daily rate (ADR) amounted to EUR 87.6 (+31.4% and +18.1% when compared to November 2021, respectively). Vis-à-vis November 2019, the RevPar increased by 23.8% and the ADR grew by 24.2%.

In November, among the municipalities with the highest representativity in total overnight stays, Lisboa with a recovery compared to 2019 levels and Albufeira which still showed a decrease in overnight stays compared to 2019, stood out, in both cases mostly due to non-residents.

In the **first eleven months of 2022**, total revenue from the tourist accommodation sector grew by 118.2% and revenue from accommodation grew by 120.4% (+16.2% and +17.4%, compared to the same period of 2019, respectively), as a result of 24.9 million guests (+86.6%) and 65.8 million overnight stays (+89.4%).

Considering **all means of accommodation** (tourist accommodation establishments, camping and holiday camps, and youth hostels), in **the first eleven months of 2022**, there were 27.2 million guests and 73.1 million overnight stays, corresponding to increases of 83.6% and 83.5%, respectively. When compared with the same period of 2019, the number of overnight stays decreased by 1.3% (+5.2% concerning residents and -4.6% for non-residents).

<sup>&</sup>lt;sup>1</sup> Statistics Portugal released, on the 30<sup>th</sup> of December, the <u>Tourism activity flash estimate: November 2022</u>, which includes the main indicators (guests, overnight stays, breakdown by residents, non-residents, and main countries). In this press release, some of these indicators are presented with a greater geographical breakdown, and the remaining indicators are usually published monthly - namely occupancy rate, revenue, RevPAR, and ADR - and information on most types of accommodation (including camping and holiday camps and youth hostels) is presented.

<sup>&</sup>lt;sup>2</sup> Monthly series which 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 tourist.

<sup>&</sup>lt;sup>3</sup> Unless stated otherwise, the rates of change presented in this press release correspond to year-on-year rates of change.

Table 1. Global results of the tourist accommodation sector

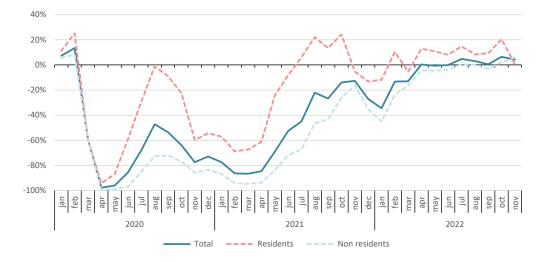
|   |                     | Octo    | ber 2022                     | Nover   | mber 2022                    | Jan - Nov 22 |                              |  |
|---|---------------------|---------|------------------------------|---------|------------------------------|--------------|------------------------------|--|
| Global preliminary results                  | Unit                | Value   | Year-on-year change rate (%) | Value   | Year-on-year change rate (%) | Value        | Year-on-year change rate (%) |  |
| Guests                                      | 10 <sup>3</sup>     | 2 631.0 | 23.6                         | 1 738.4 | 19.7                         | 24 905.0     | 86.6                         |  |
| Residents in Portugal                       | "                   | 977.9   | -1.4                         | 745.4   | 6.1                          | 10 392.0     | 31.6                         |  |
| Residents abroad                            | "                   | 1 653.2 | 45.4                         | 993.0   | 32.5                         | 14 513.0     | 166.5                        |  |
| Overnight stays                             | 10 <sup>3</sup>     | 6 769.5 | 23.8                         | 4 246.1 | 19.4                         | 65 840.4     | 89.4                         |  |
| Residents in Portugal                       | "                   | 1 832.5 | -3.2                         | 1 321.6 | 6.3                          | 21 502.3     | 22.4                         |  |
| Residents abroad                            | "                   | 4 937.0 | 38.0                         | 2 924.4 | 26.4                         | 44 338.2     | 157.7                        |  |
| Average stay                                | no. of nights       | 2.57    | 0.1                          | 2.44    | -0.3                         | 2.64         | 1.5                          |  |
| Residents in Portugal                       | "                   | 1.87    | -1.8                         | 1.77    | 0.2                          | 2.07         | -6.9                         |  |
| Residents abroad                            | "                   | 2.99    | -5.1                         | 2.95    | -4.6                         | 3.06         | -3.3                         |  |
| Net bed occupancy rate                      | %                   | 48.8    | 6.5 p.p.                     | 35.3    | 3.3 p.p.                     | 46.9         | 15.0 p.p.                    |  |
| Net bedroom occupancy rate                  | %                   | 60.3    | 9.2 p.p.                     | 45.4    | 4.6 p.p.                     | 55.4         | 17.7 p.p.                    |  |
| Total revenue                               | EUR 10 <sup>6</sup> | 496.8   | 48.0                         | 288.6   | 36.8                         | 4 751.3      | 118.2                        |  |
| Revenue from accommodation                  | "                   | 370.6   | 50.1                         | 214.2   | 40.3                         | 3 625.3      | 120.4                        |  |
| RevPAR (Average revenue per available room) | EUR                 | 60.8    | 41.7                         | 39.8    | 31.4                         | 58.1         | 72.6                         |  |
| ADR (Average Daily Rate)                    | "                   | 100.8   | 20.1                         | 87.6    | 18.1                         | 104.9        | 17.4                         |  |

Overnight stays from non-residents recorded the highest monthly growth compared to 2019 (+5.9%)

The tourist accommodation sector accounted for 1.7 million guests and 4.2 million overnight stays, in November 2022, corresponding to increases of 19.7% and 19.4%, respectively (+23.6% and +23.8% in October, in the same order). When compared to November 2019, there were variations of -1.0% and +4.3%, respectively.

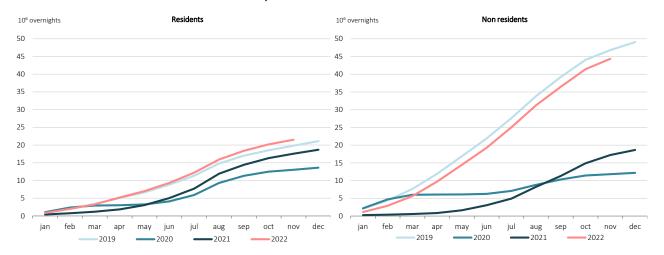
In November, the internal market contributed with 1.3 million overnight stays, and once again registered a positive evolution (+6.3%), after a decrease in October (-3.2%). External markets predominated (68.9% weight) and totalled 2.9 million overnight stays (+26.4%). Comparing with 2019, there were increases of 0.8% in overnight stays from residents and 5.9% from non-residents, which in the latter case corresponds to the highest monthly growth compared to 2019.

Figure 1. Overnight stays in tourist accommodation establishments: year-on-year rate of change compared to 2019



In the first **eleven months of 2022**, overnight stays increased by 89.4% (+22.4% in residents and +157.7% in non-residents). Compared with the same period of 2019, overnight stays decreased by 1.2% (-5.3% in non-residents and +8.4% in residents).

Figure 2. Overnight stays of residents and non-residents in tourist accommodation establishments, by month – cumulative sum



RA Madeira stood out with the highest growth in overnight stays from residents and non-residents

In November, all regions showed positive evolutions in overnight stays compared to the same month of 2021. AM Lisboa accounted for 32.9% of overnight stays, followed by the Algarve and the Norte (17.5% in both).

Compared to November 2019, there were decreases in the Algarve (-5.4%), Centro (-2.3%) and Alentejo (-1.6%). The highest increases occurred in RA Madeira (+24.9%), RA Açores (+8.3%) and AM Lisboa (+5.0%).

In terms of overnight stays from residents, RA Madeira stood out with a growth of 57.1% compared to 2019. The biggest decreases were recorded in Alentejo (-5.8%) and Centro (-5.6%).

Except for Algarve (-6.9%), all other regions recorded increases in overnight stays from non-residents, with emphasis on RA Madeira (+21.0%) and RA Açores (+14.7%) compared to 2019.

Table 2. Overnight stays in tourist accommodation establishments, by NUTS II regions

Unit · 1

|            | Total of overnight stays |                             |              | Overnight stays from residents |         |                             |              | Overnight stays from non residents |         |                             |              |                             |
|------------|--------------------------|-----------------------------|--------------|--------------------------------|---------|-----------------------------|--------------|------------------------------------|---------|-----------------------------|--------------|-----------------------------|
|            | Nov 22                   |                             | Jan - Nov 22 |                                | Nov 22  |                             | Jan - Nov 22 |                                    | Nov 22  |                             | Jan - Nov 22 |                             |
| NUTS II    | Value                    | Y-o-y<br>change<br>rate (%) | Value        | Y-o-y<br>change<br>rate (%)    | Value   | Y-o-y<br>change<br>rate (%) | Value        | Y-o-y<br>change<br>rate (%)        | Value   | Y-o-y<br>change<br>rate (%) | Value        | Y-o-y<br>change<br>rate (%) |
| Portugal   | 4 246.1                  | 19.4                        | 65 840.4     | 89.4                           | 1 321.6 | 6.3                         | 21 502.3     | 22.4                               | 2 924.4 | 26.4                        | 44 338.2     | 157.7                       |
| Norte      | 741.2                    | 18.7                        | 10 822.4     | 92.0                           | 313.1   | 3.7                         | 4 412.4      | 34.6                               | 428.1   | 32.7                        | 6 410.0      | 171.9                       |
| Centro     | 442.3                    | 15.4                        | 6 690.0      | 62.0                           | 277.4   | 2.1                         | 4 095.2      | 32.0                               | 164.9   | 47.7                        | 2 594.7      | 152.6                       |
| AM Lisboa  | 1 394.9                  | 25.5                        | 16 802.6     | 141.7                          | 322.2   | 13.0                        | 3 744.0      | 55.5                               | 1 072.7 | 29.8                        | 13 058.6     | 187.3                       |
| Alentejo   | 168.5                    | 7.6                         | 2 889.8      | 33.5                           | 112.2   | 3.0                         | 1 983.9      | 15.0                               | 56.3    | 18.0                        | 905.9        | 106.3                       |
| Algarve    | 743.1                    | 14.1                        | 18 565.8     | 76.9                           | 142.2   | 0.1                         | 4 840.6      | -5.5                               | 600.9   | 18.0                        | 13 725.2     | 155.2                       |
| RA Açores  | 121.0                    | 12.0                        | 2 295.8      | 65.5                           | 67.7    | -3.9                        | 988.1        | 12.3                               | 53.4    | 41.5                        | 1 307.7      | 158.0                       |
| RA Madeira | 635.1                    | 21.7                        | 7 774.1      | 94.4                           | 86.9    | 38.0                        | 1 438.0      | 37.5                               | 548.2   | 19.5                        | 6 336.1      | 114.6                       |

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Overnight stays from non-residents continued increasing in Lisboa and decreasing in Albufeira, compared to 2019

The municipality of Lisboa accounted for 25.5% of total overnight stays in November 2022 (13.9% of total overnight stays from residents and 30.7% of total overnight stays from non-residents), reaching 1.1 million overnight stays (1.3 million in October, 19.8% of the total). Compared to November 2019, overnight stays increased by 3.2% (-2.0% in residents and +4.4% in non-residents).

Funchal accounted for 10.6% of total overnight stays (449.2 thousand), corresponding to an increase of 23.8% (+66.3% in residents and +19.0% in non-residents) compared to November 2019.

In Porto, there were 338.3 thousand overnight stays (8.0% of the total) in November, 5.2% more than in the same month of 2019 (-0.1% in residents and +6.6% in non-residents).

In Albufeira, 227.7 thousand overnight stays were registered (5.4% of the total), being the municipality with the highest decrease (-21.3%) compared to November 2019 (-16.6% in residents and -22.2% in non-residents).

In the **first eleven months of 2022**, compared to the same period of 2019, there were decreases in overnight stays in Lisboa (-5.2%; -0.5% in residents and -6.1% in non-residents) and in Albufeira (-15.9%; -9.2% in residents and -17.8% in non-residents). In the municipalities of Funchal and Porto, overnight stays increased by 11.8% (+76.8% in residents and +4.0% in non-residents) and by 4.2% (+7.5% in residents and +3,5% in non-residents), respectively.

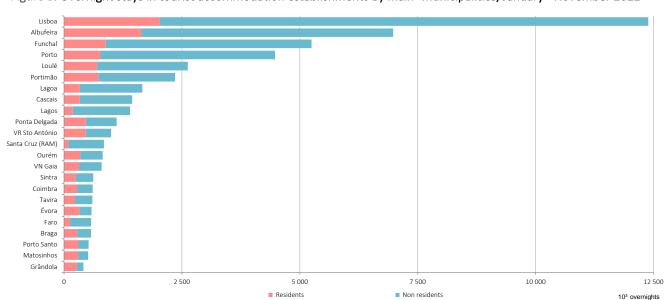


Figure 3. Overnight stays in tourist accommodation establishments by main<sup>4</sup> municipalities, January - November 2022

 $<sup>^{\</sup>rm 4}$  According to the results concerning overnight stays in 2021.

Net occupancy rates close to 2019 levels

The net bed occupancy rate in tourist accommodation establishments (35.3%) increased by 3.3 p.p. in November (+6.5 p.p. in October), compared to the same period of 2021, slightly above the value observed in the same month of 2019 (35.2%).

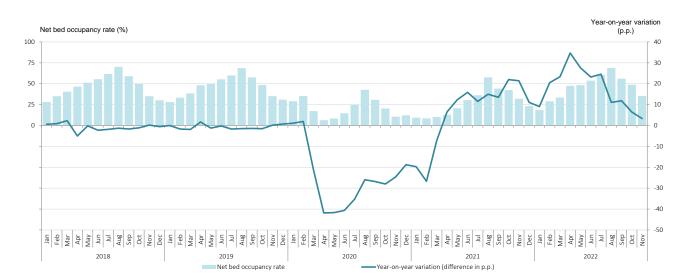


Figure 4. Net bed occupancy rate in tourist accommodation establishments

In November, the highest net bed occupancy rates were recorded in RA Madeira (57.1%) and AM Lisboa (49.1%), where the highest increases were also recorded in this indicator (+4.8 p.p. and +6.4 p.p., respectively). Compared to 2019, there were only increases in the RA Madeira (+8.4 p.p.) and in the RA Açores (+2.1 p.p.).

Table 3. Net bed occupancy rate and net bedroom occupancy rate in tourist accommodation establishments, by NUTS II region

|            | 1    | let bed occ                    | upancy rat | е                            | Net bedroom occupancy rate |                              |              |                              |  |  |
|------------|------|--------------------------------|------------|------------------------------|----------------------------|------------------------------|--------------|------------------------------|--|--|
|            | Nov  | / 22                           | Jan - I    | Nov 22                       | Nov                        | / 22                         | Jan - Nov 22 |                              |  |  |
| NUTS II    | %    | Y-o-y<br>% variation<br>(p.p.) |            | Y-o-y<br>variation<br>(p.p.) | %                          | Y-o-y<br>variation<br>(p.p.) | %            | Y-o-y<br>variation<br>(p.p.) |  |  |
| Portugal   | 35.3 | 3.3                            | 46.9       | 15.0                         | 45.4                       | 4.6                          | 55.4         | 17.7                         |  |  |
| Norte      | 32.5 | 3.1                            | 42.2       | 13.9                         | 40.9                       | 3.7                          | 50.4         | 16.0                         |  |  |
| Centro     | 24.2 | 1.4                            | 32.5       | 7.9                          | 31.2                       | 1.9                          | 39.0         | 9.1                          |  |  |
| AM Lisboa  | 49.1 | 6.4                            | 54.6       | 24.5                         | 65.2                       | 10.1                         | 67.2         | 29.1                         |  |  |
| Alentejo   | 23.0 | -0.1                           | 34.6       | 3.7                          | 30.0                       | -0.2                         | 41.0         | 4.5                          |  |  |
| Algarve    | 26.5 | 1.9                            | 49.2       | 13.7                         | 34.6                       | 1.9                          | 57.0         | 16.5                         |  |  |
| RA Açores  | 28.7 | 1.2                            | 47.0       | 10.9                         | 38.4                       | 3.1                          | 55.1         | 12.7                         |  |  |
| RA Madeira | 57.1 | 4.8                            | 62.4       | 17.2                         | 66.8                       | 6.8                          | 71.2         | 21.0                         |  |  |

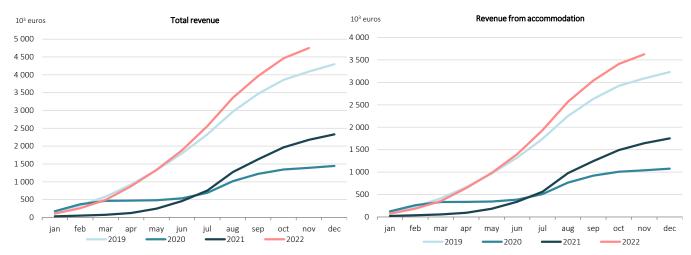
The net bedroom occupancy rate in tourist accommodation establishments (45.4%) increased by 4.6 p.p. in November (+9.2 p.p. in October), slightly below the value recorded in November 2019 (45.6%).

Total revenue remained above 2019 levels, but with a slight slowdown

Total revenue grew by 36.8%, having reached EUR 288.6 million. Revenue from accommodation increased by 40.3%, with a value of EUR 214.2 million. Compared to November 2019, there were increases of 25.5% in total revenue and 29.2% in revenue from accommodation (+27.0% and +27.8% in October, in the same order).

In the **first eleven months of 2022**, total revenue grew by 118.2% and revenue from accommodation increased by 120.4%. Compared with the same period of 2019, there were increases of 16.2% and 17.4%, respectively.

Figure 5. Total revenue and revenue from accommodation in tourist accommodation establishments, by month – cumulative sum



In November, AM Lisboa accounted for 43.7% of total revenue and 47.0% of revenue from accommodation, followed by the Norte (15.9% and 16.0%, respectively), which surpassed the Algarve (13.6% and 11.8%, in the same order).

Table 4. Revenue in tourist accommodation establishments, by NUTS II regions

|            |                              | Total re | evenue              |                             | Revenue from accommodation |                             |                     |                             |  |  |
|------------|------------------------------|----------|---------------------|-----------------------------|----------------------------|-----------------------------|---------------------|-----------------------------|--|--|
|            | Nov 22                       |          | Jan - Nov 22        |                             | Nov 2                      | 22                          | Jan - Nov 22        |                             |  |  |
| NUTS II    | NUTS II  EUR 10 <sup>6</sup> |          | EUR 10 <sup>6</sup> | Y-o-y<br>change<br>rate (%) | EUR 10 <sup>6</sup>        | Y-o-y<br>change<br>rate (%) | EUR 10 <sup>6</sup> | Y-o-y<br>change<br>rate (%) |  |  |
| Portugal   | 288.6                        | 36.8     | 4 751.3             | 118.2                       | 214.2                      | 40.3                        | 3 625.3             | 120.4                       |  |  |
| Norte      | 45.8                         | 28.8     | 725.2               | 126.7                       | 34.4                       | 30.9                        | 566.4               | 133.3                       |  |  |
| Centro     | 23.9                         | 25.9     | 362.3               | 73.8                        | 16.8                       | 24.6                        | 269.8               | 73.4                        |  |  |
| AM Lisboa  | 126.2                        | 57.5     | 1 437.0             | 215.8                       | 100.6                      | 62.4                        | 1 152.3             | 226.3                       |  |  |
| Alentejo   | 10.8                         | 7.3      | 211.7               | 43.7                        | 7.8                        | 11.4                        | 163.2               | 42.2                        |  |  |
| Algarve    | 39.4                         | 20.7     | 1 386.1             | 88.7                        | 25.3                       | 18.4                        | 1 025.1             | 83.2                        |  |  |
| RA Açores  | 6.3                          | 32.2     | 140.2               | 89.2                        | 4.3                        | 23.4                        | 108.8               | 90.4                        |  |  |
| RA Madeira | 36.3                         | 25.6     | 488.8               | 104.9                       | 25.0                       | 30.8                        | 339.7               | 110.4                       |  |  |

In the **first eleven months of 2022**, the evolution of revenue was positive across the three segments of accommodation. When compared with the same period of 2019, total revenue from hotel establishments increased by 14.8% and those from accommodation grew by 16.1% (in the same order, weights of 87.3% and 85.6% in total tourist accommodation). In local accommodation establishments (shares of 8.7% and 10.3%), there were increases of 14.4% and 15.3% and in tourism in rural areas and lodging tourism (representation of 3.9% and 4.1%, respectively) increases reached 64.2% and 61.9%, in the same order.

Table 5. Revenue in tourist accommodation establishments, by segment and by type

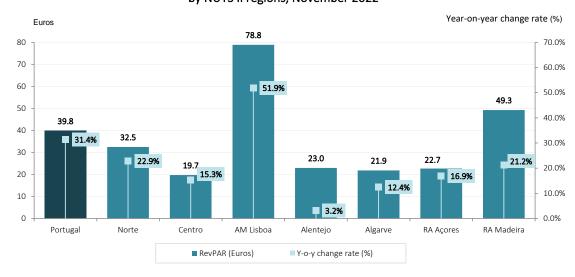
|  |                     | Total re                    | evenue              |                             | Revenue from accommodation |                             |                     |                             |  |  |
|--|---------------------|-----------------------------|---------------------|-----------------------------|----------------------------|-----------------------------|---------------------|-----------------------------|--|--|
|  | Nov 22              |                             | Jan - Nov 22        |                             | Nov 22                     |                             | Jan - Nov 22        |                             |  |  |
| NUTS II                                    | EUR 10 <sup>6</sup> | Y-o-y<br>change<br>rate (%) | EUR 10 <sup>6</sup> | Y-o-y<br>change<br>rate (%) | EUR 10 <sup>6</sup>        | Y-o-y<br>change<br>rate (%) | EUR 10 <sup>6</sup> | Y-o-y<br>change<br>rate (%) |  |  |
| Total                                      | 288.6               | 36.8                        | 4 751.3             | 118.2                       | 214.2                      | 40.3                        | 3 625.3             | 120.4                       |  |  |
| Hotels and similar                         | 253.0               | 36.7                        | 4 149.9             | 121.8                       | 184.0                      | 40.4                        | 3 104.0             | 124.5                       |  |  |
| Hotels                                     | 215.8               | 38.9                        | 3 228.6             | 128.0                       | 157.8                      | 42.4                        | 2 399.5             | 133.7                       |  |  |
| Apartment hotels                           | 19.9                | 25.2                        | 472.3               | 101.4                       | 13.8                       | 35.9                        | 351.0               | 101.3                       |  |  |
| Pousadas and quintas da Madeira            | 5.1                 | 22.8                        | 78.6                | 126.3                       | 3.4                        | 21.7                        | 55.5                | 128.6                       |  |  |
| Tourist apartments                         | 6.9                 | 31.4                        | 211.3               | 108.0                       | 5.8                        | 39.9                        | 180.2               | 104.2                       |  |  |
| Tourist villages                           | 5.3                 | 19.2                        | 159.0               | 89.4                        | 3.3                        | 2.5                         | 117.8               | 70.1                        |  |  |
| Local accommodation                        | 26.3                | 47.1                        | 415.2               | 123.0                       | 23.5                       | 48.9                        | 374.4               | 126.8                       |  |  |
| Tourism in rural areas and lodging tourisn | 9.3                 | 16.7                        | 186.2               | 53.9                        | 6.7                        | 14.6                        | 146.9               | 51.9                        |  |  |

# Average daily rate (ADR) grew by 18.1%, compared to November 2021

When considering all the tourist accommodation establishments, the revenue per available room (RevPAR) amounted to EUR 39.8 in November, having increased by 31.4% compared to November 2021 (+41.7% in October) and 23.8% when compared with the same month in 2019 (+21.2% in October).

The highest RevPAR values were recorded in AM Lisboa (78.8 euros, +51.9%) and RA Madeira (49.3 euros, +21.2%).

Figure 6. Revenue per available room in tourist accommodation establishments, by NUTS II regions, November 2022



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Since the beginning of the year, this indicator increased by 72.6%, growing by 74.6% in hotel establishments, 83.6% in local accommodation, and 18.4% in tourism in rural areas and lodging tourism.

Table 6. RevPAR in tourist accommodation establishments, by type and category

| Type of establishment and category         |        | RevPAR (€) | Year-on-year change rate (%) |        |              |
|--|--------|------------|------------------------------|--------|--------------|
| ,,   | Nov-21 | Nov 22     | Jan - Nov 22                 | Nov 22 | Jan - Nov 22 |
| Total                                      | 30.3   | 39.8       | 58.1                         | 31.4   | 72.6         |
| Hotels and similar                         | 33.0   | 43.9       | 64.0                         | 32.9   | 74.6         |
| Hotels                                     | 36.3   | 48.9       | 65.7                         | 34.8   | 80.0         |
| ****                                       | 65.3   | 82.2       | 115.6                        | 25.9   | 71.8         |
| ***  | 33.5   | 45.8       | 62.2                         | 36.7   | 76.5         |
| ***  | 25.5   | 36.5       | 44.3                         | 43.3   | 87.5         |
| ** / *                                     | 21.1   | 29.5       | 36.0                         | 39.3   | 99.2         |
| Apartment hotels                           | 27.6   | 34.4       | 70.7                         | 24.4   | 45.3         |
| ****                                       | 54.9   | 54.9       | 127.8                        | 0.0    | 25.0         |
| ***  | 23.7   | 31.4       | 63.5                         | 32.4   | 56.3         |
| *** / **                                   | 18.2   | 25.8       | 43.9                         | 41.8   | 20.5         |
| Pousadas and quintas da Madeira            | 53.4   | 58.4       | 88.4                         | 9.3    | 42.1         |
| Tourist apartments                         | 14.8   | 20.0       | 47.4                         | 35.0   | 70.1         |
| Tourist villages                           | 14.6   | 14.8       | 45.7                         | 1.8    | 62.0         |
| Local accommodation                        | 20.2   | 27.1       | 37.8                         | 33.9   | 83.6         |
| Tourism in rural areas and lodging tourism | 20.2   | 20.8       | 37.0                         | 3.3    | 18.4         |

When considering the whole set of tourist accommodation establishments, the average daily rate (ADR) amounted to EUR 87.6 in November, +18.1% vis-à-vis November 2021 (+20.1% in October). When compared to November 2019, the ADR increased by 24.2% (+19.6% in October).

Figure 7. ADR in tourist accommodation establishments, by NUTS II regions, November 2022



### Accommodation activity - overall view

In the first eleven months of 2022, when considering the whole set of means of accommodation (tourist accommodation establishments, camping sites, holiday camps, and youth hostels) there were 27.2 million guests and 73.1 million overnight stays, i.e., increases of 83.6% and 83.5%, respectively. When compared with the same period in 2019, the number of overnight stays decreased by 1.3% (+5.2% for residents and -4.6% for non-residents).

In this set of accommodation establishments, the average stay (2.69 nights) decreased by 0.1% (-6.6% concerning residents and -3.9% for non-residents).

Jan - Nov 22 Jan - Nov 22 Jan - Nov 22 NUTS II Value Value Value Value Value Guests 27 176.5 11 710.6 15 465.9 1 822.4 19.3 83.6 786.3 6.2 30.8 1 036.2 31.7 164.3 Tourist accommodation establishments 1 738.4 19.7 24 905.0 6.1 10 392.0 31.6 32.5 14 513.0 9.2 65.6 1 976.9 48.5 28.8 1 127.4 18.1 849.5 125.5 Camping sites 5.1 0.3 36.7 Holiday camps and youth hostels 18.5 45.6 294 6 130.7 29.3 191 2 94 4 6.4 90.4 103.4 252.4 Overnight stavs 10<sup>3</sup> 4 537.5 73 060.7 1 453.6 25 980.8 47 080.0 153.9 18.7 83.5 6.1 22.1 3 083.9 25.7 Tourist accommodation establishments 21 502.3 157.7 Camping sites 244.1 6 534.0 37.9 107.0 -0.4 4 023.6 16.0 137.0 2 510.5 97.7 47.4 70.1 26.5 175.9 Holiday camps and youth hostels 116.6 231.3 228.1 Average stay no. Nights 2.49 -0.5 3.04 -3.9 2.69 -0.1 1.85 -0.1 2.22 -6.6 2.98 -4.6 Tourist accommodation establishments 3.71 -0.7 Camping sites 3.72 3.31 -7.1 3.57 -1.7 3.73 -12.3 Holiday camps and youth hostels

Table 7. Main indicators of accommodation activity

Overnight stays increased significantly in all means of accommodation

Between January and November 2022, the **tourist accommodation establishments** hosted 24.9 million guests that spent 65.8 million overnight stays, corresponding to increases of 86.6% and 89.4% respectively. Overnight stays of residents increased by 22.4% and those of non-residents grew by 157.7%. In comparison with the same period in 2019, the number of overnight stays decreased by 1.2% (+8.4% concerning residents and -5.3% for non-residents).

The **camping sites** registered 2.0 million campers and 6.5 million overnight stays, in the first eleven months of 2022, corresponding to increases of 48.5% and 37.9%, respectively. Overnight stays from residents increased by 16.0% and those from non-residents grew by 97.7%. Compared to the same period of 2019, overnight stays decreased by 2.7% (-8.1% concerning residents and +7.6% for non-residents). The average stay (3.31 nights) decreased by 7.1% compared with the same period of 2021.

Between January and November 2022, the **holiday camps and youth hostels** welcomed 294.6 thousand guests (+130.7%) that spent 686.3 thousand overnight stays (+116.6%). When compared with the same period of 2019, the number of overnight stays decreased by 0.6% (-7.9% for residents and +17.5% for non-residents). The average stay (2.33 nights) decreased by 6.1% vis-à-vis the same period of 2021.

### **EXPLANATORY NOTES**

In 2020, in the context of the COVID-19 pandemic, Statistics Portugal started to release a flash estimate of tourism activity, anticipating, by 15 days, the dissemination of data on guests and overnight stays in tourist accommodation establishments. The revisions occurring with the publication of later results have not been significant, so from the release of January 2021 data, Statistics Portugal anticipated, by 15 days, the dissemination of preliminary data on tourism activity, thus releasing flash statistics (at 30 days) of the main indicators (guests, overnight stays, with breakdown by residents and non-residents and main countries). The dissemination of results at 45 days is kept, with a greater geographical breakdown, with the remaining indicators - namely occupancy rate, revenue, RevPAR, and ADR - and considering the information on most types of accommodation (including camping and holiday camps and youth hostels).

The sources used in this press release are the Survey on guest stays in hotel establishments and other accommodations, the Survey on guest stays in camping sites, and the 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:

• 2022 – January to October: provisional results; 2022 – 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 with effective responses. These effective responses include situations of suspended activity (seasonal, temporarily for other reasons, or definitive) not duly reported, resulting in the substitution of estimates by a null result, a situation with higher occurrence during the low season.

Guest – Individual that spends at least one overnight stay in a tourist accommodation 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 two beds for each double bed.

**Total revenue** – revenue from the activity of tourist 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.

**ADR** – Average daily rate, measured by the relation between the revenue from accommodation and the number of occupied rooms in the reference period.

Hotels and similar – Includes hotels, apartment hotels, "pousadas", "quintas da Madeira", tourist apartments, and tourist villages.

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Local accommodation – Establishments that provide temporary accommodation services for remuneration but do not meet the requirements to be considered tourist facilities, and may take the form of guest houses, apartments, and lodging establishments (including hostels). Note: Includes pensions, motels, and inns previously classified as other tourist accommodations. Only local accommodation establishments with 10 or more beds are considered according to the statistical threshold set in EU Regulation 692/2011.

**Rural tourist** – 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, and natural legacies of the respective region.

**Lodging tourist** – 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.

Campsites –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.

To simplify the language, the term "foreigner" might be used instead of "non-resident".

## INFORMATION MADE AVAILABLE

With this press release, in addition to the files attached to the press itself, the following indicators are made available on Statistics Portugal's website:

Guests (No.) in tourist accommodation establishments by Geographic localization (NUTS - 2013) and Segment (tourist accommodation establishment); Monthly

Nights (No.) in tourist accommodation establishments by Geographic localization (NUTS - 2013) and Segment (tourist accommodation establishment); Monthly

Total incomes (€) in tourist accommodation establishments by Geographic localization (NUTS - 2013) and Type (tourist accommodation establishment); Monthly

Lodging incomes (€) in tourist accommodation establishments by Geographic localization (NUTS - 2013) and Type (tourist accommodation establishment); Monthly

Further statistical information on Tourism can be found on the Statistics Portugal website.

Date of next flash statistics – 31st of January 2023

Date of next press release – 14<sup>th</sup> of February 2023