

13 February 2014

Tourism activity  
December 2013

## Overnight stays in tourism accommodation accelerated in December

The number of overnight stays in tourism accommodation establishments increased 8.6%<sup>1</sup> in December 2013 (+5.9% than in November 2013). The internal market had a positive contribution (+6.1%), but not as much as the external markets (+10.3%). Considering these markets, it should be noted the substantial increase in overnight stays spent by guests from France, Spain and the USA.

Revenue also increased sharply in December (+11.1% in total revenue and +11.5% in revenue from accommodation) and at a faster pace than in the previous month (+5.6% and +7.2%).

In 2013, tourism accommodation establishments hosted 14.4 million guests (+4.2% than in 2012) and recorded 41.7 million overnight stays (+5.2%). This positive outcome was originated from the external markets (+8.0%), since the number of overnight stays from residents had a slight reduction (-0.9%).

The revenue trend was also positive in 2013 (+5.4% in total revenue and +6.4% in revenue from accommodation), inversely to the year before (-2.6% and -1.3% in 2012).

**Table 1. Global preliminary results from tourism activity**

GLOBAL PRELIMINARY RESULTS	Unit	Month		Accumulated	
		Dec 13	Year-on-year change rate (%)	Jan to Dec 13	Year-on-year change rate (%)
Guests	10 <sup>3</sup>	790.8	9.4	14 431.5	4.2
Overnight stays	10 <sup>3</sup>	1 816.6	8.6	41 732.6	5.2
Residents in Portugal	10 <sup>3</sup>	715.2	6.1	12 309.0	-0.9
Non residents	10 <sup>3</sup>	1 101.5	10.3	29 423.6	8.0
Average stay	No. of nights	2.30	-0.7	2.89	0.9
Net bed occupancy rate	%	23.4	1.9 p.p.	41.2	-1.7 p.p.
Total revenue	10 <sup>6</sup> €	91.5	11.1	1 957.5	5.4
Revenue from accommodation	10 <sup>6</sup> €	58.0	11.5	1 372.8	6.4
RevPAR (Average revenue per available room)	€	16.3	11.0	30.1	5.6

<sup>1</sup> Unless stated otherwise, the change rates presented in this press release were calculated in relation to the same period of the previous year, therefore they should be considered as year-on-year change rates.

## Growth in number of guests and overnight stays

In **December 2013**, tourism accommodation activity establishments hosted 790.8 thousand guests which originated 1.8 million overnight stays. These figures stood for year-on-year increases of 9.4% and 8.6%, respectively, above the results of November (+8.9% and 5.9%).

Overnight stays in hotels grew by 11.5% in December 2013 (+10.4% in November), corresponding to 68.3% of overnight stays spent in tourism accommodation establishments. Worthy to mention is the 22.4% growth in overnight stays spent in "*pousadas*". Tourist apartments (+6.7%) recovered in view of the results of the previous month (-2.3%), but tourist villages kept a year-on-year trend decline (-6.4% in December and -4.8% in November).

**Table 2. Overnight stays by type and category of the establishment**

Type of establishment and category	Overnight stays (10 <sup>3</sup> )		Year-on-year change rate
	Dec-12	Dec-13	%
<b>Total</b>	<b>1 672.7</b>	<b>1 816.6</b>	<b>8.6</b>
<b>Hotels</b>	<b>1 112.4</b>	<b>1 240.5</b>	<b>11.5</b>
*****	189.3	234.8	24.1
****	523.0	565.8	8.2
***	266.3	287.1	7.8
** / *	133.9	152.8	14.1
<b>Apartment hotels</b>	<b>236.4</b>	<b>248.0</b>	<b>4.9</b>
*****	18.9	22.2	17.2
****	153.6	165.6	7.8
*** / **	63.9	60.3	-5.6
<b>Pousadas</b>	<b>17.5</b>	<b>21.4</b>	<b>22.4</b>
<b>Tourist apartments</b>	<b>106.2</b>	<b>113.3</b>	<b>6.7</b>
<b>Tourist villages</b>	<b>57.3</b>	<b>53.7</b>	<b>-6.4</b>
<b>Other tourist establishments</b>	<b>142.9</b>	<b>139.7</b>	<b>-2.2</b>

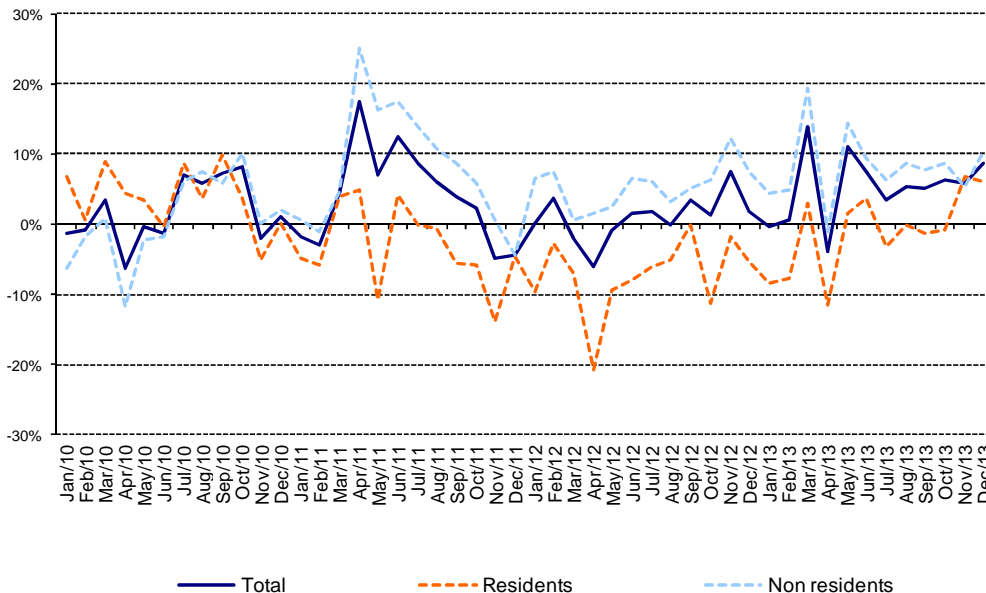
In **2013** (preliminary results), tourism accommodation establishments hosted 14.1 million guests and recorded 41.7 million overnight stays (4.2% more guests and 5.2% more overnight stays than in 2012). These results surpassed the evolution observed in 2012 (-1.1% and +0.6%, respectively), nearing the results of 2011 (+3.4% and +5.5%).

## Overnight stays spent by non residents continued to grow

In **December 2013**, the emphasis went to the 10.3% growth in overnight stays from residents abroad, surpassing the results of November (+5.4%) and the accumulated annual result of 2013 (+8.0%).

Overnight stays spent by residents increased by 6.1% in December, a similar outcome to the one of the previous month (+6.8%).

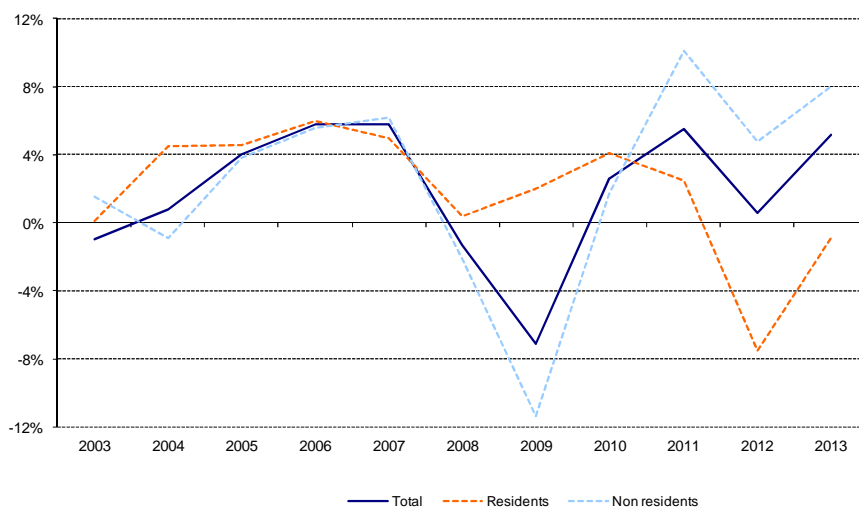
**Figure 1. Overnight stays, month-to-month change rate**



**In 2013**, the number of overnight stays from residents (12.3 million) decrease by 0.9%, with a slowdown of the declining trend of the 2 previous years (-7.5% in 2012 and -2.5% in 2011).

With regard to the external markets, there was a strengthening of the growth trend (+8.0% in 2013 and +4.8% in 2012).

**Figure 2. Overnight stays, annual change rates**



In December 2013, the 10 main inbound markets<sup>2</sup> represented 75.4% of overnight stays from non residents.

For the second consecutive month, the British market (18.3% of overnight stays from non residents) presented declining results (-4.3% in December and -7.7% in November), in spite of the clear positive accumulated results of January to December (+8.6%).

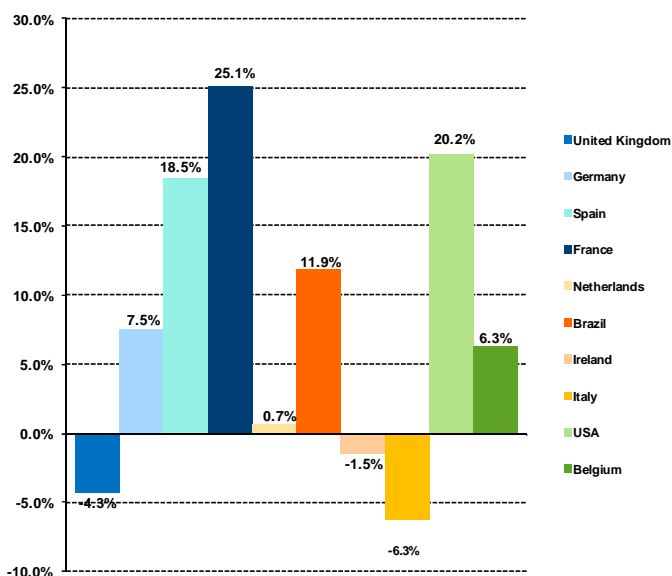
On the contrary, in the last two months, Spain presented relevant year-on-year increases (+18.5% in December and +11.7% in November), but in annual terms it changed slightly from 2012 (+0.7%).

In the month of December as well as in the annual balance of 2013, the performances of the French and USA markets should be mentioned, with increases of 25.1% and 20.2% in December, respectively. Likewise, these two markets accounted for the highest increases amongst the main inbound markets (+14.5% and +16.4%, respectively).

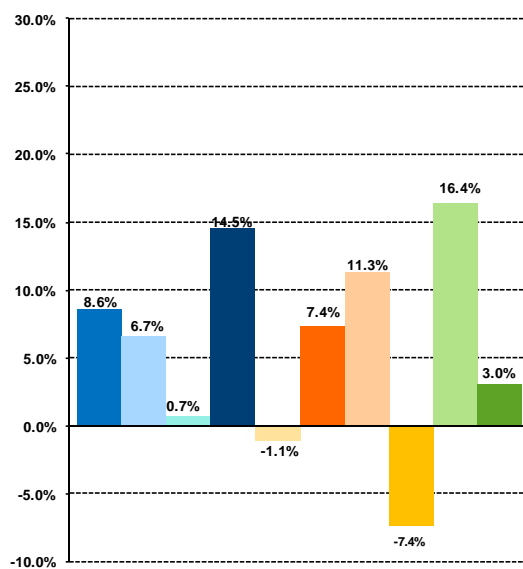
As a result, in 2013, France had an 8.7% weight amongst the inbound markets, only 1.9 p.p. below the relative weight of the Spanish market (-3.1 p.p. in 2012).

**Figure 3. Overnight stays by main inbound markets <sup>(1)</sup> – year-on-year change rates**

**3a. Year-on-year change rate  
December 2013**



**3b. Year-on-year change rate  
January to December 2013**



(1) Main inbound markets according to 2013 overnight stays results (in graphs by descending order)

<sup>2</sup> Based on 2013 results for overnight stays

## Overnight stays increase in all regions

In **December** 2013, all regions accounted for increases in the number of overnight stays, more so the Alentejo with +18.9% (in comparison with -22.0% in December 2012). Lisbon was the most sought after region (30.8% of total overnight stays) and accounted for a year-on-year growth of 11.1%; it is also worth mentioning the high growth rate recorded in Madeira (+13.2%).

In **2013**, there were recoveries particularly from the North, Azores and Madeira (+8.1%, +10.4% and +8.5%, respectively), when compared with overnight stays in 2012 (-0.1%, -7.5% and -1.0%). In Lisbon and Algarve the positive results (+6.6% and +3.5%, respectively) were also above the ones of the previous year (+4.6% and +2.5%). As usual, Algarve was the main destination (35.5% of the total overnight stays from 2013 which stood for 0.6 p.p. less than in 2012), followed by Lisbon (24.1%; +0.3 p.p.) and Madeira (14.3%; +0.4 p.p.).

In **December** 2013, overnight stays from residents increased in all regions, except in the Centre and Azores. However, annual results from **2013** were mostly declining, with only Madeira standing out positively (+9.0%) and the North (+1.5%).

When considering overnight stays spent by non residents, there were increases in all regions in December as well as in 2013 as a whole. In December, the main destinations for non residents were Lisbon (33.9% of overnight stays), Madeira (25.5%) and Algarve (24.0%), while when considering overall results for the year these regions recorded 25.9%, 18.2% and 38.8% of overnight stays, respectively.

**Table 3. Overnight stays by region (NUTS II)**

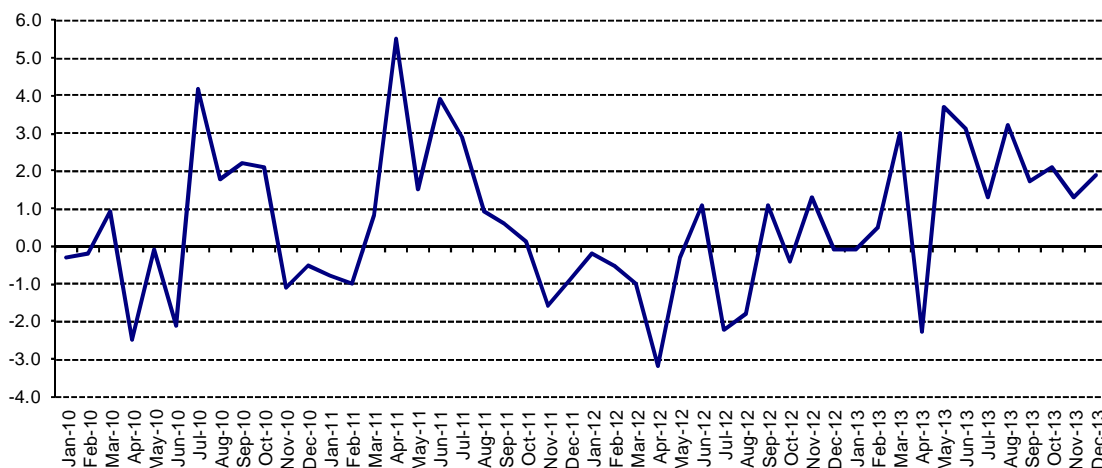
NUTS II	Overnight stays (10 <sup>3</sup> )				Residents overnight stays (10 <sup>3</sup> )				Non residents overnight stays (10 <sup>3</sup> )			
	Dec 13	Year-on-year change rate (%) Dec 13	Jan to Dec 13	Year-on-year change rate (%) Jan-dec 13	Dec 13	Year-on-year change rate (%) Dec 13	Jan to Dec 13	Year-on-year change rate (%) Jan-dec 13	Dec 13	Year-on-year change rate (%) Dec 13	Jan to Dec 13	Year-on-year change rate (%) Jan-dec 13
<b>Portugal</b>	<b>1 816.6</b>	<b>8.6</b>	<b>41 732.6</b>	<b>5.2</b>	<b>715.2</b>	<b>6.1</b>	<b>12 309.0</b>	<b>-0.9</b>	<b>1 101.5</b>	<b>10.3</b>	<b>29 423.6</b>	<b>8.0</b>
North	289.2	11.3	4 908.0	8.1	179.4	6.4	2 409.9	1.5	109.8	20.3	2 498.1	15.2
Centre	203.3	1.6	3 763.9	-0.1	155.9	-3.1	2 252.5	-1.6	47.3	20.8	1 511.3	2.1
Lisbon	559.8	11.1	10 066.6	6.6	186.5	9.9	2 460.5	-0.6	373.3	11.8	7 606.1	9.2
Alentejo	60.8	18.9	1 139.3	-0.2	45.6	13.1	771.1	-2.1	15.1	40.6	368.2	3.8
Algarve	354.7	2.4	14 822.6	3.5	90.8	1.2	3 416.9	-2.9	263.9	2.8	11 405.7	5.5
Azores	27.9	0.4	1 054.1	10.4	16.3	-1.6	374.6	-8.5	11.7	3.3	679.5	24.6
Madeira	320.9	13.2	5 978.1	8.5	40.6	43.8	623.4	9.0	280.3	9.8	5 354.7	8.5

## Slight increase in net bed occupancy rates

In **December** 2013, the net bed occupancy rate in tourism accommodation establishments was 23.4%. It accounted for 1.9 p.p. more than in December 2012.

In **2013**, the net bed occupancy rate was 41.2%, slightly below the one of 2012 (-1.7 p.p.).

**Figure 4. Net bed occupancy rate – year-on-year variation (difference in p.p.)**



The regions of Madeira (39.3%), Lisbon (31.4%) and the North (22.9%) had the highest net bed occupancy rates in December and were also the ones that grew the most (+3.5 p.p. in Madeira, +2.3 p.p. in Lisbon and +2.1 p.p. in the North).

**Table 4. Net bed occupancy rate and average stay, by region**

NUTS II	Occupancy rate			Average stay		
	%		Year-on-year variation (p.p.)	(No. of nights)		Year-on-year change rate (%)
	Dec-12	Dec-13		Dec-12	Dec-13	
<b>Portugal</b>	<b>21.5</b>	<b>23.4</b>	<b>1.9</b>	<b>2.31</b>	<b>2.30</b>	<b>-0.7</b>
North	20.8	22.9	2.1	1.56	1.57	0.5
Centre	16.7	17.6	0.8	1.56	1.57	0.5
Lisbon	29.1	31.4	2.3	2.05	2.07	0.9
Alentejo	14.9	16.8	1.9	1.58	1.65	4.5
Algarve	15.6	16.6	1.0	4.07	3.74	-8.2
Azores	11.1	11.7	0.6	2.37	2.44	2.5
Madeira	35.8	39.3	3.5	5.29	5.05	-4.6

The "*pousadas*" increased the occupancy rate by 5.7 p.p. when compared with December 2012. Apartment hotels and hotels also recorded increases above the national average (+2.5 p.p. and +2.1 p.p., respectively).

**Table 5. Net bed occupancy rate and average stay, by type and category of the establishment**

Type of establishment and category	Occupancy rate			Average stay		
	%		Year-on-year variation (p.p.)	(No. of nights)		Year-on-year change rate (%)
	Dec-12	Dec-13		Dec-12	Dec-13	
<b>Total</b>	<b>21.5</b>	<b>23.4</b>	<b>1.9</b>	<b>2.31</b>	<b>2.30</b>	<b>-0.7</b>
<b>Hotels</b>	<b>24.0</b>	<b>26.1</b>	<b>2.1</b>	<b>2.04</b>	<b>2.05</b>	<b>0.2</b>
*****	26.7	28.7	2.0	2.28	2.29	0.3
****	25.1	27.6	2.5	2.23	2.17	-2.6
***	21.6	22.5	0.9	1.83	1.88	2.4
** / *	21.9	24.7	2.8	1.64	1.70	3.8
<b>Apartment hotels</b>	<b>22.5</b>	<b>24.9</b>	<b>2.5</b>	<b>4.04</b>	<b>3.81</b>	<b>-5.8</b>
*****	26.1	22.9	-3.2	4.70	4.10	-12.8
****	22.1	25.6	3.5	4.13	3.87	-6.1
*** / **	22.5	24.1	1.6	3.70	3.54	-4.4
<b>Pousadas</b>	<b>20.1</b>	<b>25.8</b>	<b>5.7</b>	<b>1.62</b>	<b>1.73</b>	<b>6.6</b>
<b>Tourist apartments</b>	<b>14.0</b>	<b>15.0</b>	<b>0.9</b>	<b>4.64</b>	<b>4.80</b>	<b>3.6</b>
<b>Tourist villages</b>	<b>13.0</b>	<b>12.4</b>	<b>-0.6</b>	<b>3.99</b>	<b>3.96</b>	<b>-0.6</b>
<b>Other tourist establishments</b>	<b>17.9</b>	<b>19.4</b>	<b>1.5</b>	<b>1.99</b>	<b>1.99</b>	<b>-0.1</b>

### Stable results in average stay

In **December** 2013, the average stay was 2.30 nights, close to the one of December 2012 (2.31 nights).

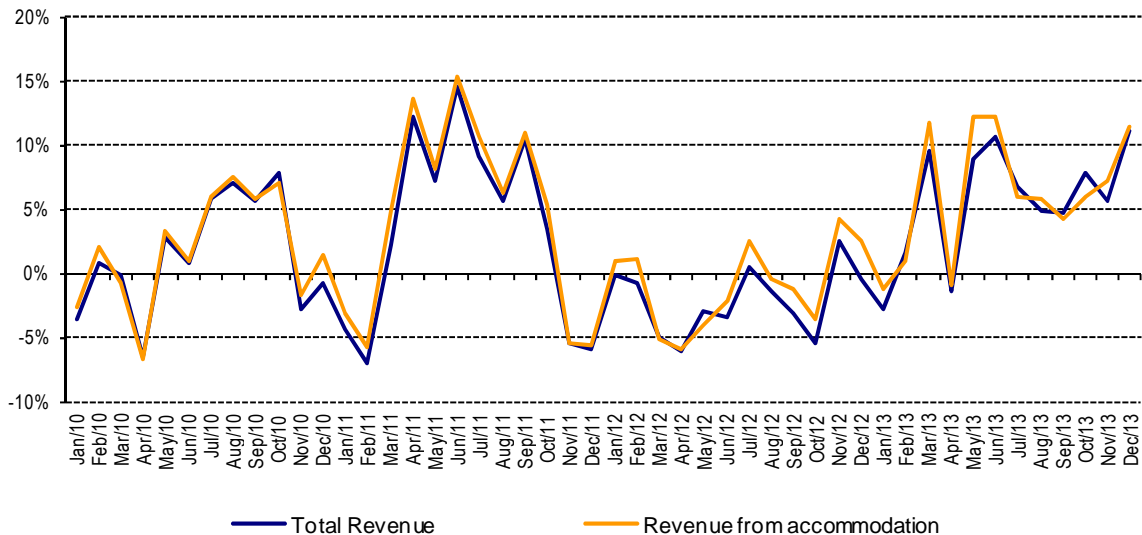
The regions of Madeira and Algarve recorded the highest average stays (5.05 and 3.74 nights) but at the same time, were the only ones to record declines (-4.6% and -8.2%, respectively).

In **2013**, the average stay was 2.89 nights, quite close to the one of the previous year (2.87 nights), while the net bed occupancy rate had a slight decrease (-1.7 p.p., corresponding to 41.2%).

### Increased results in revenue and RevPAR

In **December** 2013, tourist accommodation establishments accounted for EUR 91.5 million in total revenue and EUR 58.0 million in revenue from accommodation. These figures stood for increases, at current prices, of 11.1% and 11.5%, respectively.

**Figure 5. Total revenue and total revenue from accommodation - month-to-month change rate**



In **December**, in terms of the evolution of revenue, the region of Alentejo stood out with increases of 22.5% in total revenue and 20.9% in revenue from accommodation (-21.9% and -18.5% in December 2012), in line with the outcome of overnight stays. Lisbon and Madeira also presented noteworthy results in revenue in December.

In **2013**, total revenue accounted for EUR 1 957.5 million and revenue from accommodation totalled EUR 1 372.8 million. These figures stood for increases of 5.4% and 6.4%, respectively (-2.6% and -1.3% in 2012).

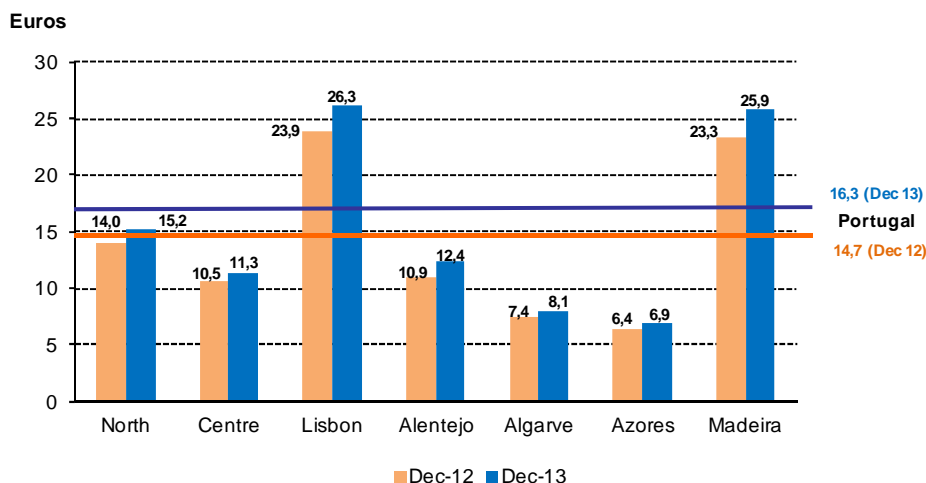
**Table 6. Revenue by region (NUTS II)**

NUTS II	Total revenue (10 <sup>6</sup> euros)		Revenue from accommodation	
	Dec-13	Year-on-year change rate (%)	Dec-13	Year-on-year change rate (%)
<b>Portugal</b>	<b>91.5</b>	<b>11.1</b>	<b>58.0</b>	<b>11.5</b>
North	14.4	7.7	9.2	9.3
Centre	10.7	6.3	6.3	5.6
Lisbon	33.3	14.3	22.5	14.6
Alentejo	3.4	22.5	2.1	20.9
Algarve	11.2	1.9	6.9	4.5
Azores	1.4	1.5	0.8	5.5
Madeira	17.1	17.0	10.3	14.4

In **December** 2013, RevPAR from tourist accommodation activity was EUR 16.3 (+11.0%) while in **2013** it was EUR 30.1, +5.6% than in 2012 (RevPAR in this year had a reduction of 3.5%).



**Figure 6. Average revenue per available room**



For the second month in a row, tourist villages presented an expressive year-on-year increase in RevPAR (+15.1% in December and +24.9% in November). Apartment hotels also presented a significant increase (+13.7%), with all categories contributing, with the exception of 5 star units (-9.0%).

**Table 7. Average revenue per available room, by type and category of the establishment**

Type of establishment and category	RevPAR (€)		Year-on-year change rate
	Dec-12	Dec-13	%
<b>Total</b>	<b>14.7</b>	<b>16.3</b>	<b>11.0</b>
<b>Hotels</b>	<b>17.6</b>	<b>19.2</b>	<b>9.6</b>
*****	31.7	32.9	3.7
****	17.5	19.6	12.2
***	12.5	13.0	3.8
** / *	11.1	12.3	10.4
<b>Apartment hotels</b>	<b>12.6</b>	<b>14.4</b>	<b>13.7</b>
*****	15.8	14.4	-9.0
****	12.9	15.3	18.7
*** / **	11.1	12.0	7.9
<b>Pousadas</b>	<b>21.9</b>	<b>23.5</b>	<b>7.4</b>
<b>Tourist apartments</b>	<b>5.9</b>	<b>6.0</b>	<b>1.1</b>
<b>Tourist villages</b>	<b>7.5</b>	<b>8.6</b>	<b>15.1</b>
<b>Other tourist establishments</b>	<b>9.9</b>	<b>11.0</b>	<b>11.1</b>

## Camping sites and holiday camps

In **December** 2013, camping sites hosted 38.8 thousand campers which originated 150.4 thousand overnight stays. In spite of a 5.6% reduction in the number of campers, the number of overnight stays increased by 4.3%, ascending the average stay to 3.88 nights. For the positive outcome in overnight stays, the contribution of non residents was crucial (+14.9%), since residents declined by 3.2%.

In **2013**, preliminary results from the activity of camping sites were declining. The number of campers stood at 1.6 million (-1.2% than in 2012). The decline in the number of overnight stays was steeper (-10.9%), corresponding to 5.5 million. The average stay was 3.4 nights, below the one of 2012 (3.8 nights).

In **December** 2013, holiday camps and youth hostels hosted 14.7 thousand guests and recorded 27.8 overnight stays. The evolution of these two indicators kept declining (-20.8% in guests and -9.0% in overnight stays). The average stay was 1.89 nights.

Preliminary results from **2013** were equally declining. The number of guests was 373.7 thousand and overnight stays stood at 795.4 thousand, corresponding to decreases of 4.3% and 9.1%, respectively. The average stay was 2.1 nights, below the previous year (2.2 nights).

**Table 8. Camping, holiday camps and youth hostels, by origin of the guests, December 2013**

	Unit	Camping sites				Holiday Camps and Youth Hostels			
		Total	Year-on-year change rate (%) Dec 13	Residents	Non residents	Total	Year-on-year change rate (%) Dec 13	Residents	Non residents
Campers / Guests	10 <sup>3</sup>	38.8	- 5.6	28.5	10.3	14.7	- 20.8	12.1	2.6
Overnight stays	10 <sup>3</sup>	150.4	4.3	82.0	68.5	27.8	- 9.0	22.7	5.1
Average stay	nights	3.88	10.48	2.87	6.67	1.89	14.94	1.87	1.96

## MAIN INBOUND MARKETS

### *The Russian market*

In recent years, demand from the Russian market increased steadily. In 2013, according to preliminary results, it ranked 11<sup>th</sup> in the list of the most important inbound markets, with a 2.0% share.

In 2005, as far as this market is concerned, there was a decline in overnight stays (-30.6%), but in the following years this indicator grew significantly (+35.0% in 2006, +31.8% in 2007 and +27.5% in 2008). The year 2009 accounted for an 18.8% decline, but since then the evolution was always positive (+31.4% in 2010, +45.3% in 2011 and +29.0% in 2012).

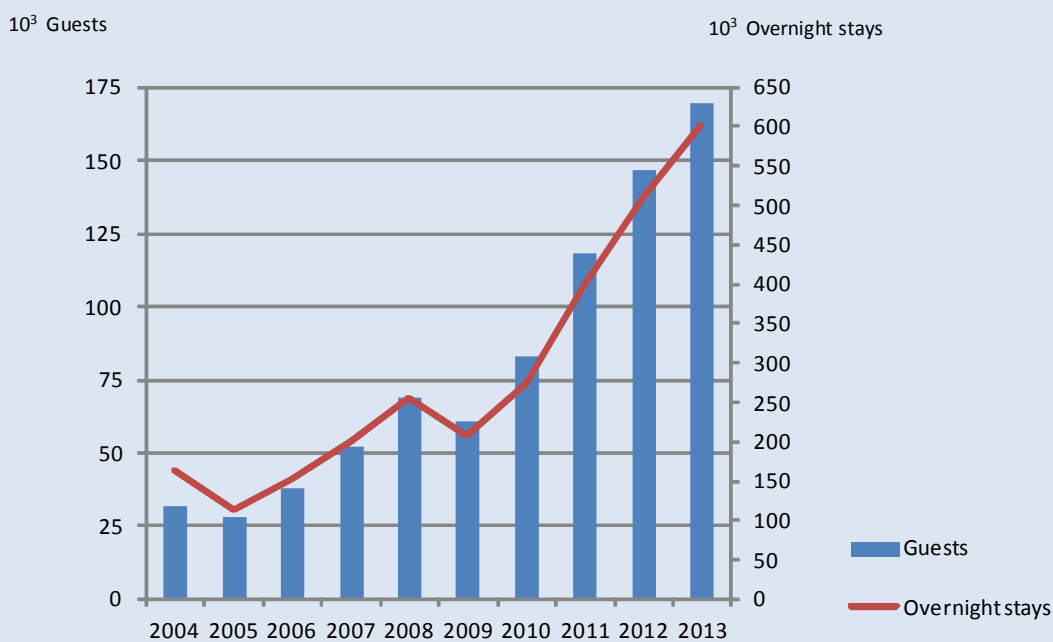
In 2013, tourism accommodation establishments hosted 169.4 thousand clients from Russia which in turn spent 602.0 overnight stays (+15.5% and +17.9% than 2012). The average stay was 3.55 nights.

Demand was mostly focussed in Lisbon (43.3% of overnight stays from this market), Madeira (23.6%) and Algarve (17.6%). The longest stays occurred in Madeira (6.44 nights, on average) and in Algarve (5.31 nights).

Hotels concentrated 69.7% of overnight stays from this market, mostly in 4 star units (48.3% of overnight stays in hotels) and 5 star units (26.4%). Apartment hotels followed (15.5%), with an average stay of 5.15 nights.

More than half of overnight stays from this market (56.8%) occurred in the period June to September, with the month of August as the most sought after (17.7%).

### Evolution of guests and overnight stays from the Russian market



## EXPLANATORY NOTES

Data disseminated in this "Press Release" refers to the following data outputs:

2013 – November and December– preliminary data; January to October – provisional data.

2012 – January to December – final data

Data refers to tourism accommodation establishments in operation, in each reference period.

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, including situations of temporary suspended activity not duly reported. The degree of revision, measured by the difference in percentage points from the year-on-year change rates of provisional versus preliminary data is as follows:

	Overnight stays	Revenue from accommodation
Jan to Oct 13	-0.33 p.p.	-0.07 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.

**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 do not correspond to the sum of the parcels.

## ABBREVIATIONS

RevPAR – Revenue per Available Room

**Date of next press release:** 19 March 2014