



travelBI

by Turismo de Portugal

Tourism in Alentejo 2021

Alentejo | Supply Indicators - 2021



Establishments

744

10,9%

Change 21/20

6,6%

CAGR 21/17



Rooms

11,7 K

7,8%

Change 21/20

3,6%

CAGR 21/17



Beds

25,3 K

6,9%

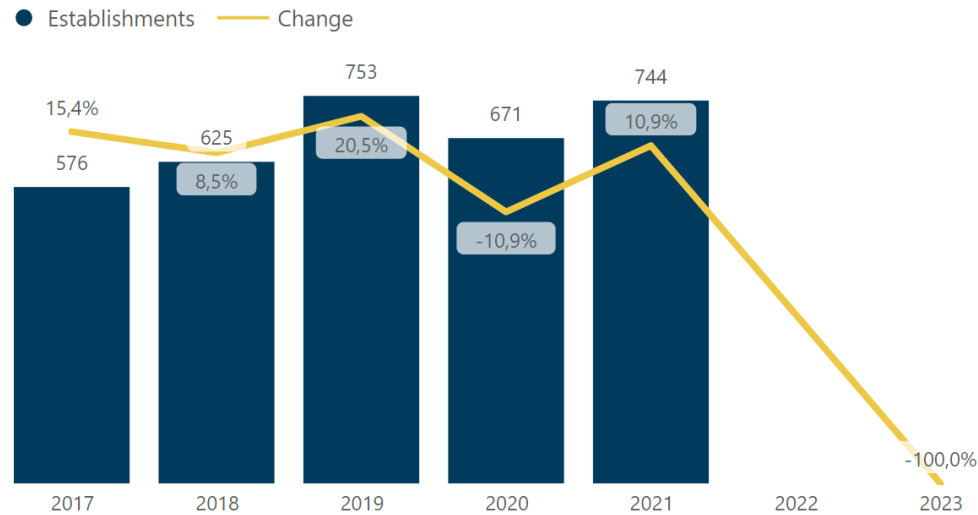
Change 21/20

2,6%

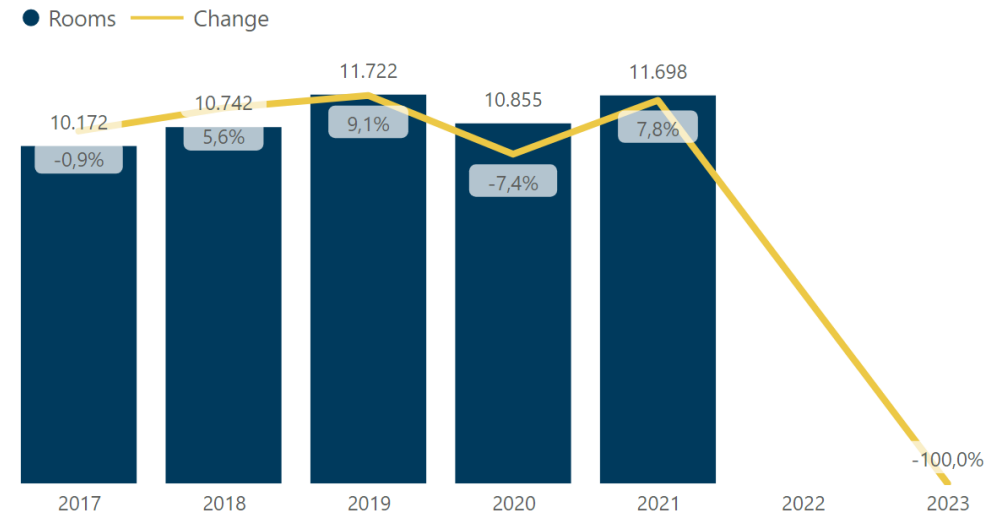
CAGR 21/17

Alentejo | Supply

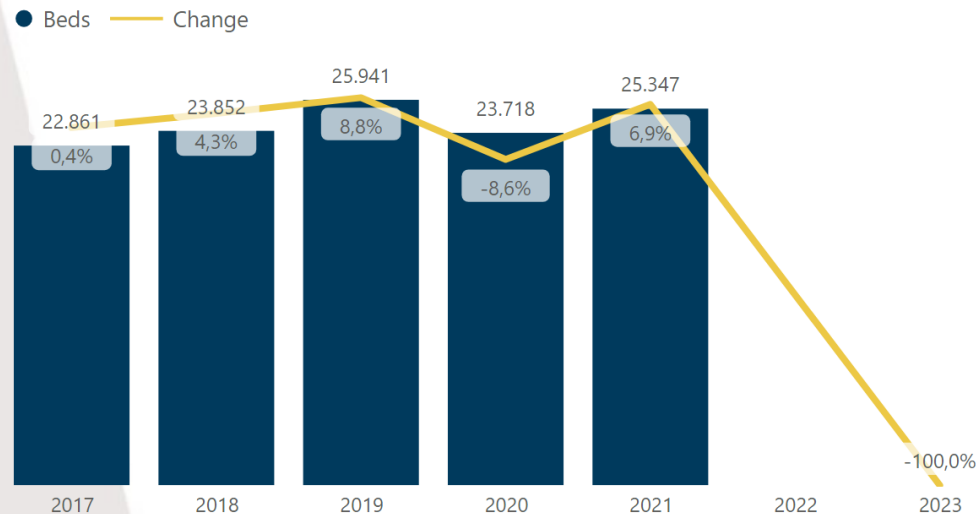
Establishments (unit - July)



Rooms (unit - July)









Beds (unit - July)



Alentejo was one of the regions where the impact of the Covid-19 pandemic was less intense. The year 2021 was almost at the level of 2019, the pre-pandemic year, with regard to the hotel offer:

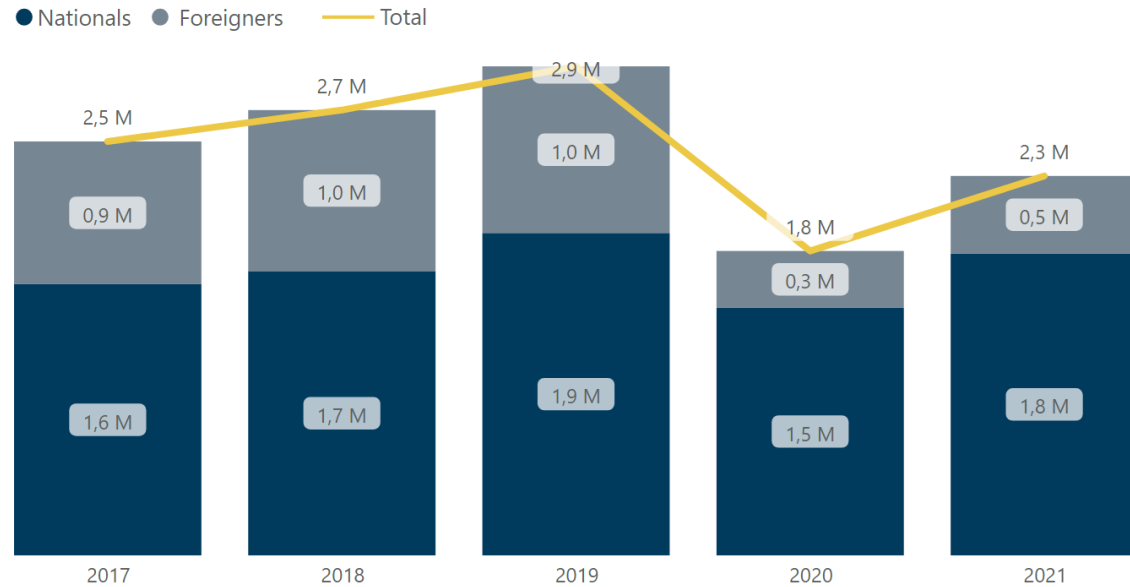
- 744 establishments (+11% compared to 2020, but only -1% compared to 2019);
- 11,698 rooms (+8% compared to 2020 and only -0.2% compared to 2019);
- 25,347 beds (+7% compared to 2020, but only -2% compared to 2019).

Alentejo | Demand Indicators - 2021

 Overnight Stays	 Guest	 Seasonality	 Bed Occupancy Rate	 Room Occupancy Rate	 Average Stay
2,3 M	1,1 M	48,2%	30,0%	39,5%	2,0 noites
24,6% Change 21/20	25,8% Change 21/20	-3.1 p.p. Change 21/20	6 p.p. Change 21/20	8.6 p.p. Change 21/20	0,0 noites Change 21/20
-2,2% CAGR 21/17	-4,9% CAGR 21/17	6.3 p.p. Change 21/17	-10.5 p.p. Change 21/17	-12.5 p.p. Change 21/17	0,1 noites Change 21/17

Alentejo | Overnight Stays

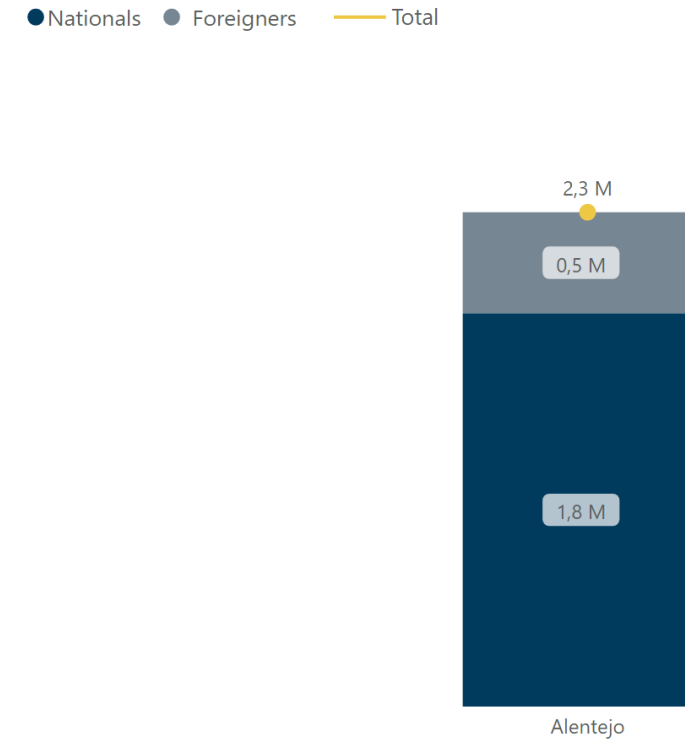
Overnights Stays [million]



Change 21/20

21,9% **Nationals** 36,6% **Foreigners** 24,6% **Total**

Overnight stays 2021 by NUTS II [millions]



In 2021, 80% of overnight stays recorded in Alentejo were from residents in Portugal (66% in 2019), that is, residents who were prevented from traveling abroad, due to measures imposed by various governments to curb the spread of Covid -19, many chose the Alentejo to spend a few days of leisure. Thus, the following was recorded:

- 2.3 million overnight stays, of which 1.8 million were residents and 465.7 thousand non-residents. In global terms, there were 450.8 thousand more overnight stays, compared to 2020 (+25%), but 658.7 thousand less than in 2019 (-22%);
- Residents increased by 22% compared to 2020 (-6% compared to 2019) and non-residents by 37% (-53% compared to 2019).

The Alentejo region was the 5th largest in the country in terms of the number of overnight stays spent by residents (10% of the total overnight stays spent by residents) and the 7th, compared to non-residents (2% of the total overnight stays spent by non-residents in the country).

The region's performance, in times of a pandemic, had to do with the preponderance of residents that usually characterizes it:

- 2019 → 66%
- 2020 → 81%
- 2021 → 80%

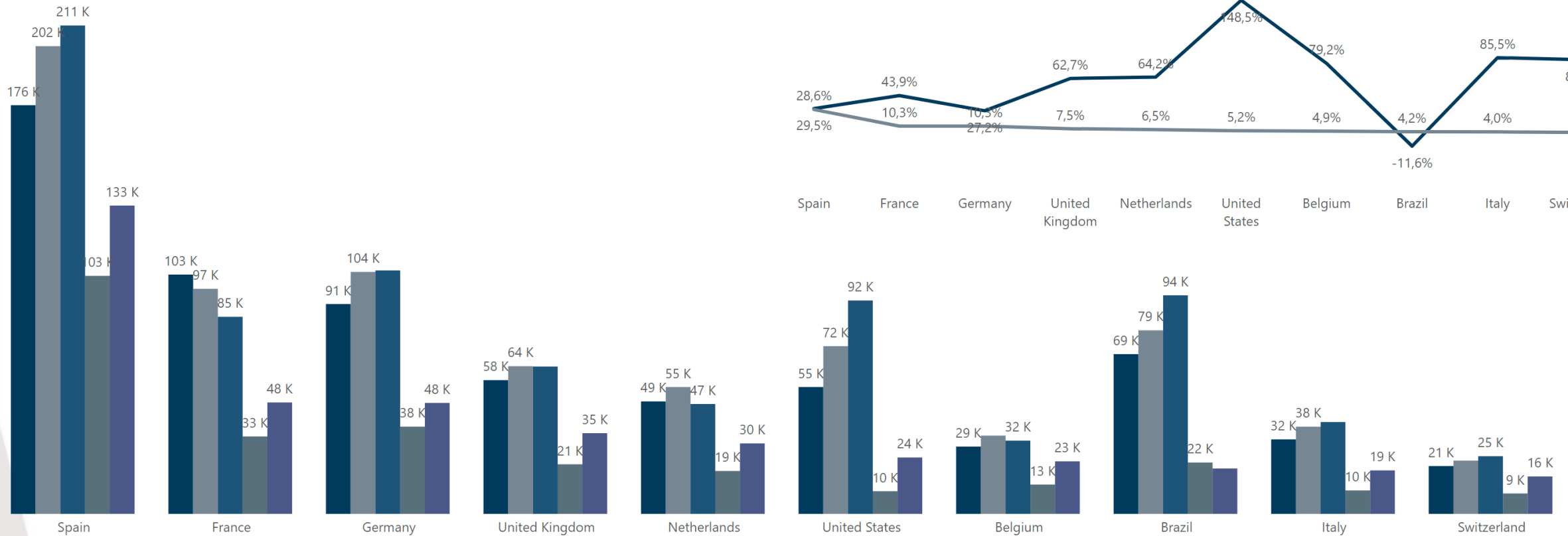
Alentejo | Overnight Stays - 2021



Alentejo | Overnight Stays

Top 10 Overnight Stays – Source Markets [million]

● 2017 ● 2018 ● 2019 ● 2020 ● 2021



In 2021, the group of foreign markets that made up the TOP 10 represented 81% of total external demand (78% in 2020 and 79% in 2019).

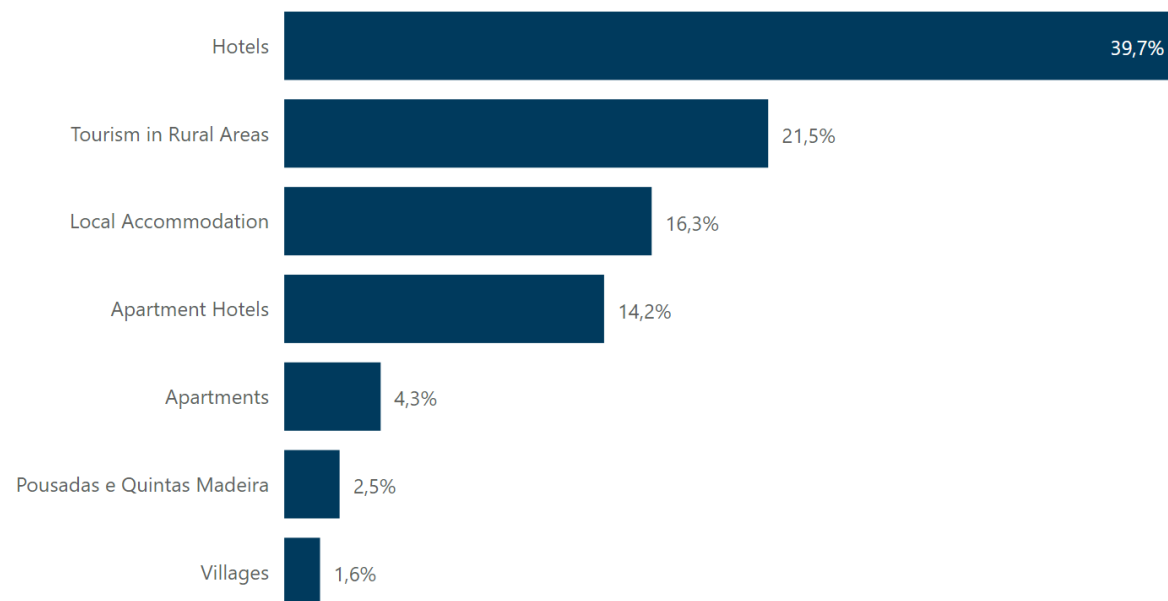
There were changes in the positions of some markets compared to 2020: France and Germany swap positions, Brazil drops 4 places, the United Kingdom and the Netherlands rise 1 place each, the USA rises 3 places and Italy drops 1 position.

It should be noted that Switzerland, now ranked 10th, did not enter the TOP 10 of 2019; that place belonged to China.

All these markets recorded increases compared to 2020, with the exception of Brazil (-12%). In relation to 2019, all of them still presented decreases greater than, for the most part, 43%.

Alentejo | Overnight Stays

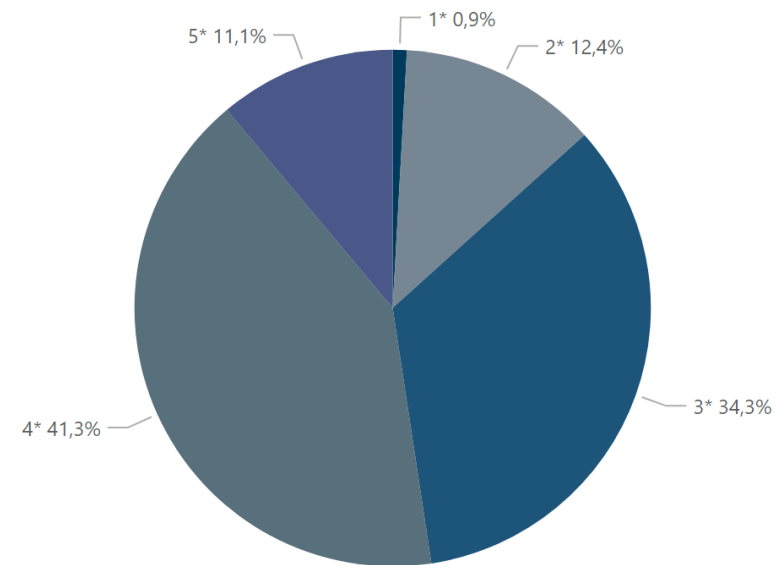
Share of overnight stays in 2021 by type



Hotels were the preferred typology of tourists staying in Alentejo accommodation units in 2021.

40% of overnight stays were in hotels; tourism in rural areas followed with 22% of overnight stays and local accommodation ranked 3rd with 16%.

Share of hotel categories in 2021



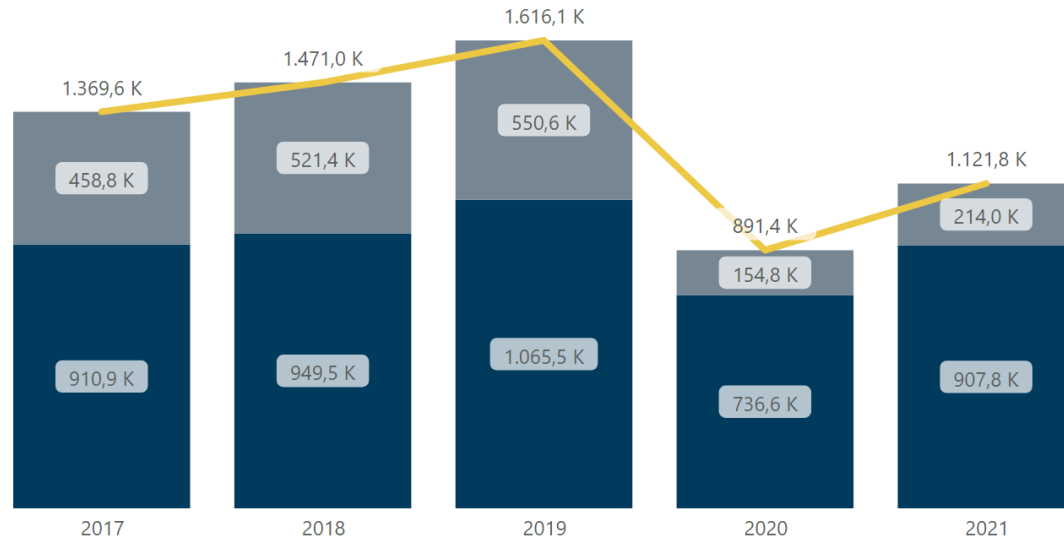
In the "hotel" category, 4* hotels recorded the highest number of overnight stays (41%), followed by 3* hotels with 34% and 2* hotels with 12% of demand.

This distribution has shown homogeneity over the last few years. In 2019, the pre-pandemic year, 4* hotels recorded a 49% share of overnight stays and 3* hotels 22%. That year, the 3rd position was occupied by 5* hotels with a 19% share.

Alentejo | Guests

Guests [thousands]

● Nationals ● Foreigners — Total



Change 21/20

23,2%
Nationals

38,2%
Foreigners

25,8%
Total

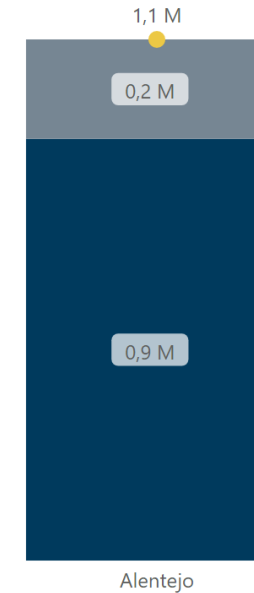
When the reference is guests, and 2021 being a year that showed recovery, it appears that resident guests maintained the level of demand in the region.

Of the 2.7 million guests, 1.4 million were residents and 1.3 million were non-residents. In global terms, there were 733.3 thousand more guests, compared to 2020 (+37%), but 2.3 million less than in 2019 (-46%);

- Residents increased by 31% compared to 2020 (-5% compared to 2019) and non-residents by 44% (-63% compared to 2019).

Guests 2021 by NUTS II [millions]

● Nationals ● Foreigners — Total

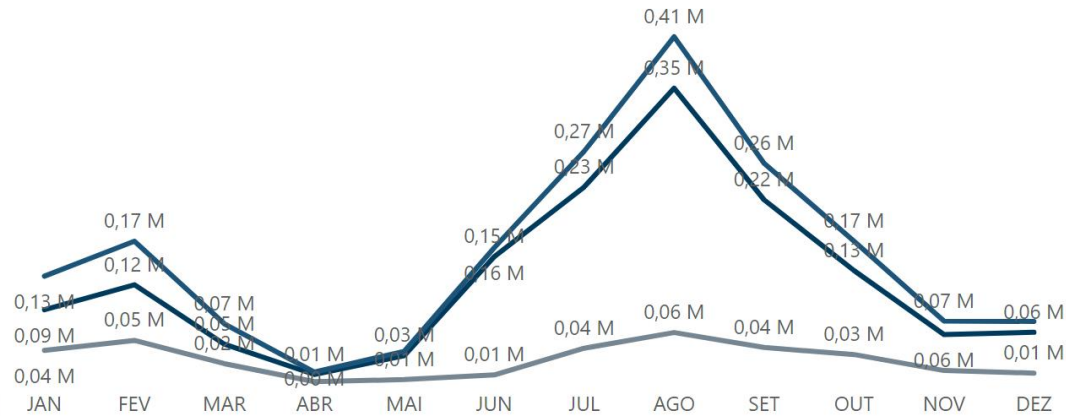


The Alentejo was, in 2021, the 5th region with the highest number of resident guests (11% of total resident guests in the country) and the 6th, when the reference is non-resident guests (4% of total guests non-residents of the country).

Alentejo | Seasonality

Overnight stays 2020 [millions]

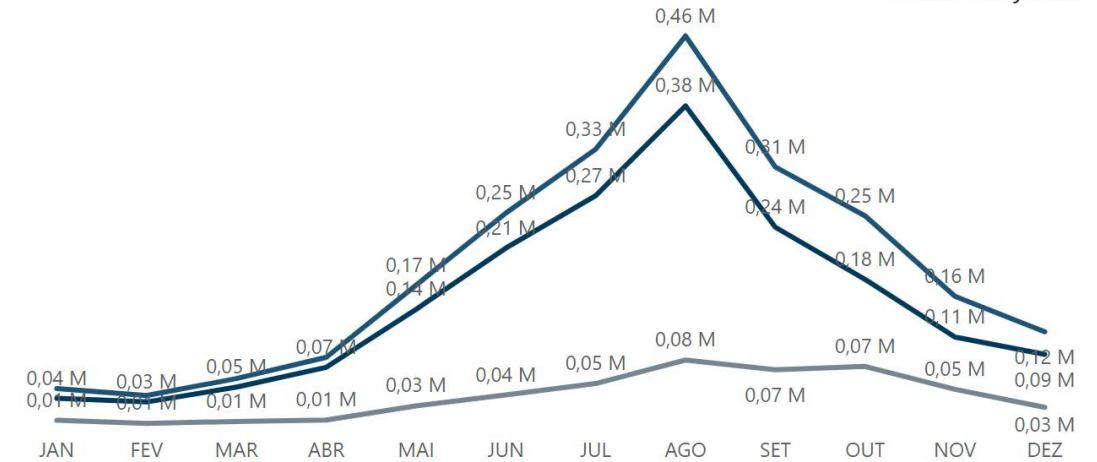
● Nationals ● Foreigners ● Total



51,3%
Seasonality Rate

Overnight stays 2021 [millions]

● Nationals ● Foreigners ● Total



48,2%
Seasonality Rate

As already mentioned, the pandemic experienced in 2020 and 2021 considerably worsened the estimated seasonality indices.

The numbers show this reality, as the value of 2021 is still far from 2019. +8.3 p.p. in the seasonality rate, separate these two years.

Of the 39.9% seasonality rate recorded in Alentejo in 2019, the year 2020 ended with 51.3% (+11.4 p.p.). This increase happened because the residents who were predominant in the region, took advantage of the suspension of some restrictions in the high season, to enjoy their holidays.

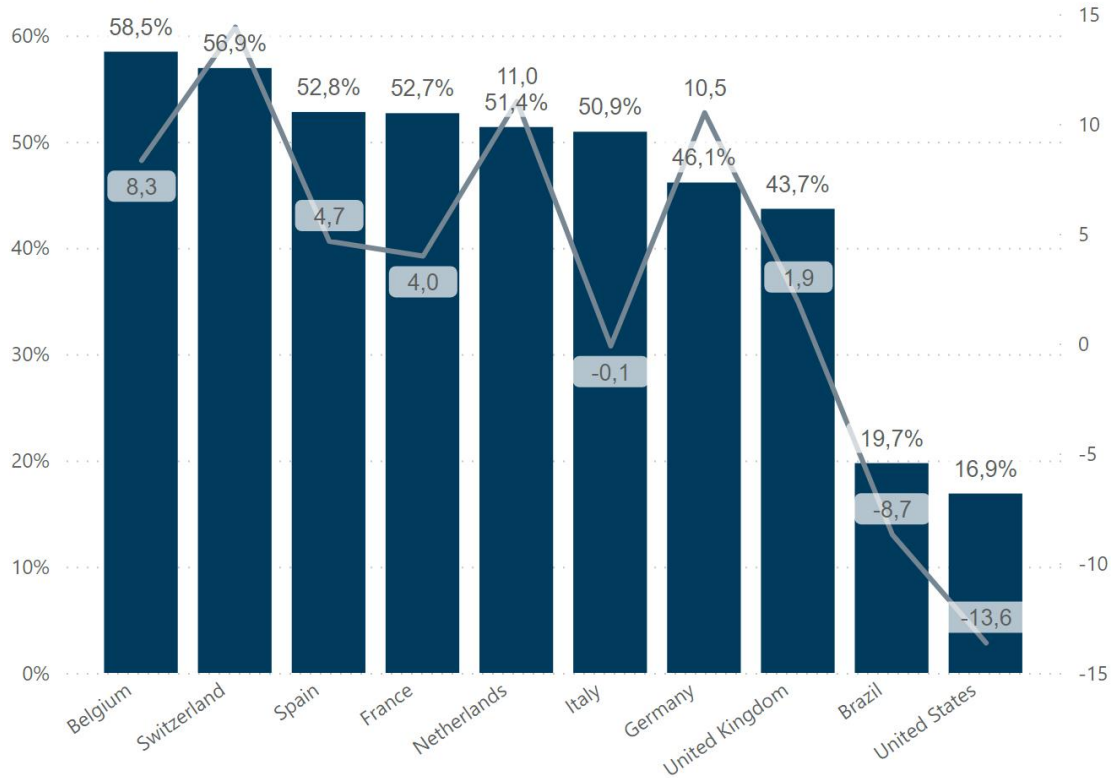
In 2021, with some restrictions lifted throughout the year, the global seasonality rate dropped slightly compared to 2020 (-3.1 p.p.).

Note: concentration of overnight stays in the months of July, August and September)

Source: INE - Instituto Nacional de Estatística (definitive data)

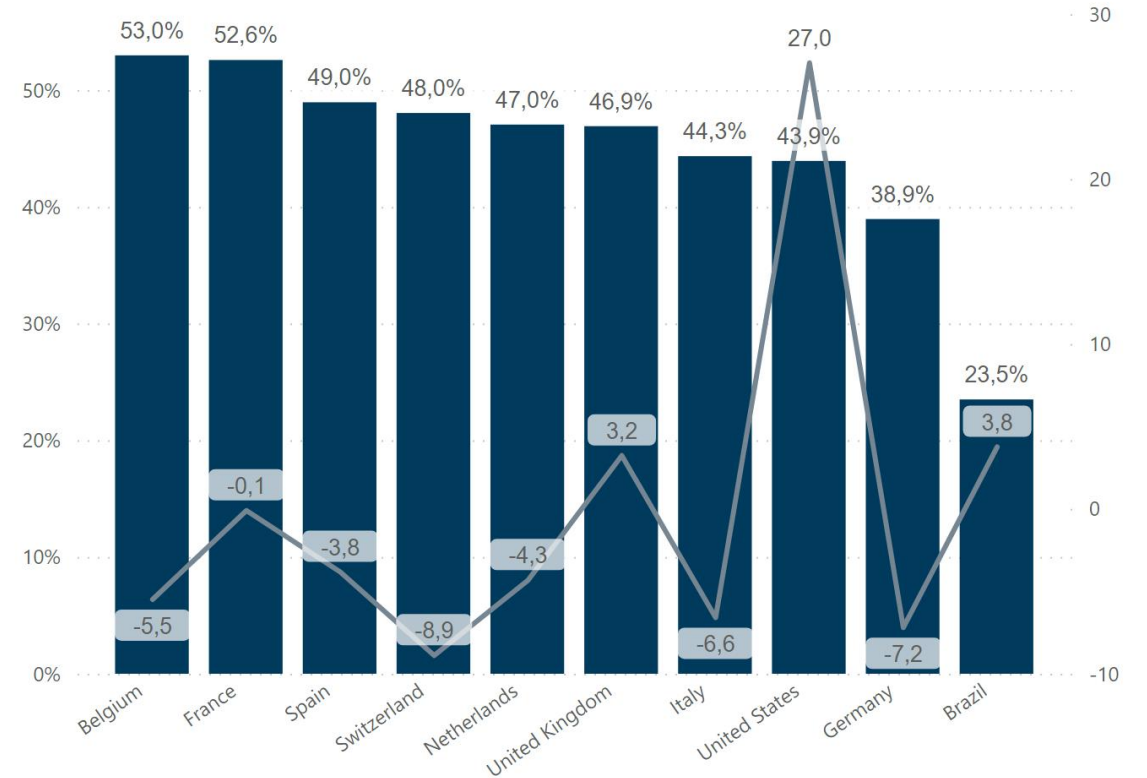
Alentejo | Seasonality

Seasonality Rate by market in the year 2020



From the point of view of the TOP 10, in relation to the seasonality rate, the values reached unexpected dimensions, given that 2020 was a year that was very conditioned in the movement of people, inside and outside the country.

Seasonality Rate by market in the year 2021



Considering some of the main markets, in terms of usual demand for the region, the situation in 2021 was as follows:

- Spain, increased from 48.1% in 2019 to 49.0% in 2021;
- Germany, 35.6% in 2019 and 38.9% in 2021;
- USA, 30.5% vs 43.9%;
- France, 48.7% vs 52.6%;
- Netherlands, 40.3% vs 47.0%.

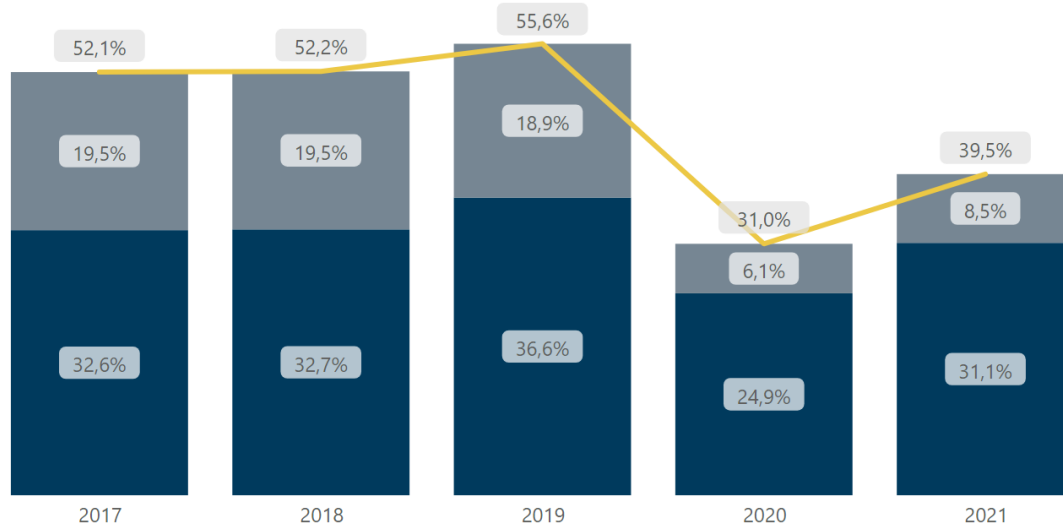
Note: concentration of overnight stays in the months of July, August and September)

Source: INE - Instituto Nacional de Estatística (definitive data)

Alentejo | Occupancy Rates

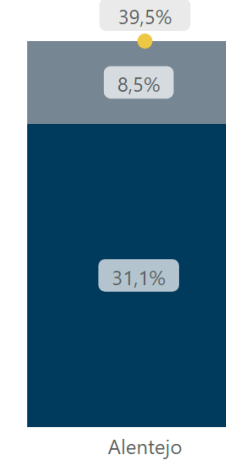
Room Occupancy Rate (ROR) [%]

● Nationals ● Foreigners ● Total



Room Occupancy Rate (ROR) [%]

● Nationals ● Foreigners ● Total



The temporal analysis of the Room Occupancy Rates indicator shows the impact of the pandemic in the region.

The years 2020 and 2021 saw declines in occupancy, with greater incidence in foreign guests (from 18.9% of room occupancy in 2019, it dropped to 8.5% in 2021, i.e. a decrease of 10.4 p.p.).

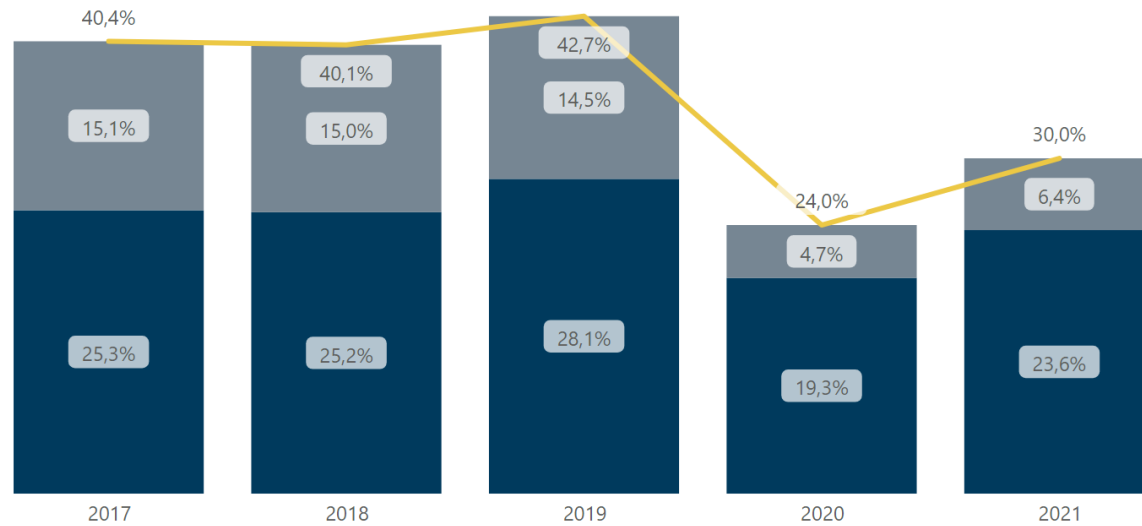
With regard to the Portuguese, many of whom opted to take their holidays in the region, there was a slight decrease (-5.5 p.p.). From 36.6% in 2019 to 31.1% in 2021.

The Alentejo, which in 2019 was the 6th region with the highest occupancy rate (55.6%), rose, in 2021, to 4th position, with 39.5%, although with a decrease of 16,1 p.p. between the two years.

Alentejo | Occupancy Rates

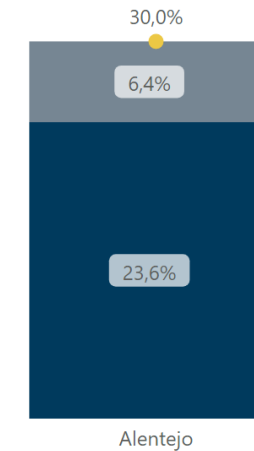
Bed Occupancy Rate (BOR) [%]

● Nationals ● Foreigners ● Total



Bed Occupancy Rate (BOR) [%]

● Nationals ● Foreigners ● Total



As on the previous slide, regarding the room occupancy rate, the years 2020 and 2021 also showed drops in bed occupancy, with greater incidence in guests from abroad (from 14.5% of bed occupancy in 2019, it went down to 6.4% in 2021, that is, a decrease of 8.1 p.p.).

Regarding Portuguese guests, the decline between the two years was lower: from 28.1% bed occupancy in 2019 to 23.6% in 2021, a decrease of 4.5 p.p..

Alentejo, which registered the 6th highest bed occupancy rate with 42.7% in 2019, rose to 3rd position in 2021, albeit with a lower rate (30.0%), i.e. 12 less ,7 p.p..

Alentejo | Profitability Indicators - 2021



Total Revenue

154,9 M

37,3%

Change 21/20

4,0%

CAGR 21/17



Room Revenue

119,8 M

36,5%

Change 21/20

5,6%

CAGR 21/17



RevPar

33,63 €

23,9%

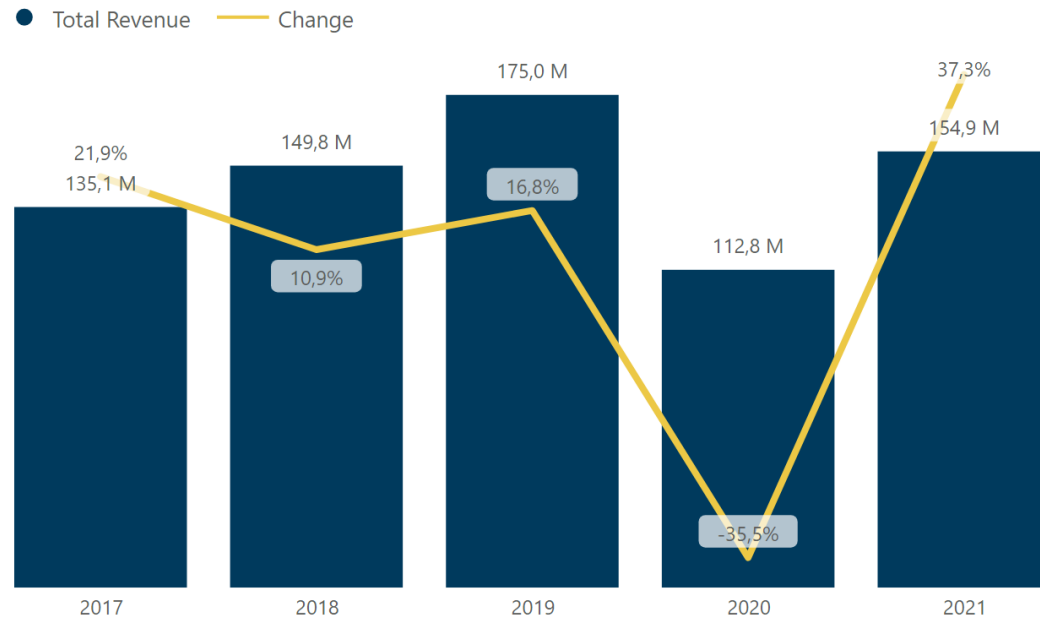
Change 21/20

4,4%

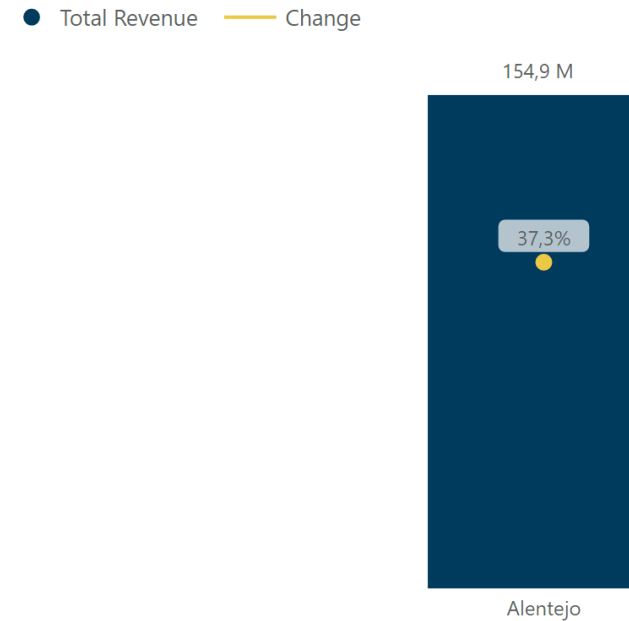
CAGR 21/17

Alentejo | Total Revenue

Total Revenue [million €]



Total Revenue [million €] by NUTS II



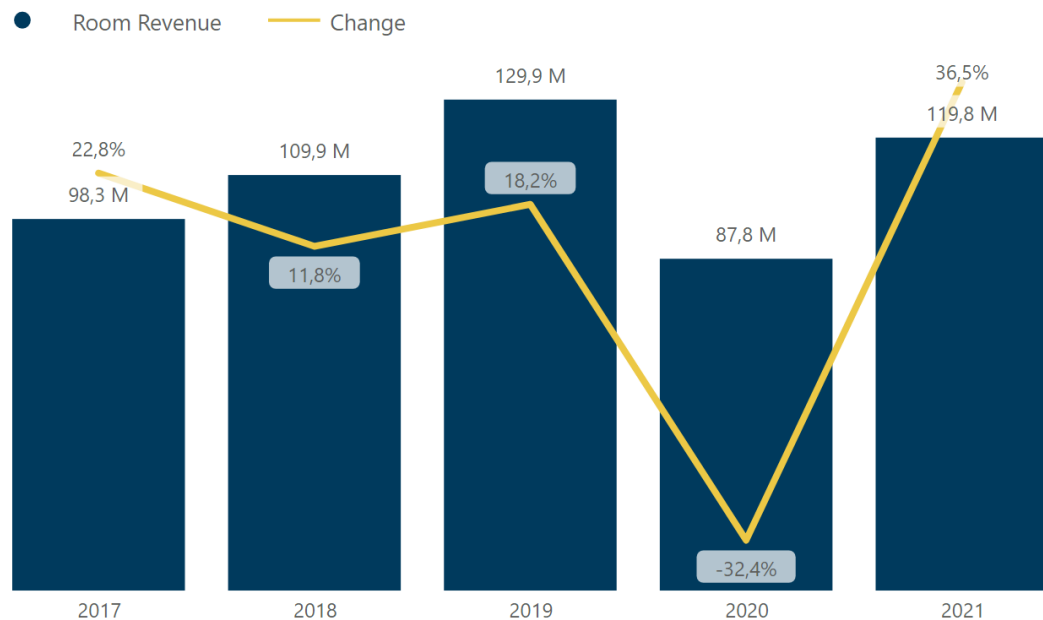
Global revenue from accommodation units in the Alentejo region decreased by 36% in 2020, due to the Covid-19 pandemic, but recovered well in 2021, with the amount rising to €154.9 million, which resulted in an increase of 37% (plus €42.0 million).

If we evaluate the drop seen compared to 2019 (pre-pandemic year), the accommodation units earned €20.1 million less in global revenue (-11%).

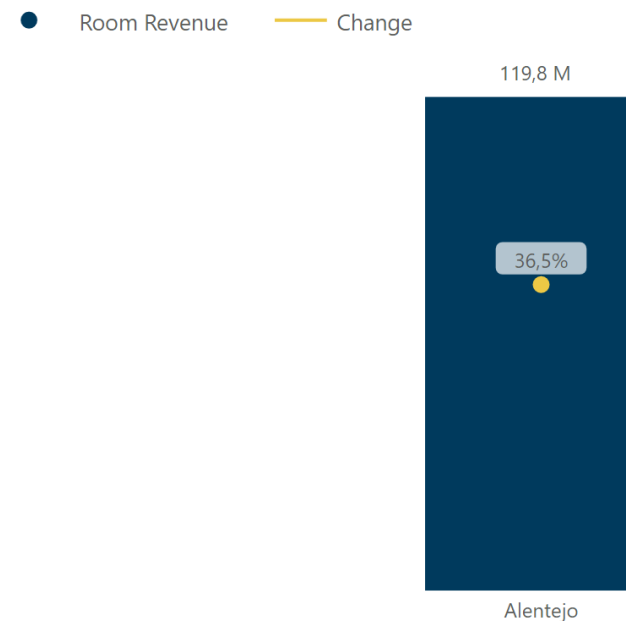
In overall revenue, the Alentejo region maintained the 6th position in relation to the other regions of the country, whether the reference is the year 2019 or 2021.

Alentejo | Room Revenue

Room Revenue [millions €]



Room Revenue [millions €] por NUTS II



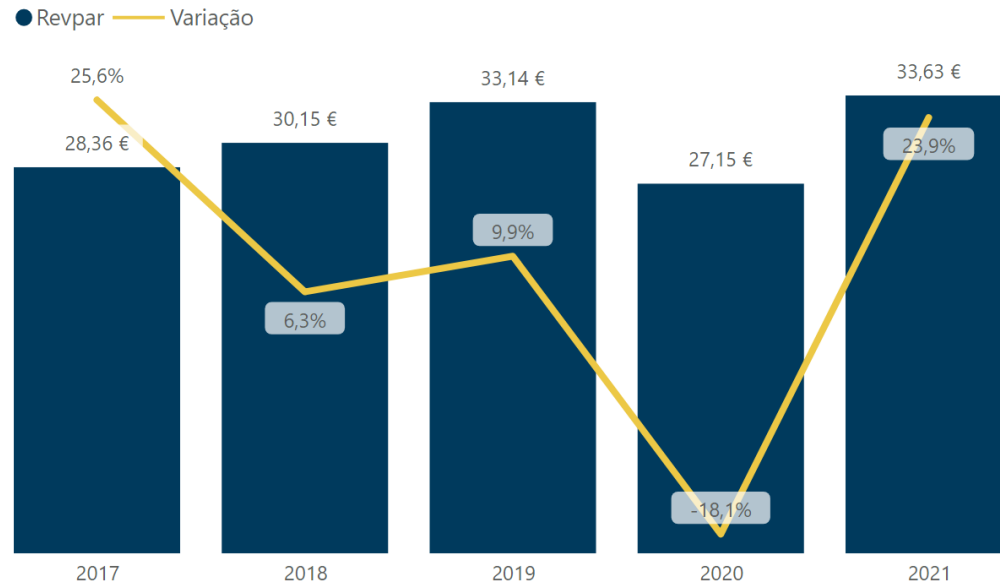
Room Revenue, from accommodation units in the Alentejo region, decreased by 32% in 2020, due to the Covid-19 pandemic, but showed a good recovery in 2021, with the amount rising to €119.8 million, which resulted in an increase of 37% (plus €32.1 million).

If we evaluate the drop seen compared to 2019 (pre-pandemic year), accommodation units earned €10.1 million less in room revenue (-8%).

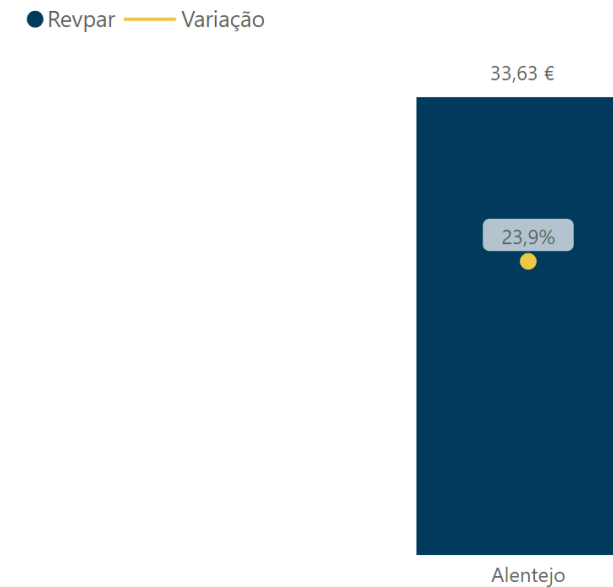
Also, in revenue from rooms, the Alentejo region maintained the 6th position compared to the country, both in 2019 and in 2021.

Alentejo | RevPar

Average revenue per available room (RevPAR) [€]



Average revenue per available room (RevPAR) [€]



The average revenue per available room (RevPar) followed the evolution of the other indicators and reached €27.15 in 2020, the lowest value of the last five years represented here.

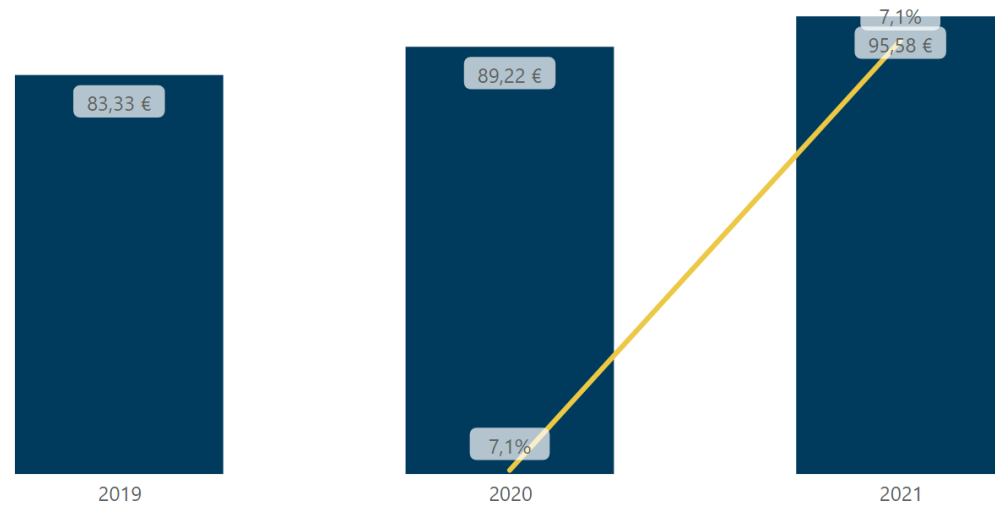
A 24% growth from 2020 to 2021 has placed RevPar at €33.63, the highest value ever. €0.49 more than in 2019, which in relative terms represented a growth of 1.5%.

In this indicator, Alentejo rose 3 positions, between 2019 and 2021. In 2019 it occupied 6th place in the country and in 2021 it rose to 3rd position.

Alentejo | ADR

Average revenue per occupied room (ADR) [€]

● ADR — Variação

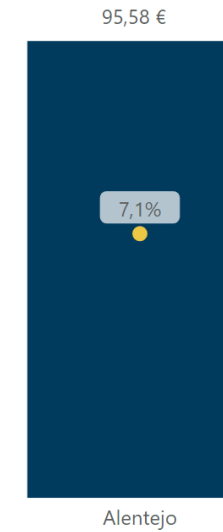


The ADR indicator, for Alentejo, shows progressive growth between 2019 and 2021.

Growth of 7% from 2019 to 2020 (from €83.33 to €89.22) and a further 7% for 2021, where it reached €95.58, the highest value ever.

Average revenue per occupied room (ADR) [€]

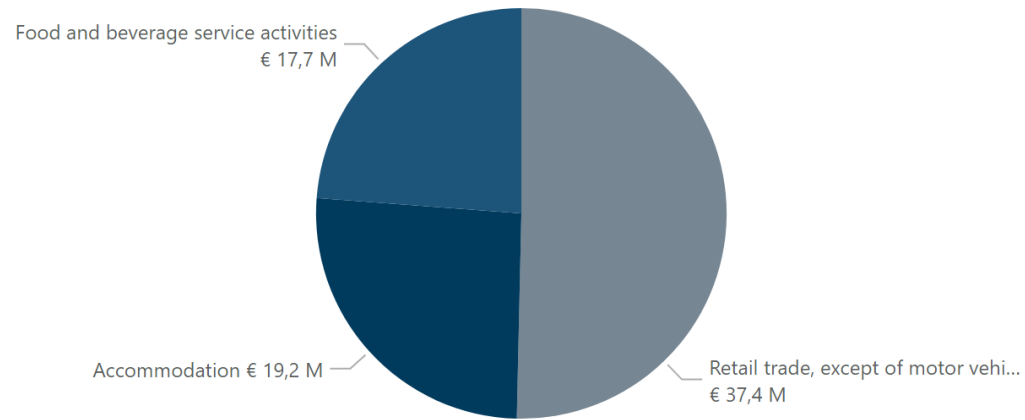
● ADR — Variação



Also in this indicator, Alentejo rose 1 position, between 2019 and 2021. In 2019 it occupied 3rd place in the country and in 2021 it rose to 2nd position.

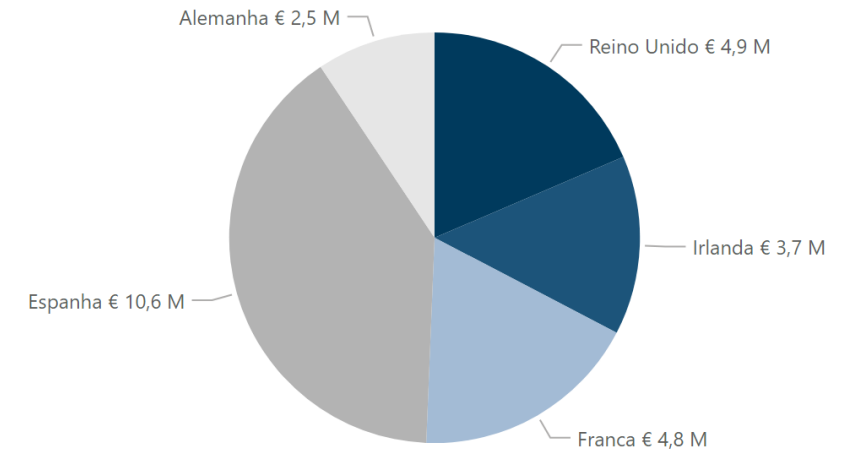
Alentejo | Consumption Profile - 2021

TOP 3 Purchasing Value by ISIC [millions €]



In 2021, the 3 main sectors of activity concentrated 98.7% of total purchases made in the national territory (98.5% in 2019).

Tourism ISIC Purchasing Value by market (TOP 5) [millions €]



The set of markets that made up the TOP 5 in 2021, shown in the graph above, represented 71.8% of total purchases made in activities directly linked to Tourism.

In 2019, immediately before the start of the pandemic, the same markets accounted for 70.3%.

Technical Datasheet

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Author: Direção de Gestão de Conhecimento
Departamento de Business Intelligence

Sources: ANA – Aeroportos de Portugal; BP – Banco de Portugal; INE – Instituto Nacional de Estatística; SIBS Analytics; TdP– Turismo de Portugal, I.P.

Information Classification: External Use

Report Date: 02/12/2022