



# Tourism in Portugal 2021

# Portugal | Supply Indicators - 2021



## Establishments

6.271

21,0%

Change 21/20

6,1%

CAGR 21/17



## Rooms

179,5 K

18,3%

Change 21/20

0,9%

CAGR 21/17



## Beds

404,9 K

17,4%

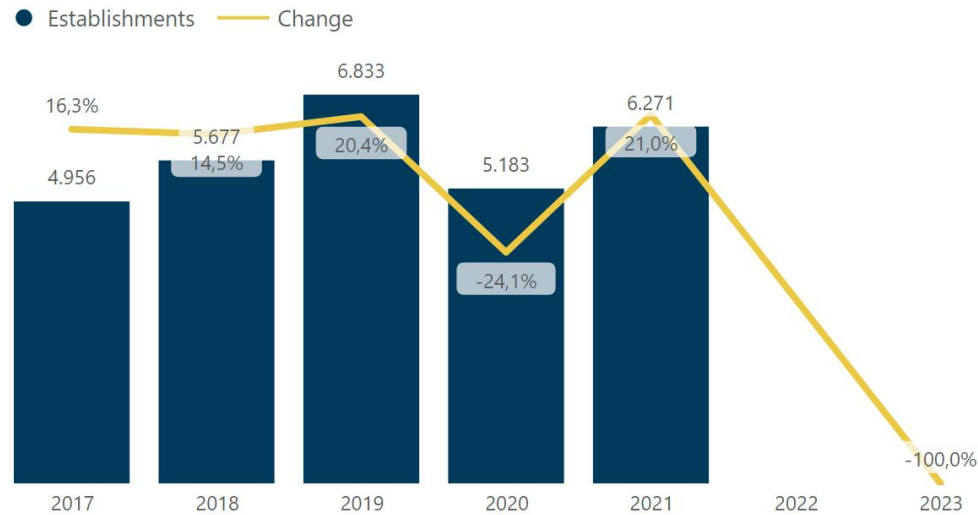
Change 21/20

0,4%

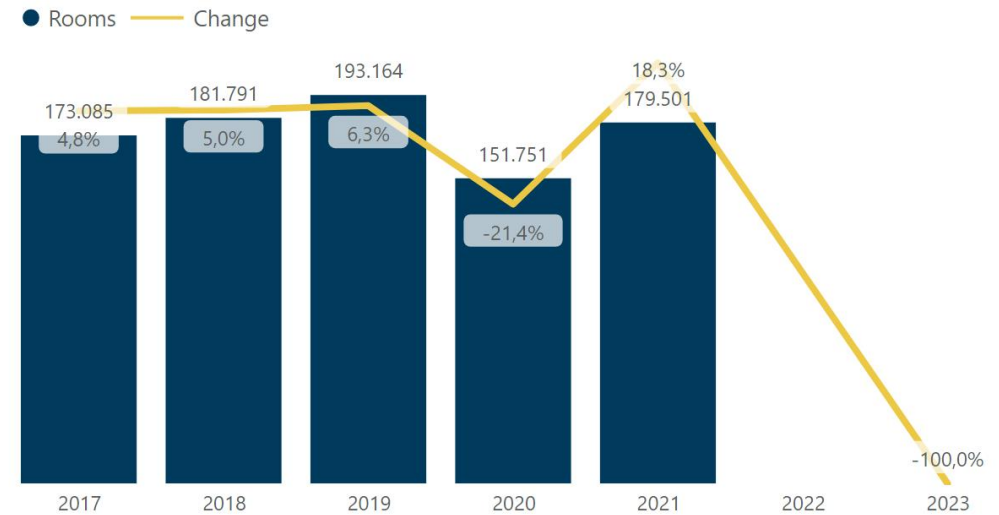
CAGR 21/17

# Portugal | Supply

## Establishments (unit - July)



## Rooms (unit - July)



## Beds (unit - July)









2021 marked the beginning of the recovery from the serious economic crisis generated by Covid-19, which had a strong impact on all activities linked to Tourism. In Portugal, in May 2020, after strict confinements decreed by the government, 70% of establishments were closed, or didn't register any guest movement.

In 2021 there were increases compared to 2020, but which still did not equal 2019, the pre-pandemic year, with regards to the hotel offer:

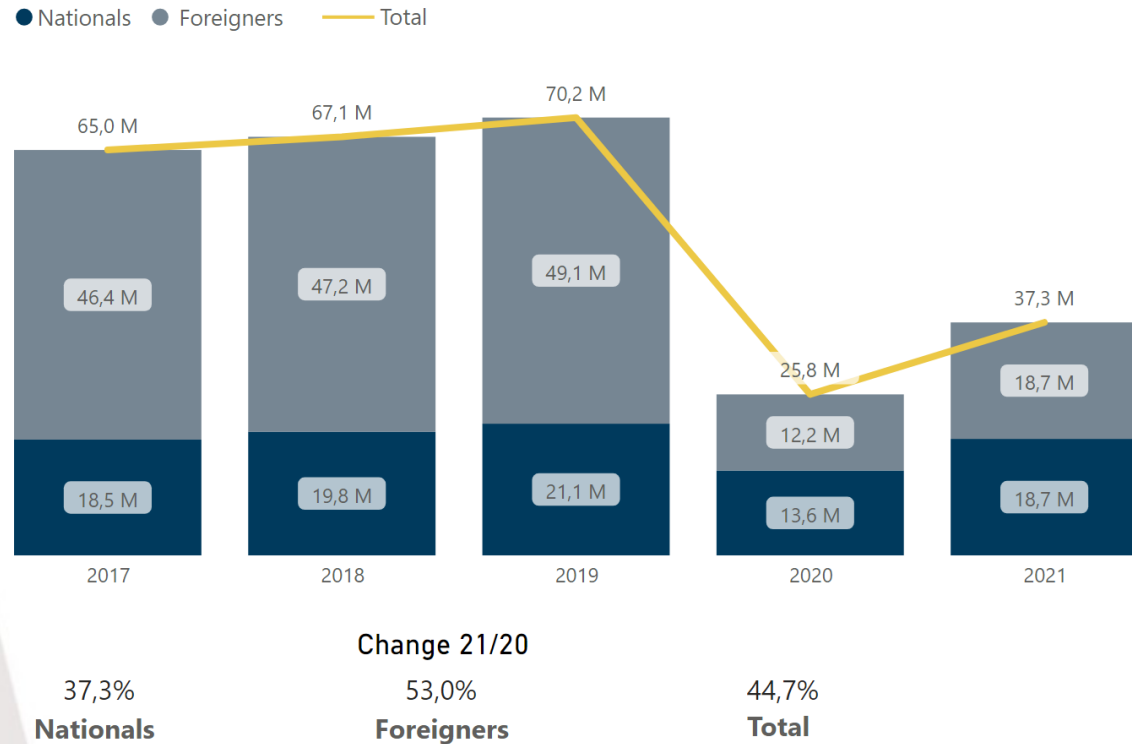
- 6.271 establishments (+21% when compared with 2020, but -8% when compared with 2019);
- 179.501 rooms (+18% when compared with 2020, but -7%, when compared with 2019);
- 404.857 beds (+17% when compared with 2020, but -9% when compared with 2019).

# Portugal | Demand Indicators - 2021

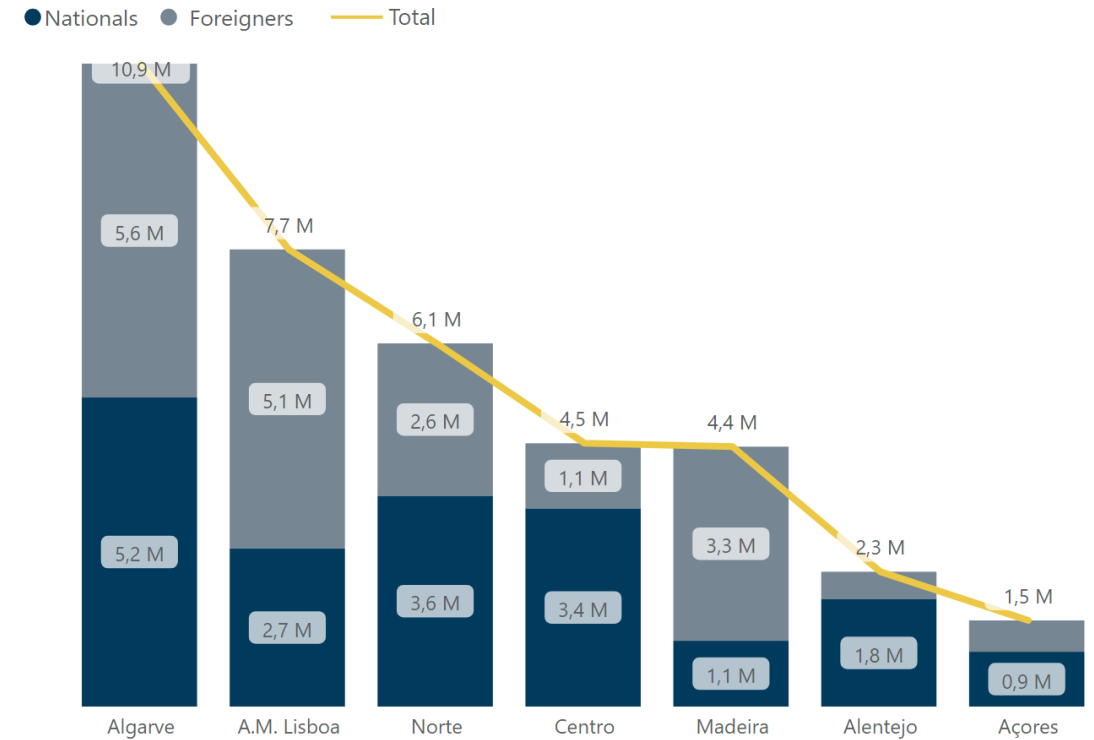
 Overnight Stays	 Guest	 Seasonality	 Bed Occupancy Rate	 Room Occupancy Rate	 Average Stay
<b>37,3 M</b>	<b>14,5 M</b>	<b>47,2%</b>	<b>28,6%</b>	<b>35,1%</b>	<b>2,6 noites</b>
<b>44,7%</b> Change 21/20	<b>38,6%</b> Change 21/20	<b>3.6 p.p.</b> Change 21/20	<b>7.8 p.p.</b> Change 21/20	<b>9.6 p.p.</b> Change 21/20	<b>0,1 noites</b> Change 21/20
<b>-12,9%</b> CAGR 21/17	<b>-11,8%</b> CAGR 21/17	<b>10.2 p.p.</b> Change 21/17	<b>-24.3 p.p.</b> Change 21/17	<b>-31.3 p.p.</b> Change 21/17	<b>-0,1 noites</b> Change 21/17

# Portugal | Overnight Stays

Overnights Stays [million]



Overnight stays 2021 by NUTS II [millions]



The trend seen in terms of supply followed that of demand. It was recorded:

- 37,3 million overnight stays, equally shared between residents and non-residents (18.7 million). In global terms, 11.5 million more overnight stays were accounted for, compared to 2020 (+45%), but 32.8 million less than in 2019 (-47%);
- Resident numbers increased by 37% compared to 2020 (-12% compared to 2019) and non-residents by 53% (-62% compared to 2019).

The Algarve and Lisbon Metropolitan Area concentrated 50% of the total overnight stays registered in the country (51% in 2020 and 56% in 2019). It was in these regions that the impact of Covid-19 was most felt. The Algarve still attracted resident guests, who did not travel abroad, and which generated an increase of 241.8 thousand overnight stays in 2021, compared to 2019, but Lisbon lost 1.2 million overnight stays for residents between these two years.

It was also these two regions that recorded the highest number of overnight stays from non-residents in the country (10.7 million, representing 57% of overnight stays from non-residents in Portugal). Compared to 2020, there was an increase of 3.3 million overnight stays from abroad but, compared to 2019, when that share was 62%, there was still a drop of 19.9 million overnight stays.

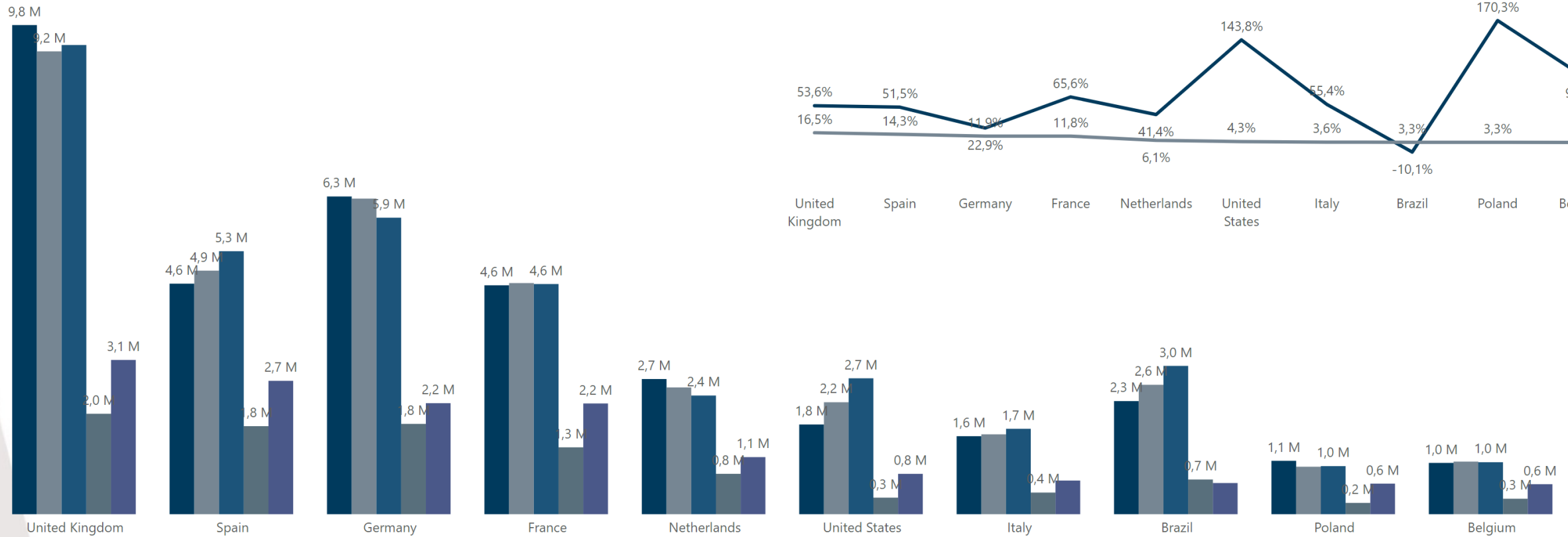
# Portugal | Overnight Stays - 2021



# Portugal | Overnight Stays

Top 10 Overnight Stays – Source Markets [million]

● 2017 ● 2018 ● 2019 ● 2020 ● 2021



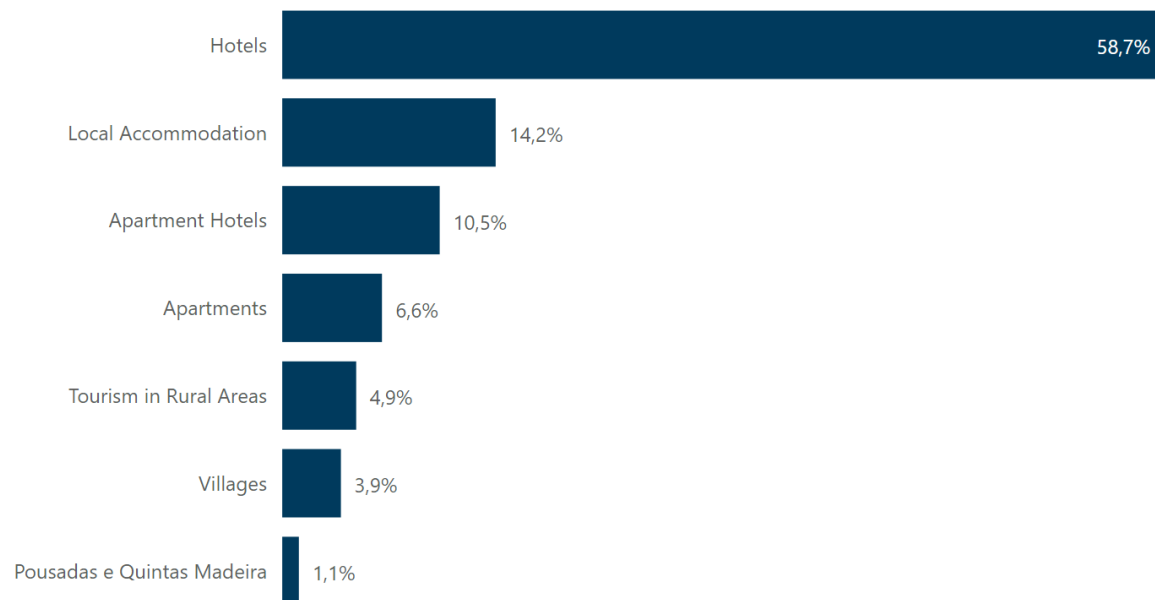
The group of foreign markets that made up the TOP 10, in 2021, represented 78% of total external demand (80% in 2020 and 77% in 2019).

There were changes in the positions of some markets: exchange between Spain and Germany, with Spain now in 2nd position. Brazil drops from 6th to 8th place and Ireland leaves the TOP 10 to enter Poland in 9th position.

All these markets registered increases compared to 2020, apart from Brazil (-10%) and, in relation to 2019 (pre-pandemic year), all of them still presented decreases of more than 60%.

# Portugal | Overnight Stays

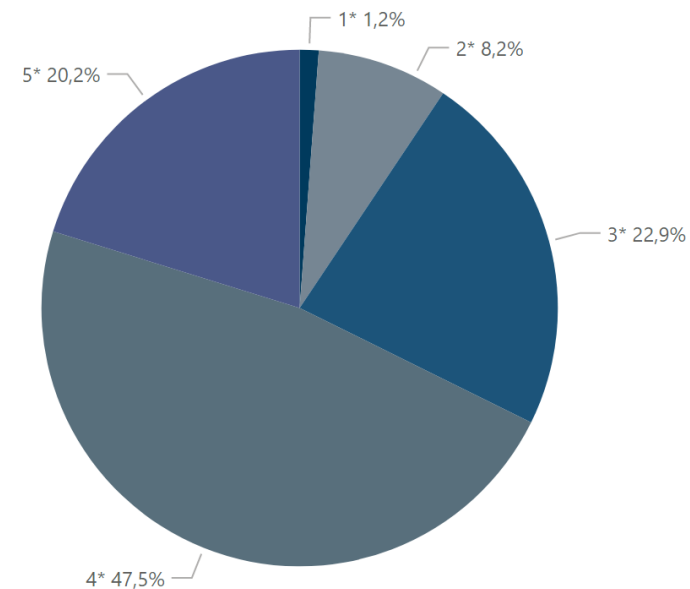
Share of overnight stays in 2021 by type



Hotels were the preferred typology for tourists who stayed in accommodation units in 2021.

59% of overnight stays were in hotels; local accommodation and aparthotels came in 2nd and 3rd, but with much lower shares (14% and 11%, respectively).

Share of hotel categories in 2021



In the "hotel" category, 4\* hotels recorded the highest number of overnight stays (48%), followed by 3\* hotels with 23% and 5\* hotels with 20% of demand.

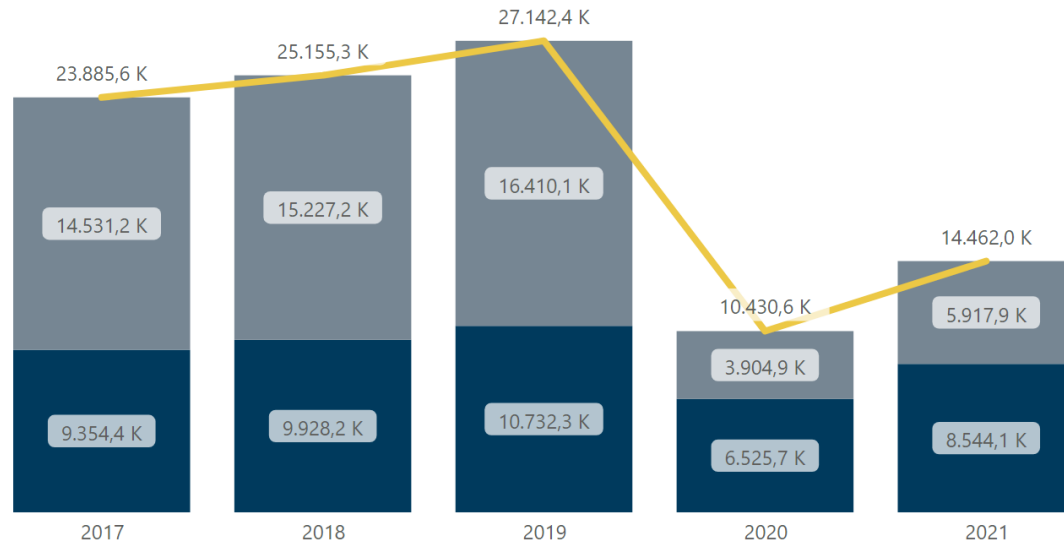
This distribution has shown homogeneity over the last few years. In 2019, the pre-pandemic year, 4\* hotels recorded a 49% share of overnight stays, 3\* hotels 22% and 5\* hotels 19%.



# Portugal | Guests

Guests [thousands]

● Nationals ● Foreigners — Total



Change 21/20

30,9%  
Nationals

51,5%  
Foreigners

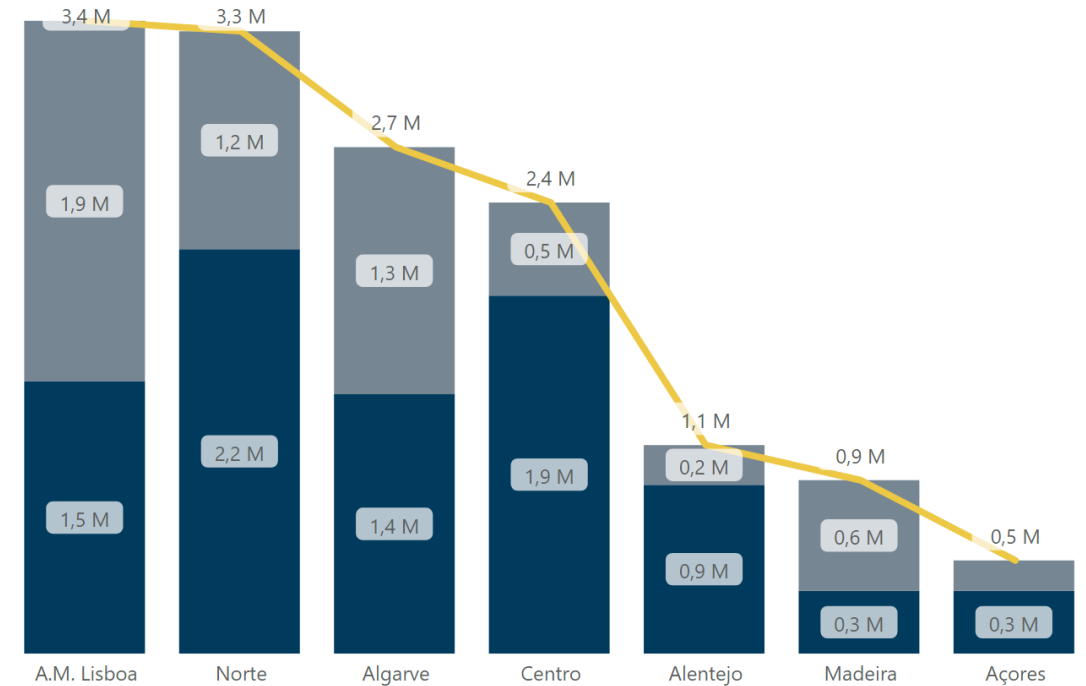
38,6%  
Total

Regarding guests, and 2021 being a year of recovery, there was a predominance of the internal market (59% share).

- 14,5 million guests, of which 8.5 million were residents and 5.9 million were non-residents. In global terms, there were 4.0 million more guests, compared to 2020 (+39%), but 12.7 million less than in 2019 (-47%);
- Residents increased by 31% compared to 2020 (-20% compared to 2019) and non-residents by 52% (-64% compared to 2019).

Guests 2021 by NUTS II [millions]

● Nationals ● Foreigners — Total



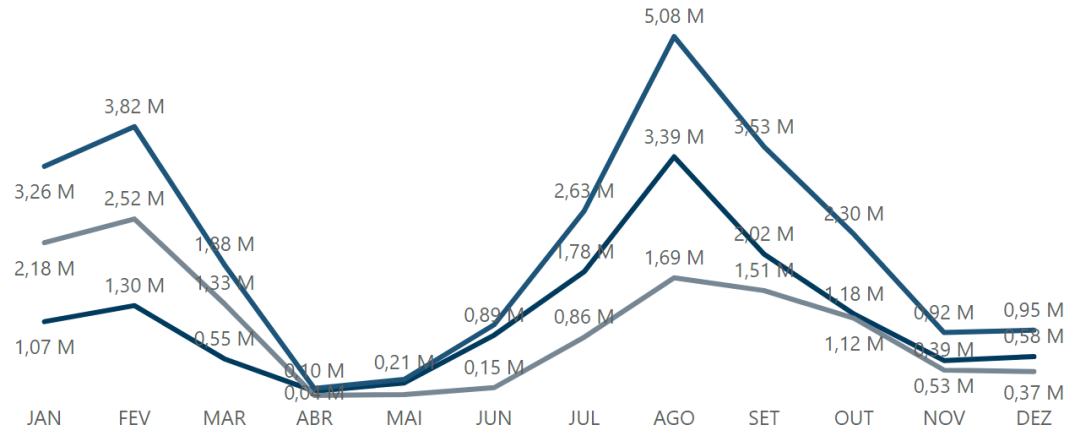
The Lisbon Metropolitan Area, the Norte and Algarve regions concentrated 66% of the total guests registered in the country (66% also in 2020 and 71% in 2019).

It was also these regions that hosted the highest number of non-resident guests in the country (4.4 million, representing 75% of the total number of guests from abroad who chose to stay overnight in hotels in Portugal). Compared to 2020, there was an increase of 1.4 million guests, but compared to 2019, when this share was 77%, these regions received 6.8 million fewer guests.

# Portugal | Seasonality

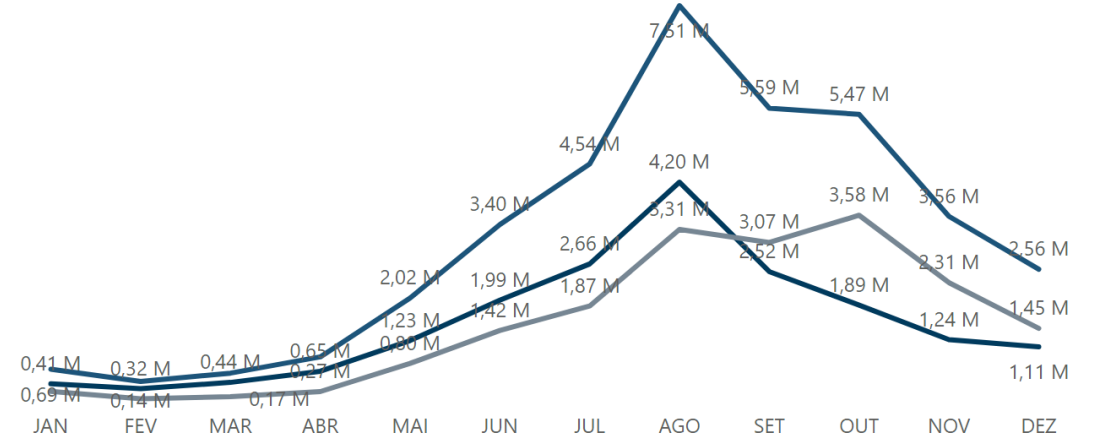
Overnight stays 2020 [millions]

● Nationals ● Foreigners ● Total



Overnight stays 2021 [millions]

● Nationals ● Foreigners ● Total



One of the concerns taken into account in the 2020-2027 Tourism Strategy was to promote policies that promote the sustainability of tourism activity throughout the year, combating the seasonality that exists in the country.

With the pandemic, with greater focus in 2020, tourist activity developed wherever and whenever possible, in view of the restrictions imposed around the world.

As of March 2020, the confinements decreed by the various governments and the ban on leaving the area of residence, led to the greatest economic and social crisis experienced in recent years.

Thus, out of the 36.3% seasonality rate recorded in 2019, the pre-pandemic year, 2020 ended with a worsening of 7.3 p.p., reaching 43.6%.

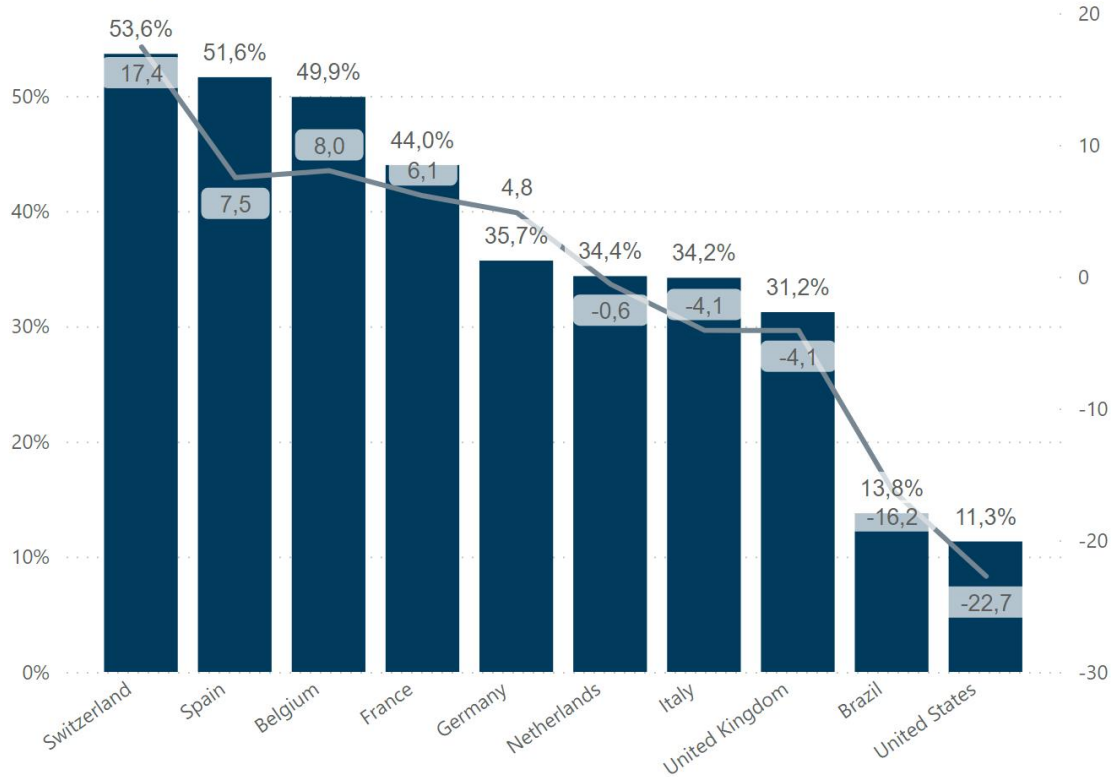
As a result of new variants of the Covid-19 virus, which emerged at the end of 2020 and beginning of 2021, which led to new confinements, the seasonality rate rose again, now to 47.2%, i.e. 10 more .9 p.p. compared to 2019.

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

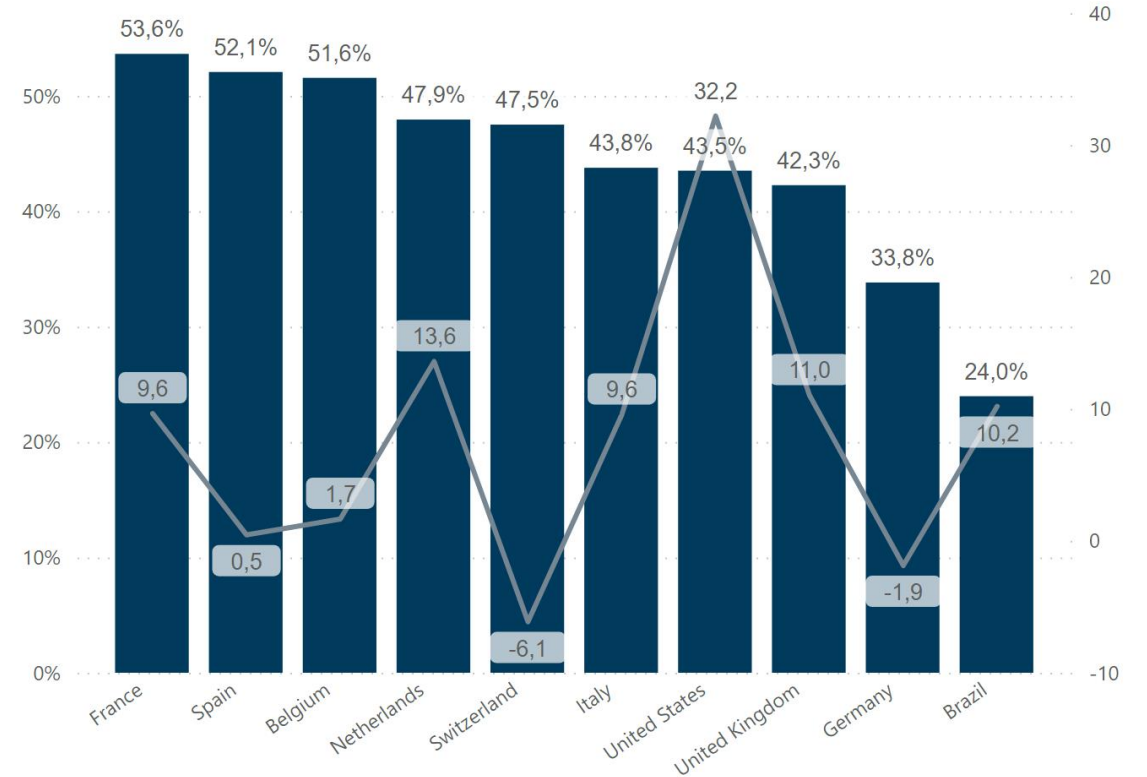
Source: INE - Instituto Nacional de Estatística (definitive data)

# Portugal | Seasonality

Seasonality Rate by market in the year 2020



Seasonality Rate by market in the year 2021



As already mentioned, the seasonality rates recorded in 2020 and also in 2021, relate to two years in which tourist activity had periods in which it really stopped, or was strongly conditioned by the confinements to which the world was subject, to combat the uncontrolled evolution of Covid-19.

Taking 2019 as a reference, an excellent year for Tourism and pre-pandemic, it was found that Spain, with the highest seasonality rate of these 10 markets considered here with 44%, reached 53.6% in 2020 (+9.5 p.p. compared to 2019) and, in 2021, 52.1% (+8.0 p.p.).

Considering some of the main markets, in terms of demand, the situation is still far from the levels from 2019:

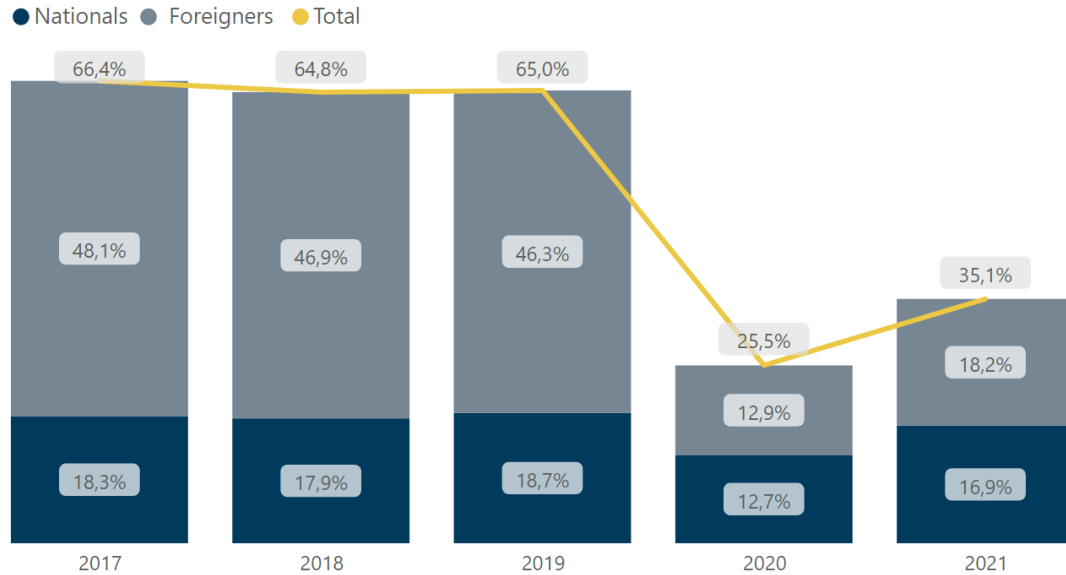
- France, the seasonality rate was still high (37.9% in 2019 and 53.6% in 2021);
- United Kingdom, 35,3% em 2019 e 42,3% em 2021;
- Netherlands, 34.9% in 2019 and 47.9% in 2021;
- USA 34,1% vs 43,5%;
- Germany, 30,9% vs 33,8%.

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

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

# Portugal | Occupancy Rates

Room Occupancy Rate (ROR) [%]

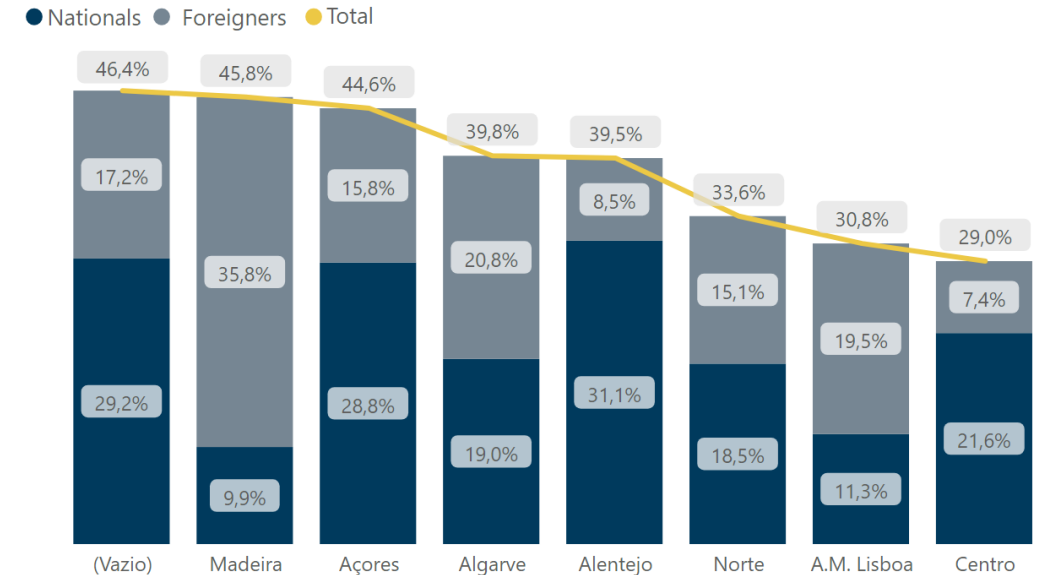


The Room Occupancy Rates indicator is the portrait of what has been the impact of the Covid-19 pandemic on the tourist activity in Portugal.

The years 2020 and 2021 showed sharp declines in occupancy, with greater incidence in foreign guests (from 46.3% of room occupancy in 2019, it dropped to 18.2% in 2021, that is, a decrease of 28.1 p.p.).

With regards to the residents, many of whom chose to remain in Portugal, the declines were less pronounced (from 18.7% room occupancy in 2019 to 16.9% in 2021, a decrease of just 1.8 p.p.).

Room Occupancy Rate (ROR) [%]



The A.M. Lisboa, which, in 2019, was the region with the fourth highest occupancy rate, with 75.8% (59.6% foreigners and 16.3% nationals), occupied, in 2021, the 6th position, with 30.8% (19.5% foreigners and 11.3% nationals).

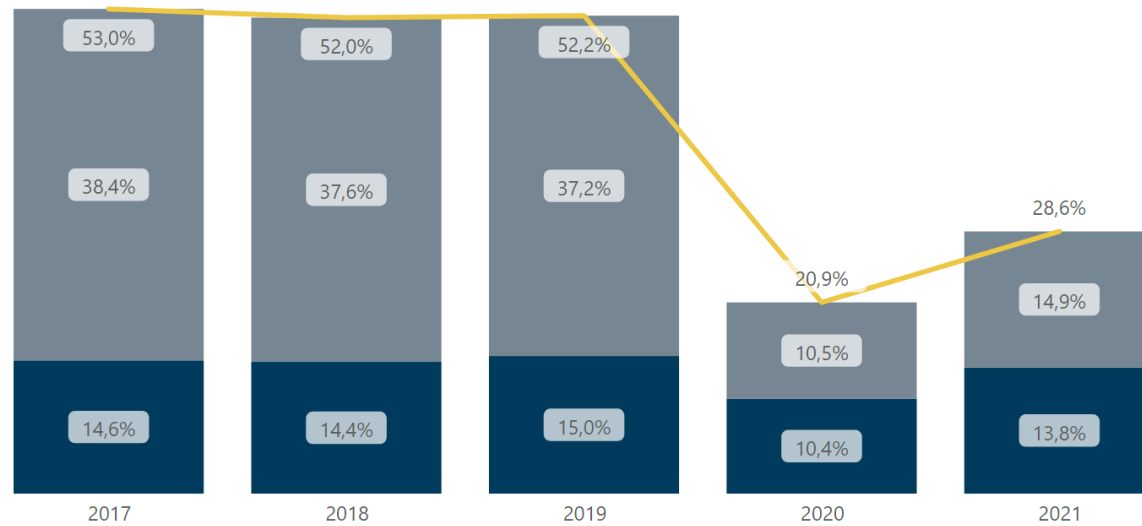
Madeira, which ranked 2nd in 2019, with 69.4% of room occupancy (61.3% foreigners and 8.1% nationals), moved to 1st place in 2021, with 45.8% (35.8% foreigners and 9.9% nationals).

The Centro region continued, in 2021, to record the fourth lowest occupancy rate. 46.2% in 2019 and 28.9% in 2021, with less 13.1 p.p. in the occupancy of four foreigners and less 4.3 p.p. in nationals.

# Portugal | Occupancy Rates

Bed Occupancy Rate (BOR) [%]

● Nationals ● Foreigners ● Total

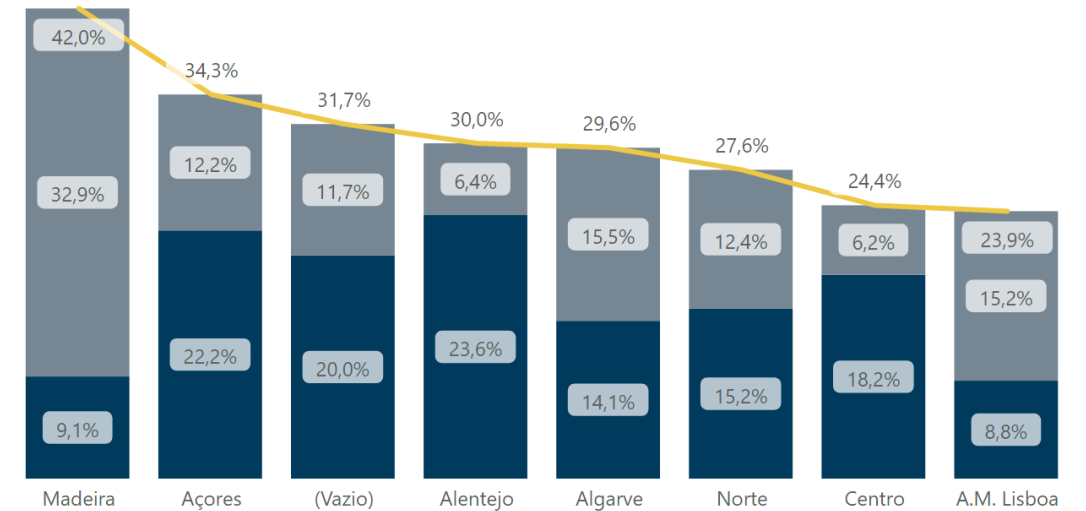


As on the previous slide, regarding the room occupancy rate, the years 2020 and 2021 also showed sharp drops in bed occupancy, with greater incidence in guests from abroad (from 37.2% of bed occupancy in 2019, there was a decrease to 14.9% in 2021, i.e. a decrease of 22.3 p.p.).

With regard to Portuguese guests, the declines were less pronounced (from 15.0% bed occupancy in 2019 to 13.8% in 2021, a decrease of just 1.2 p.p.).

Bed Occupancy Rate (BOR) [%]

● Nationals ● Foreigners ● Total



Madeira continues to be the region with the highest bed occupancy rate, whether considering 2019 (63.2% bed occupancy, with 55.8% foreigners and 7.4% nationals), or 2021, with 42, 0% (32.9% foreigners and 9.1% nationals).

Lisbon, which in 2019 was the region with the 2nd highest bed occupancy rate, with 60.4% (47.4% foreigners and 13.0% nationals), dropped, in 2021, to the lowest value of the country, with 23.9% (15.1% of foreigners and 8.7% of nationals).

# Portugal | Profitability Indicators - 2021



**Total Revenue**

**2,3 bn**

**61,2%**

Change 21/20

**-10,0%**

CAGR 21/17



**Room Revenue**

**1,8 bn**

**62,8%**

Change 21/20

**-9,7%**

CAGR 21/17



**RevPar**

**32,55 €**

**43,9%**

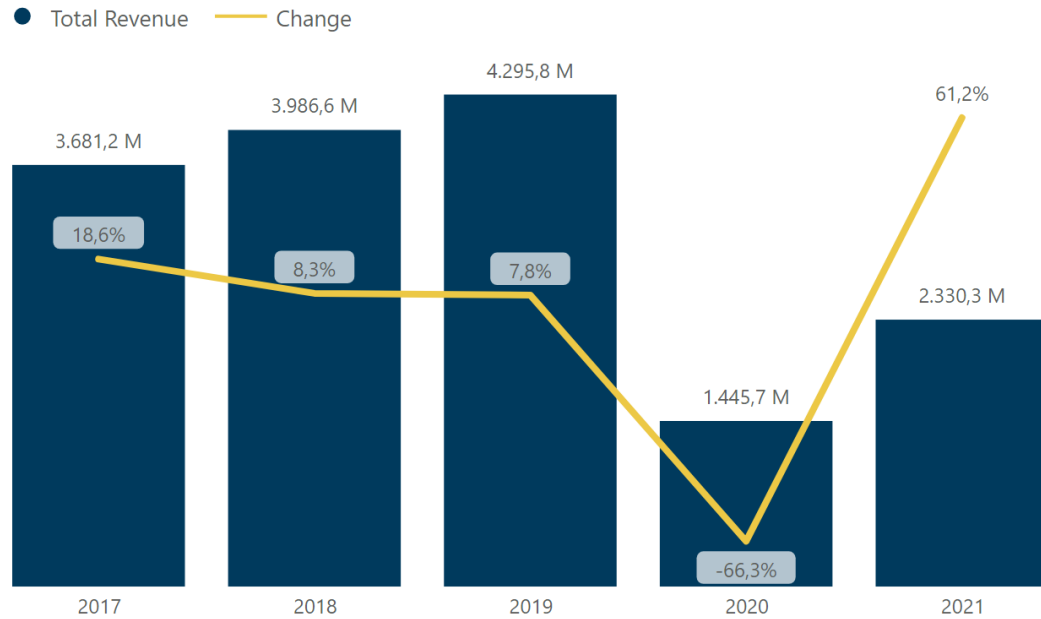
Change 21/20

**-8,6%**

CAGR 21/17

# Portugal | Total Revenue

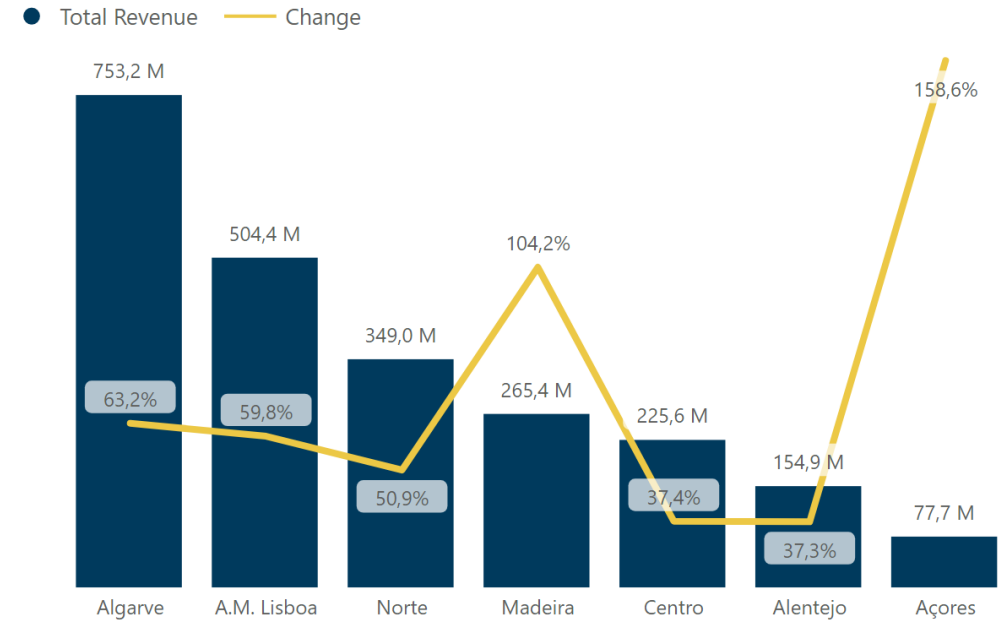
Total Revenue [million €]



Total revenue from accommodation units in Portugal decreased by 66.% in 2020, as a result of the Covid-19 pandemic, but already showed a recovery in 2021, reaching €2.3 billion, which translated into an increase of 61% ( plus €884.6 million).

If we assess the drop seen in 2021 compared to 2019 (pre-pandemic year), accommodation units earned €2 billion less in global revenue (-46%).

Total Revenue [million €] by NUTS II



All regions recorded increases in global revenue from 2020 to 2021.

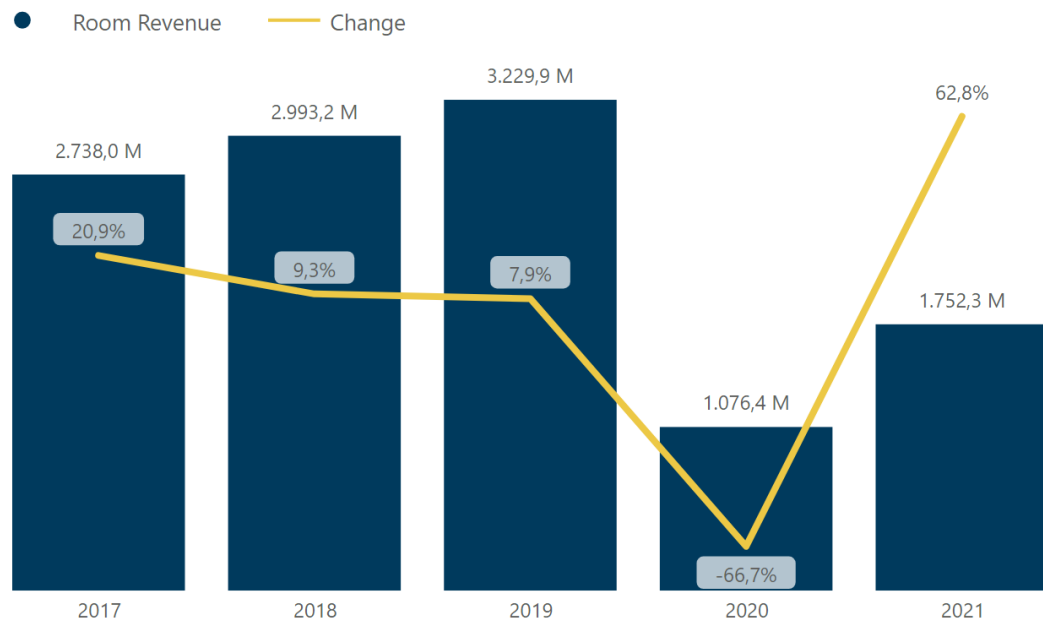
The Alentejo region was the one with the least pronounced decrease between 2019 and 2021 (-12%, equivalent to - 20.0 million €).

Lisbon, which in 2019 was the region that registered the highest value in the country with €1.4 billion, in 2021 dropped one place with a drop of 63%. In 2021 this region accounted for €504.4 million (-€867.8 million than in 2019).

The Algarve rose to the highest amount of global revenue in the country, in the years 2020 and 2021 but, with 2021, still 39% below the value reached in 2019, which was € 1.2 billion (-472, €5 million).

# Portugal | Room Revenue

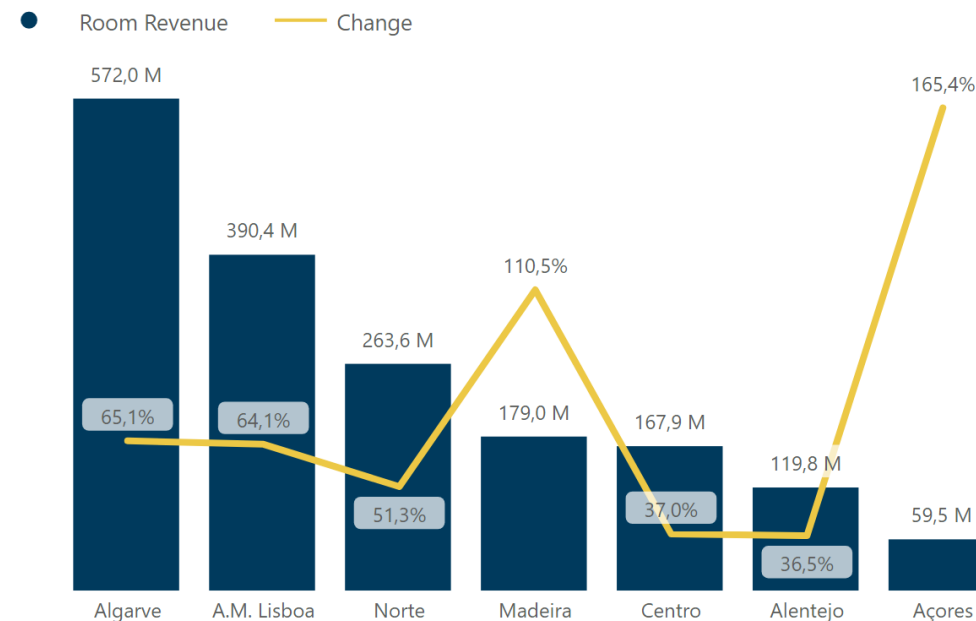
Room Revenue [millions €]



Revenue from rooms, in Portugal, decreased by 67% in 2020, due to the Covid-19 pandemic, but recovered in 2021 with the amount rising to €1.8 billion, which translated into an increase of 63% (plus €675.8 million).

If we assess the drop compared to 2019 (pre-pandemic year), accommodation units earned €1.5 billion less in room revenue (-46%).

Room Revenue [millions €] por NUTS II



All regions noted positive developments in room revenue from 2020 to 2021.

The Alentejo region was the one with the least noticeable decrease between 2019 and 2021 (-8%, equivalent to -10.1 million €).

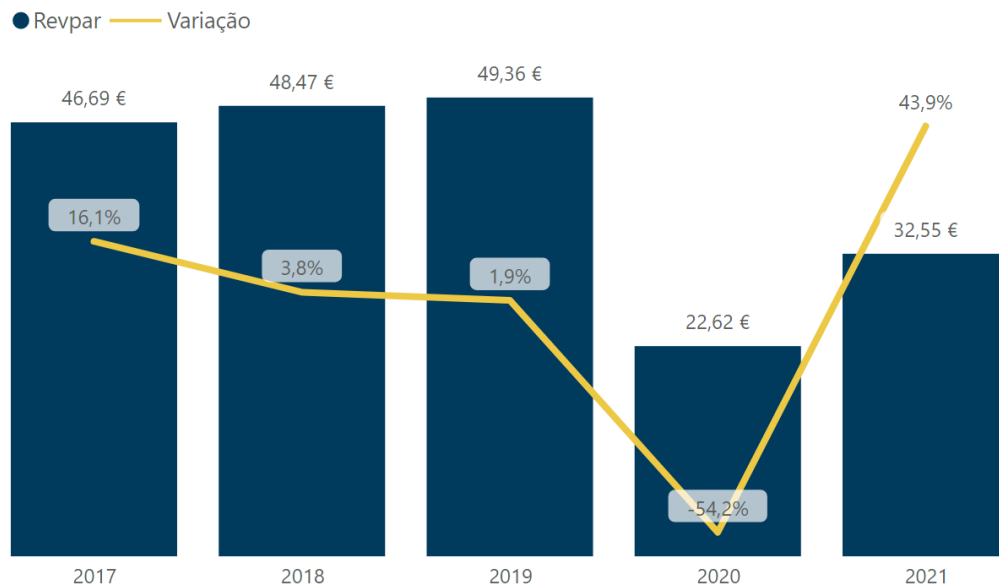
Also in room revenue, Lisbon was the region that, in 2019, recorded the highest amount in the country, with €1.1 billion. In 2020 and 2021 it moved to 2nd place, with this last year showing a decrease of 64%, compared to 2019.

The Algarve occupied 1st place in 2020 and 2021, but still 37% below the value recorded in 2019, which was €909.6 million (-€337.6 million).



# Portugal | RevPar

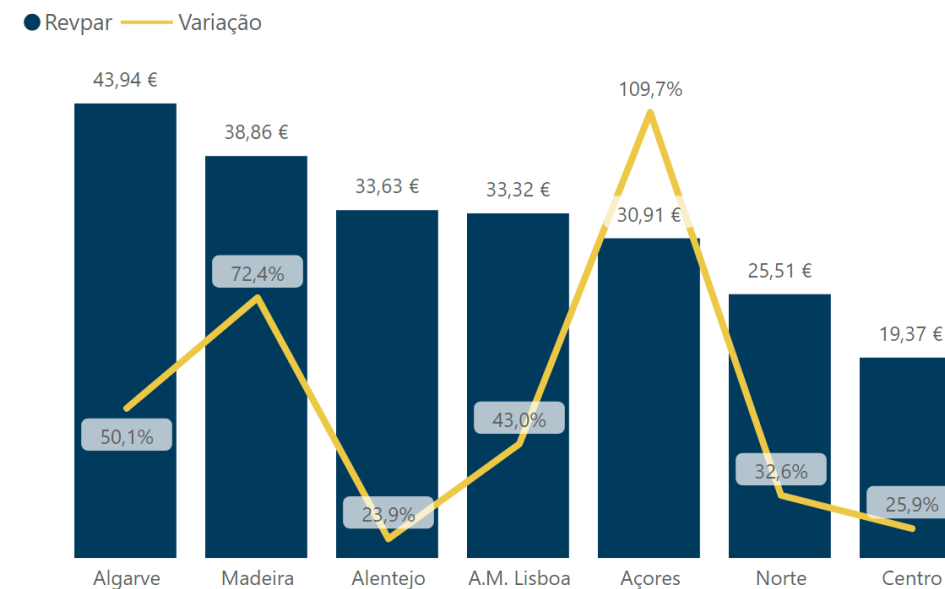
Average revenue per available room (RevPAR) [€]



The average revenue per available room (RevPar) followed the evolution of the other indicators during the pandemic and stood at €22.62 in 2020, the lowest value in the last five years represented here (-€26.74 compared to 2019, i.e. -54%).

A growth of 44% from 2020 to 2021 placed RevPar at €32.55, but still 34% less compared to 2019 (-€16.81).

Average revenue per available room (RevPAR) [€]



All regions had higher RevPar ratios in 2021 compared to 2020.

The Alentejo region was the only one that registered an increase between 2019 and 2021 (+1%, equivalent to +0.49€).

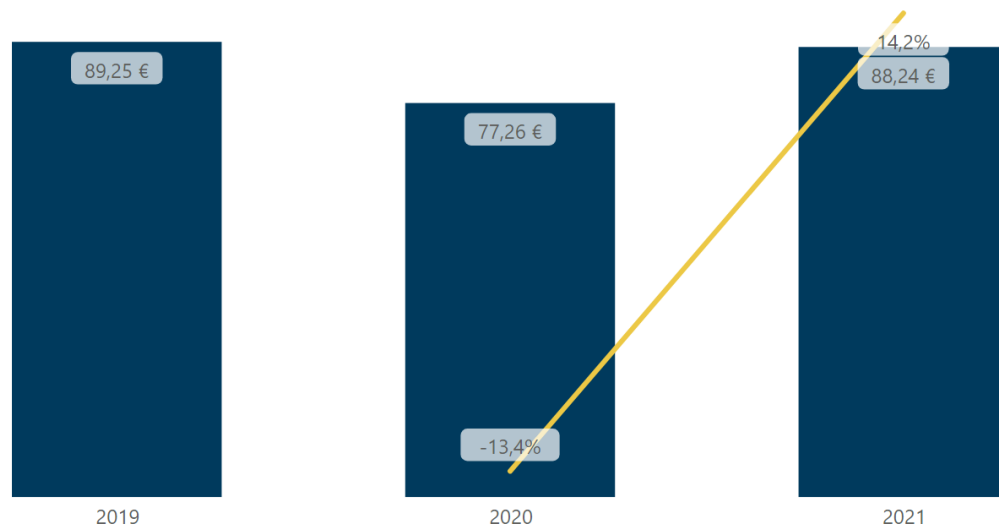
As well as in room revenue, also in RevPar, Lisbon was the region that, in 2019, registered the highest amount in the country, with €73.71. In 2021 with €33.32, it moved to 4th place (-55% compared to 2019).

The Algarve occupied 1st place in 2020 and 2021, but still 19% below the value recorded in 2019, which was €54.55 (-€10.61).

# Portugal | ADR

Average revenue per occupied room (ADR) [€]

● ADR — Variação

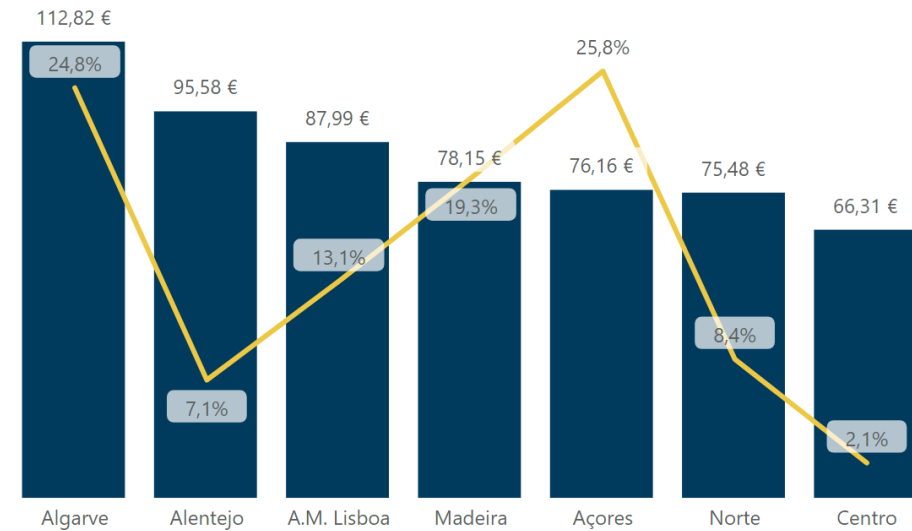


The average revenue per occupied room (ADR) accompanied the evolution of the other indicators during the pandemic and stood at €77.26 in 2020.

A growth of 14% from 2020 to 2021 placed the ADR at €88.24, just 1% less compared to 2019 (-€1.01).

Average revenue per occupied room (ADR) [€]

● ADR — Variação



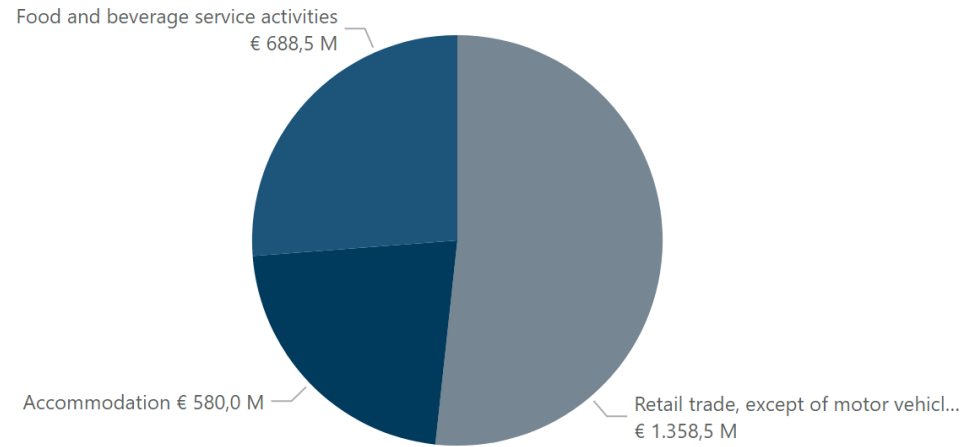
All regions had higher ADR ratios in 2021 compared to 2020.

Comparing with 2019, the pre-pandemic year, the Algarve, the Alentejo, Madeira and Centro have already achieved higher ADR ratios in 2021, distributed as follows:

- Algarve, more 18% when compared with 2019 (+17,45€);
- Alentejo, more 15% when compared with 2019 (+12,25€);
- Madeira, more 14% when compared with 2019 (9,32€);
- Centro, more 3% when compared with 2019 (+1,94€).

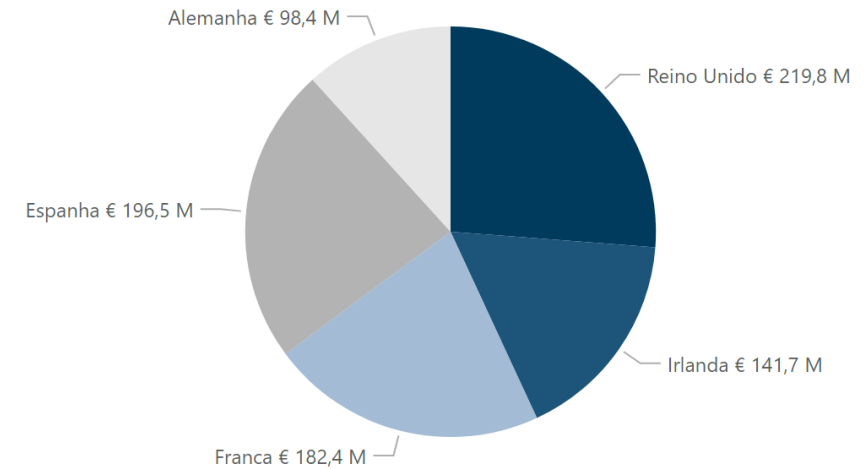
# Portugal | Consumption Profile - 2021

TOP 3 Purchasing Value by ISIC [millions €]



In 2021, the 3 main sectors of activity concentrated 90.5% of total purchases made in the national territory (85.1% in 2020 and 90.9% 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 66% of total purchases made in activities directly linked to Tourism.

In 2020, the same markets represented 71% and, in 2019, immediately before the start of the pandemic, their share was 62%.

It should be noted that the TOP 5 of 2019 was not, in its entirety, made up of the same markets.

# Portugal | Airport Flows Indicators - 2021



## Passengers Landed

12,5 M

42,0%

Change 21/20

-16,5%

CAGR 21/17



## Seats

37,3 M

35,5%

Change 21/20

-11,6%

CAGR 21/17



## Load Factor

67,0%

2.3 p.p.

Change 21/20

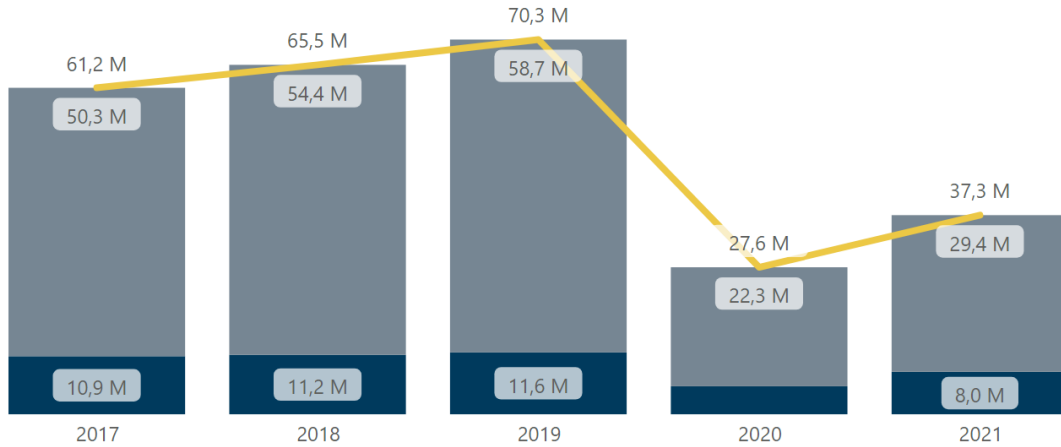
-17.3 ...

CAGR 21/17

# Portugal | Airport Flows

## Supply of Seats [million]

● Domestic ● Internacional — Total



### Change 21/20

51,4%  
**Domestic**

31,7%  
**Internacional**

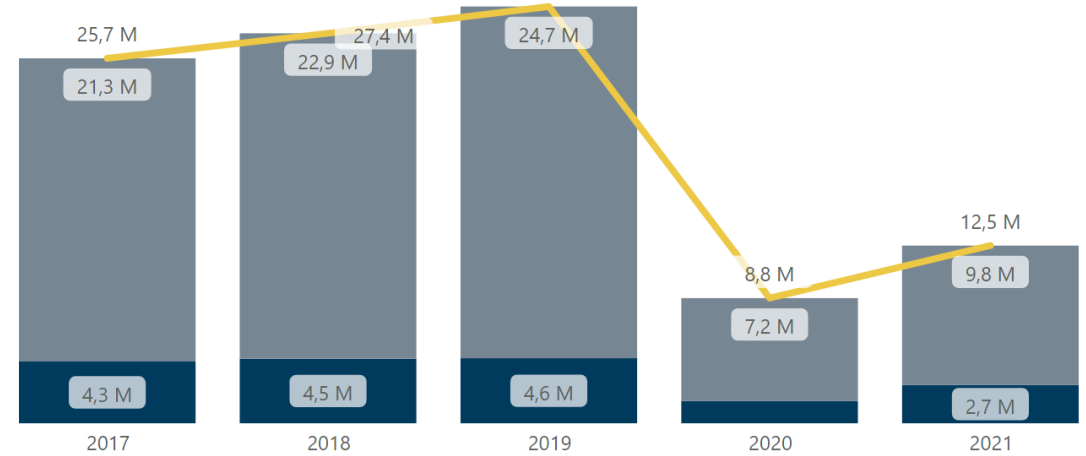
35,5%  
**Total**

The number of seats available in 2021 surpassed the value for 2020 by 36%, which, in absolute numbers, translated into an increase of 9.8 million seats (2.7 million for domestic flights and 7.1 million for international flights).

If we compare with 2019, we still see drops of 47% for the total (-32.9 million seats), minus 31% for domestic flights (-3.6 million seats) and minus 50% for international flights (-29.3 million seats).

## Passengers Landed [million]

● Domestic ● Internacional — Total



### Change 21/20

71,7%  
**Domestic**

35,5%  
**Internacional**

42,0%  
**Total**

Passengers disembarking at national airports grew by 42%, from 8.8 million in 2020 to 12.5 million in 2021 (+3.7 million, of which +1.1 million were domestic flights and +2.6 million international flights).

In comparison with the situation experienced in 2019, it appears that, compared to the 29.3 million passengers disembarked that year, 2021 is still short by 57% (-16.8 million passengers, of which -1.9 million domestic flights and -14.9 million international flights).

# Portugal | Tourism Balance - 2021



## Tourism Balance

6.489 M

30,5%

Change 21/20

-13,3%

CAGR 21/17



## Tourism Receipts

10.063 M

30,4%

Change 21/20

-10,3%

CAGR 21/17



## Tourism Expenditure

3.574 M

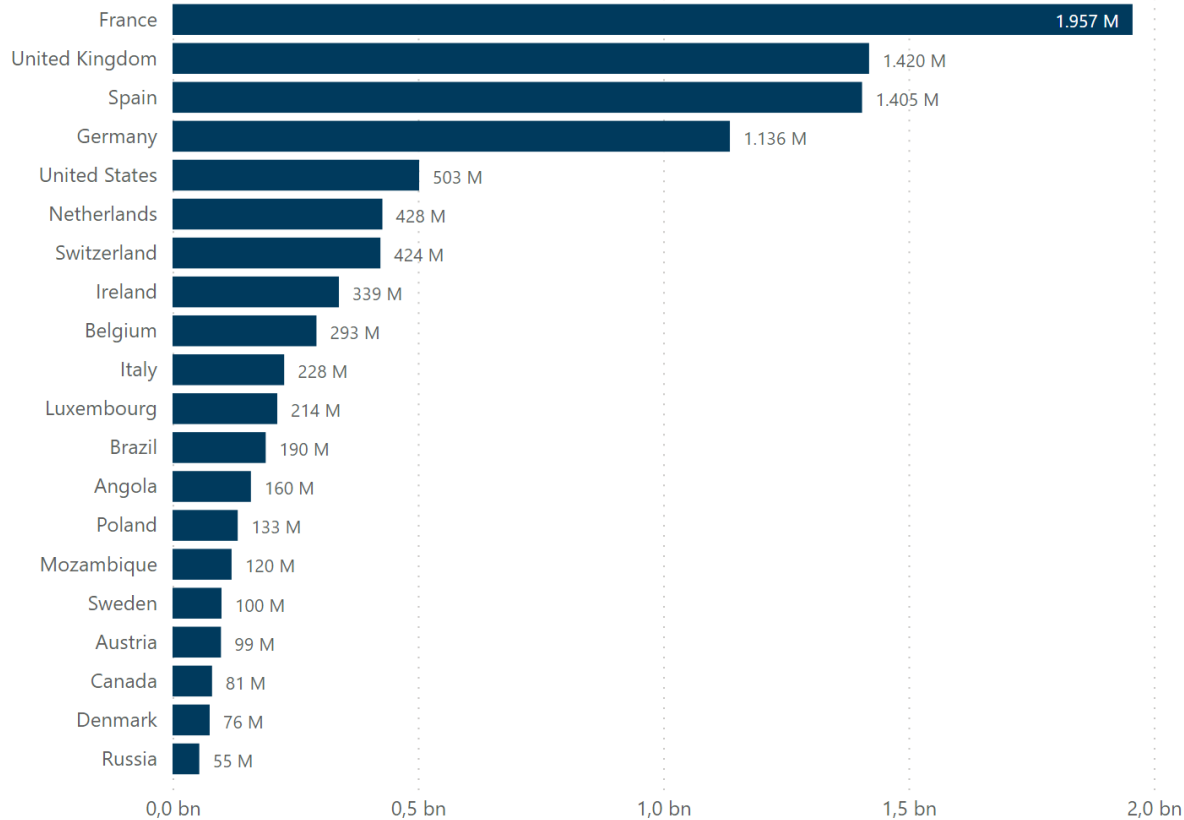
30,3%

Change 21/20

-3,1%

CAGR 21/17

# Portugal | Tourism Receipts- 2021



In 2021, tourism receipts reached 10,063 million euros, a value that was 30% lower than in 2020, in which the amount reached was 7,716 million euros and also lower than 2019 (pre-pandemic year) by 45 %.

The chart on the side depicts the TOP 20 markets for the year 2021. This set of markets represented 93% of total receipts in 2021 and 2020 and 90% in 2019.

Compared to 2020, the following increases stand out:

- Poland 131%
- Denmark 98%
- Austria 78%
- Ireland 76%
- USA 61%
- Belgium 46%
- Spain 40%

Only Canada, Brazil and Russia decreased by 5, 10 and 13%, respectively.

- Compared to 2019, the best results were::

- Luxembourg +2%
- Mozambique -10%
- Belgium -23%
- France -24%
- Spain and Switzerland -28%
- Poland -31%

All other markets registered decreases of more than 40%.

## Technical Datasheet

**Ownership:** © Turismo de Portugal, I.P.

**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