



# Tourism in Madeira 2021

# Madeira | Supply Indicators - 2021



## Establishments

341

48,3%

Change 21/20

2,4%

CAGR 21/17



## Rooms

14,2 K

35,9%

Change 21/20

-3,2%

CAGR 21/17



## Beds

31,3 K

41,2%

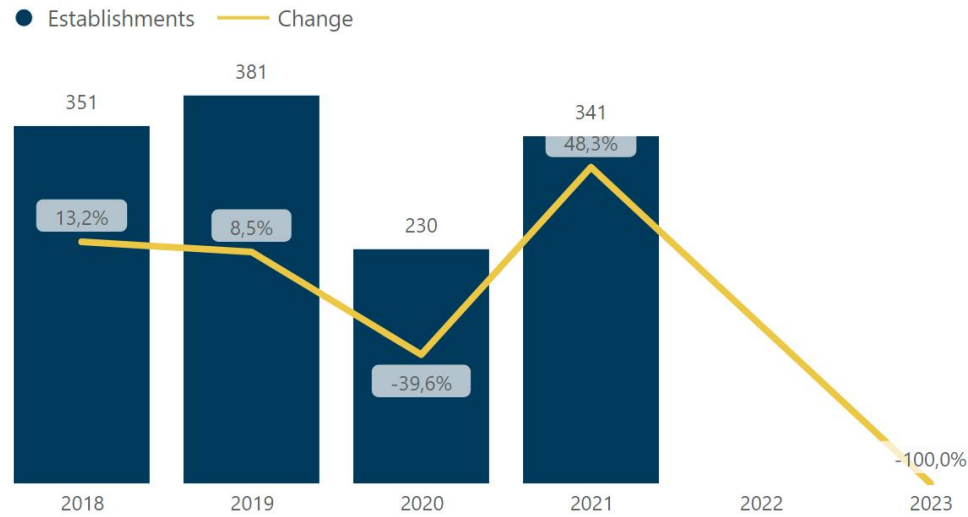
Change 21/20

-2,8%

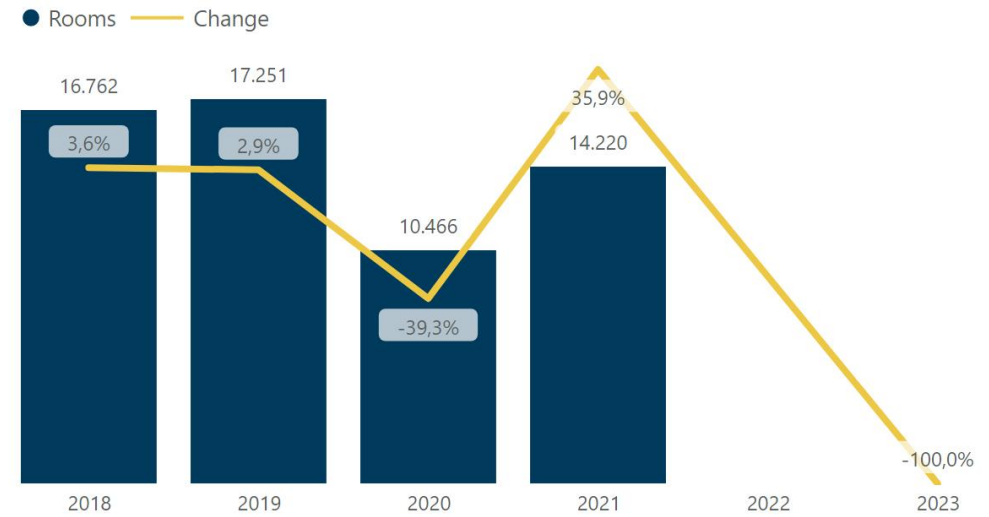
CAGR 21/17

# Madeira | Supply

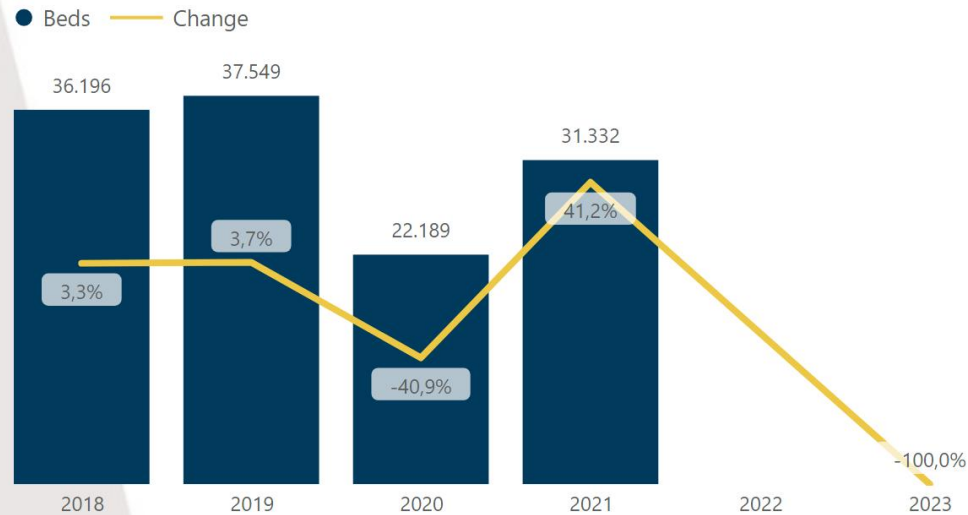
## Establishments (unit - July)



## Rooms (unit - July)



## Beds (unit - July)

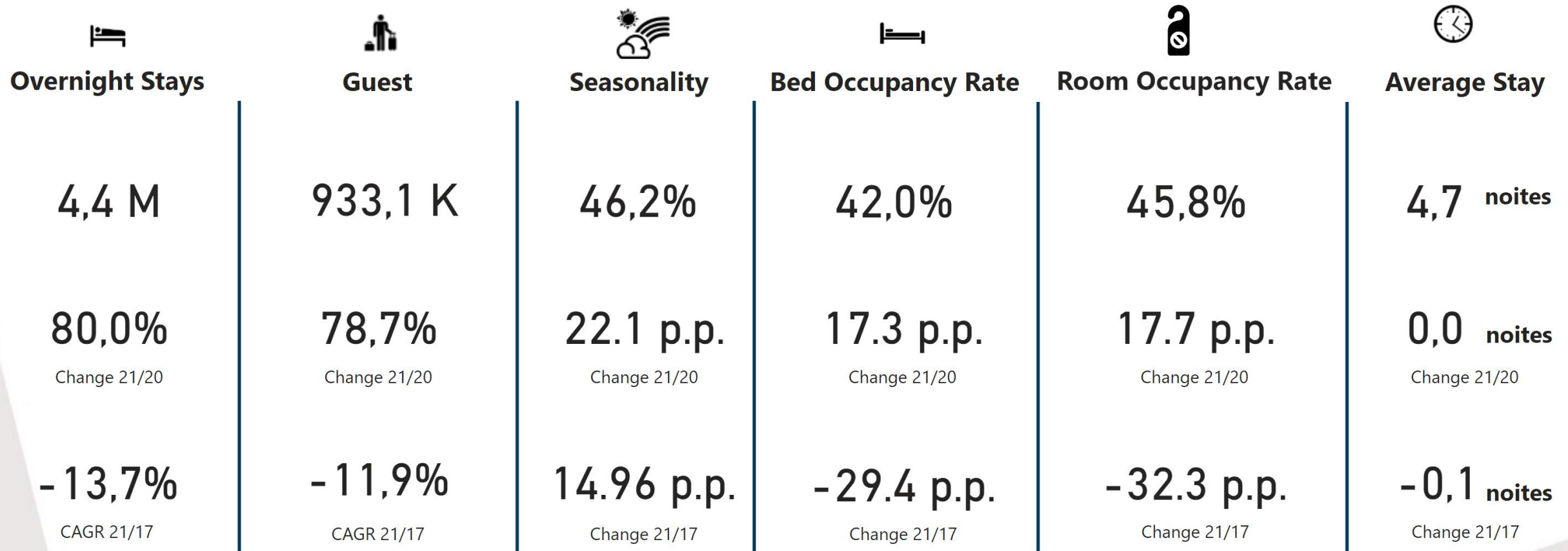


The Autonomous Region of Madeira was also one of the regions where the impact of the Covid-19 pandemic was most felt, with strong downturns recorded in all Tourism indicators, during 2020.

In 2021, despite the still very restrictive constraints, the recovery took place gradually and consistently, but it still did not equal 2019, the pre-pandemic year, with regard to the hotel supply:

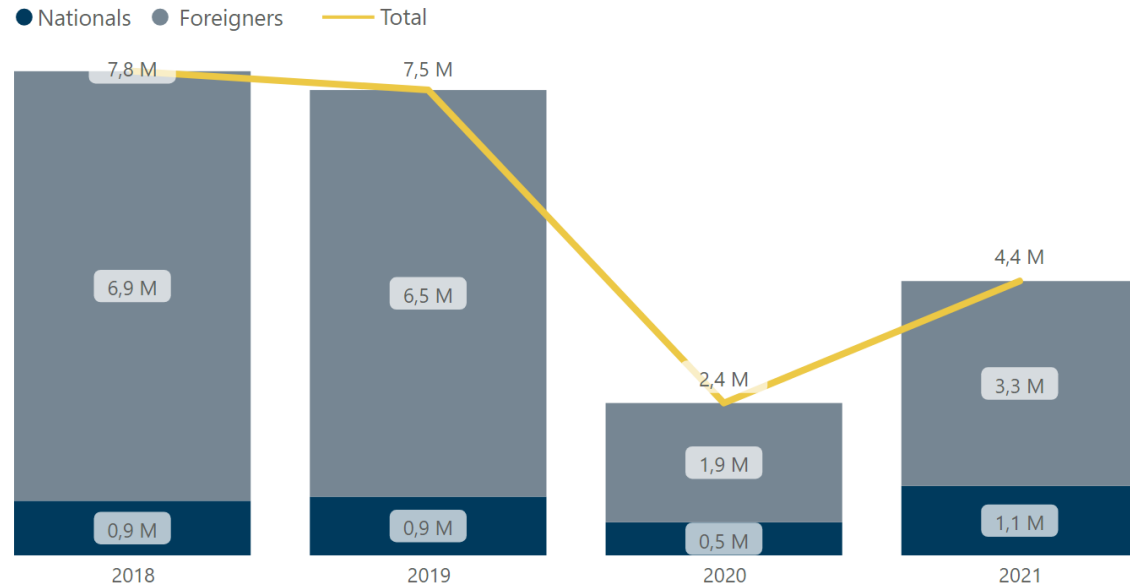
- 341 establishments (+48% compared to 2020, but -10% compared to 2019);
- 14,220 rooms (+36% compared to 2020, but -18% compared to 2019);
- 31,332 beds (+41% compared to 2020, but -17% when compared to 2019).

# Madeira | Demand Indicators - 2021



# Madeira | Overnight Stays

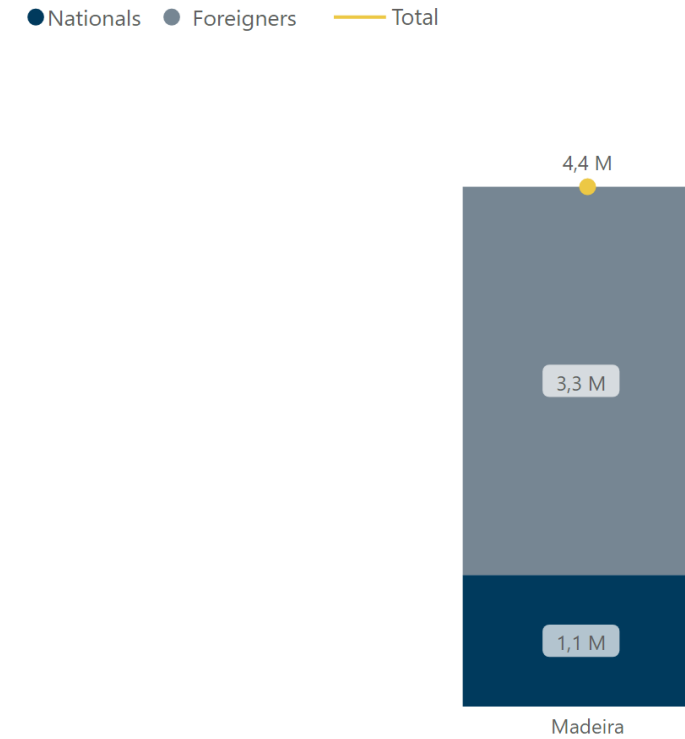
Overnights Stays [million]



Change 21/20

109,6% **Nationals**  
71,8% **Foreigners**  
80,0% **Total**

Overnight stays 2021 by NUTS II [millions]



The recovery trend seen in terms of tourism supply was more favorable than that of demand. AR Madeira was the 4th, with the most pronounced absolute decreases in overnight stays in the country, compared to 2019.

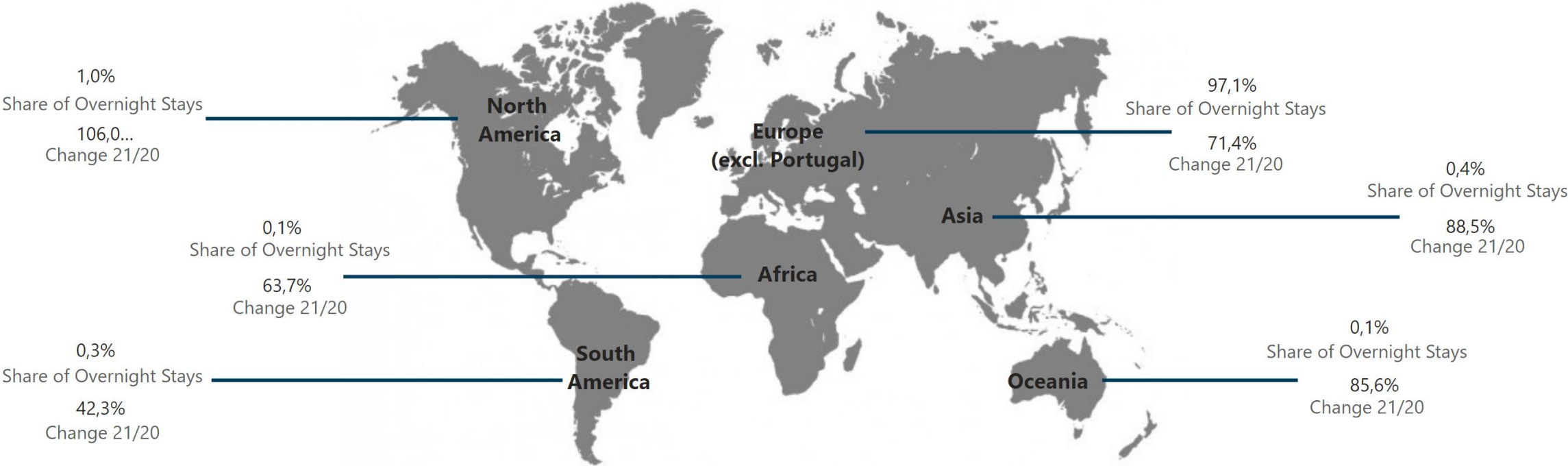
- 4.4 million overnight stays, of which 3.3 million were non-residents and 1.1 million residents. In global terms, almost 2.0 million more overnight stays were booked, compared to 2020 (+80%), but 3.1 million less than in 2019 (-41%);
- Non-residents increased by 72% compared to 2020 (-50% compared to 2019) and residents by 110% (+18% compared to 2019).

AR Madeira was the 3rd with the highest number of overnight stays spent by non residents (18% of the total overnight stays spent by non residents in the country) and the 6th with regard to residents (6% of the total overnight stays spent by residents in the country) .

The strong impact of the pandemic in this region has to do with the large proportion of non-residents who usually have it and who did not travel during 2020 and 2021:

- 2019 → 87%
- 2020 → 78%
- 2021 → 75%

# Madeira | Overnight Stays - 2021

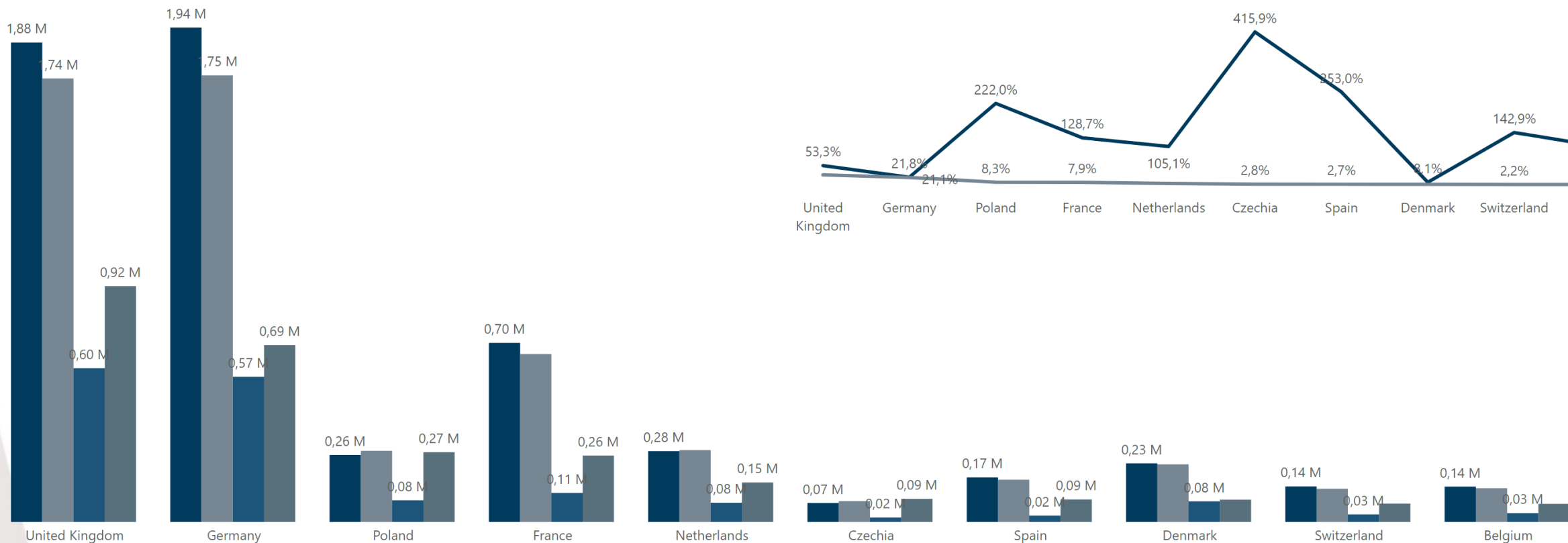


Source: INE - Instituto Nacional de Estatística (definitive data)

# Madeira | Overnight Stays

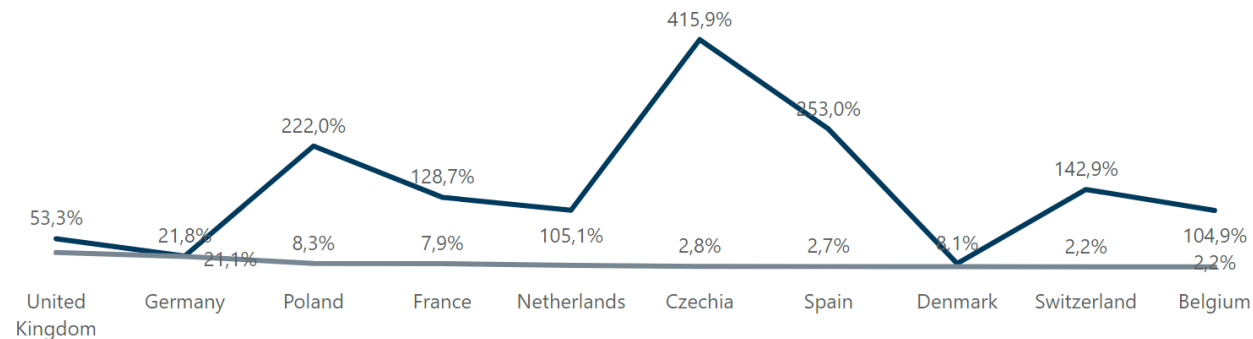
Top 10 Overnight Stays – Source Markets [million]

● 2018 ● 2019 ● 2020 ● 2021



Top 10 Mercados em Variação e Quotas [%]

● Change 21/20 ● Share 2021



In 2021, the group of foreign markets that made up the TOP 10 represented 83% of total external demand (85% in 2020 and 84% in 2019).

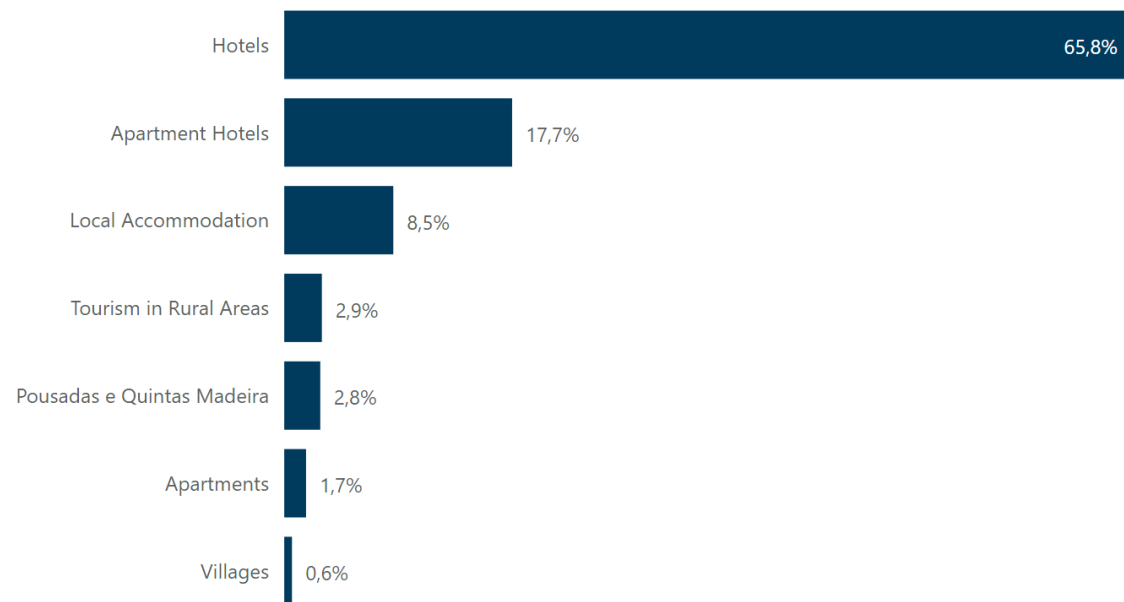
There were changes in the positions of some markets compared to 2020: France and Poland switched positions, the Netherlands rose 1 place, Denmark dropped 3 places, Switzerland and Belgium switched positions and Czechia and Spain entered to the TOP 10 of 2021, leaving Sweden and Finland.

It should be noted that Spain and Denmark, now ranked 7th and 8th, did not enter the TOP 10 of 2019; these places belonged to Sweden and Finland, respectively.

All these markets recorded increases compared to 2020. In relation to 2019, all of them still showed decreases greater than, for the most part, 45%, with the exception of Czechia, which increased by 11%.

# Madeira | Overnight Stays

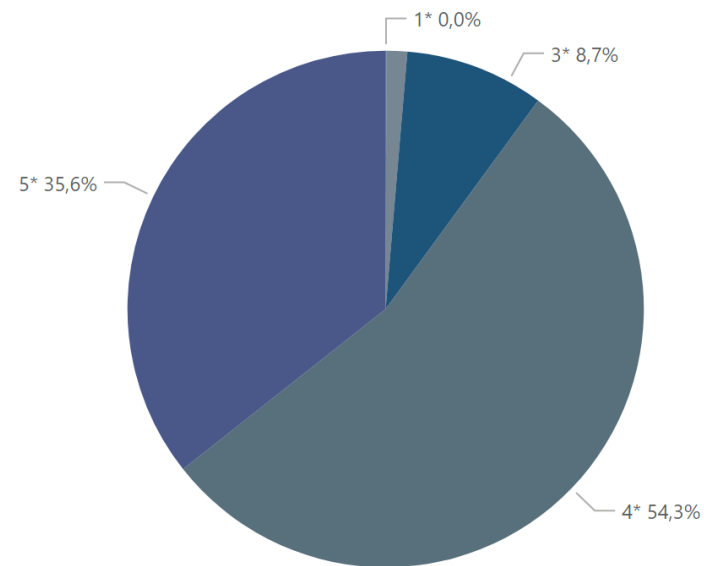
Share of overnight stays in 2021 by type



Hotels were the preferred type of tourists staying in Madeira accommodation units in 2021.

66% of overnight stays were in hotels; apartment hotels followed with 18% of overnight stays and local accommodation occupied 3rd place with 9%.

Share of hotel categories in 2021



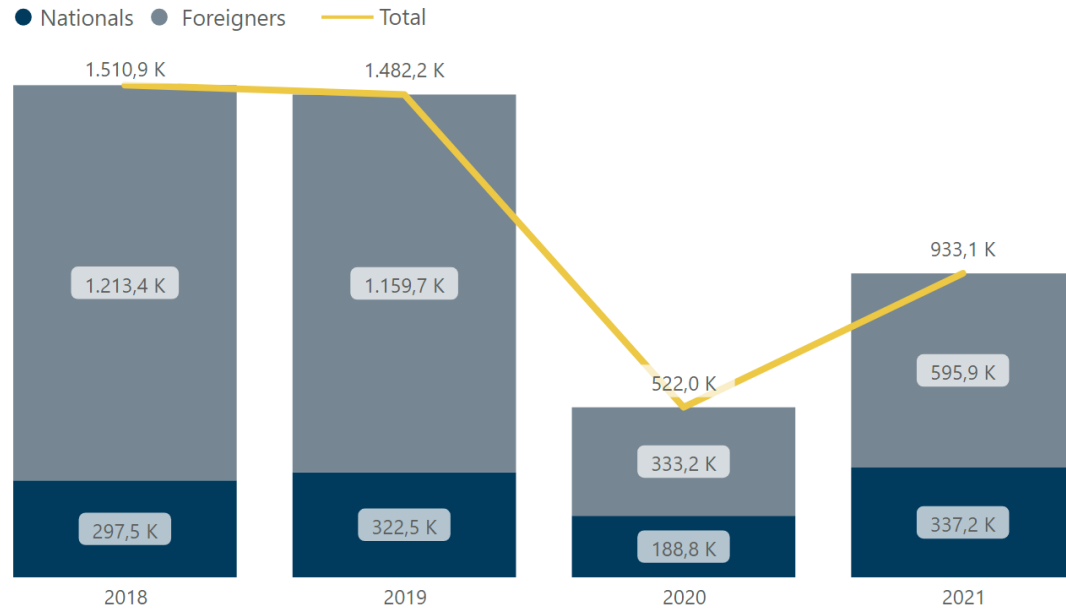
In the "hotel" category, 4\* hotels accounted for more than half of overnight stays in the region (54%), followed by 5\* hotels with 36% and 3\* hotels with 9% of demand.

This distribution has shown homogeneity over the last few years. In 2019, the pre-pandemic year, 4\* hotels recorded a 56% share of overnight stays, 5\* hotels 33% and 3\* hotels 9%.



# Madeira | Guests

Guests [thousands]



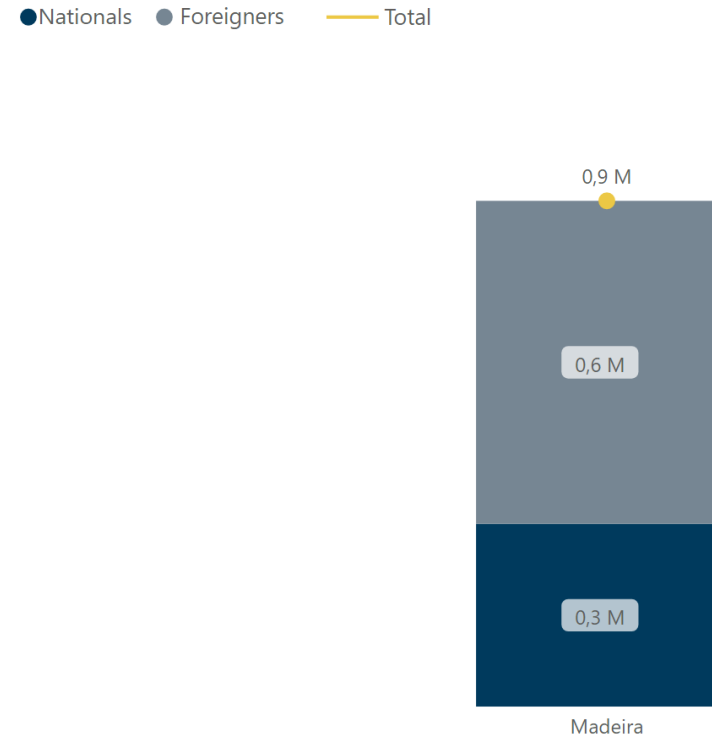
Change 21/20

78,5% **Nationals**      78,9% **Foreigners**      78,7% **Total**

When the reference is guests, and as 2021 was a year that showed recovery, it appears that resident guests are already above the level recorded in 2019.

- Of the 933.1 thousand guests, 595.9 thousand were non-residents and 337.2 thousand were residents. In global terms, there were 411.1 thousand more guests, compared to 2020 (+79%), but 549.2 less than in 2019 (-37%);
- Non-residents increased by 79% compared to 2020 (-49% compared to 2019) and residents also by 79%, but they have already surpassed the figure reached in 2019 by 5%.

Guests 2021 by NUTS II [millions]

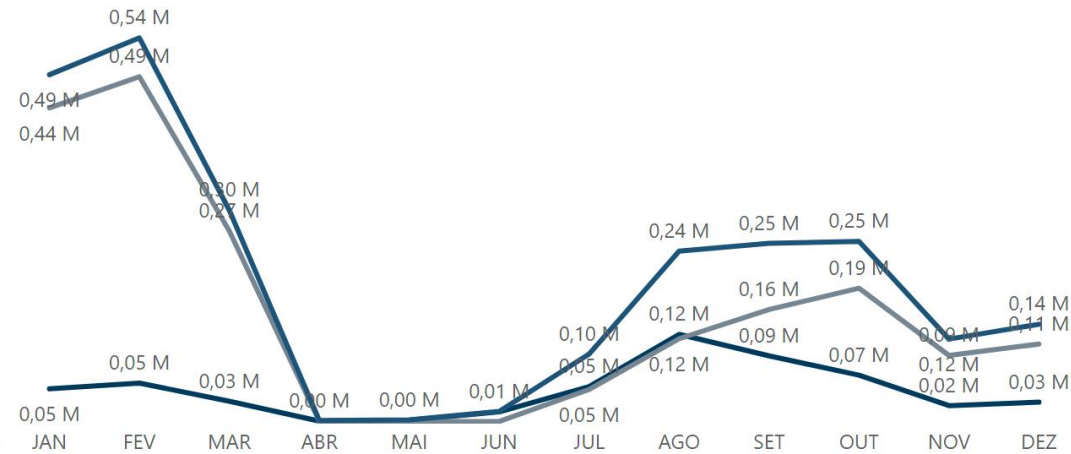


Madeira was, in 2021, the 4th region with the highest number of non-resident guests (10% of the total number of non-resident guests in the country) and the 7th, when the reference is resident guests (4% of the total of guests residing in the country).

# Madeira | Seasonality

Overnight stays 2020 [millions]

● Nationals ● Foreigners ● Total

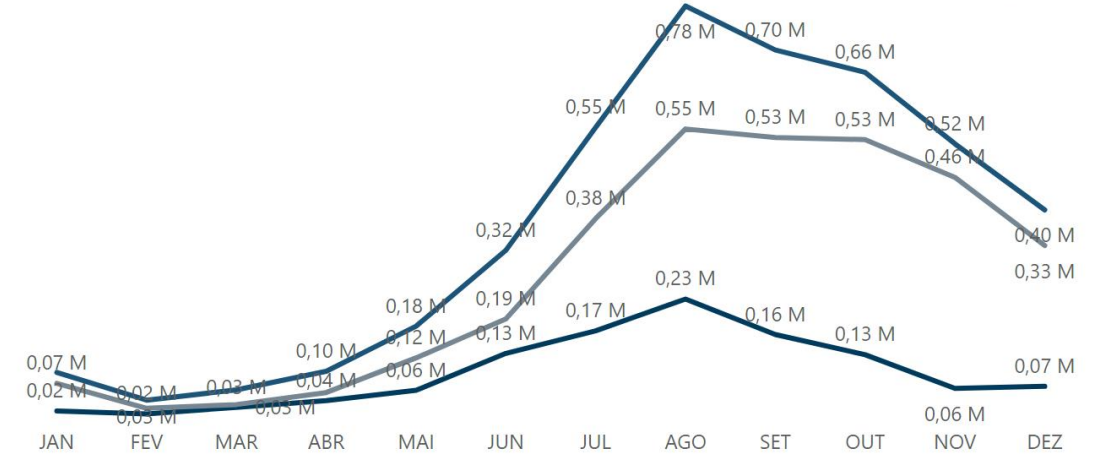


The pandemic experienced in 2020 and 2021 considerably worsened the estimated seasonality indices.

The numbers show this reality and 2021 still comes with values that move away from the historic year for Tourism, which was 2019. Another 15.4 p.p. in the seasonality rate, separate these two years.

Overnight stays 2021 [millions]

● Nationals ● Foreigners ● Total



In this way, of the 30.8% seasonality rate recorded in Madeira in 2019, the year 2020 ended with 24% (-6.8 p.p.). This decrease happened because non-residents, who in 2019 represented 87% of overall overnight stays in the region, decreased by 71% in 2020.

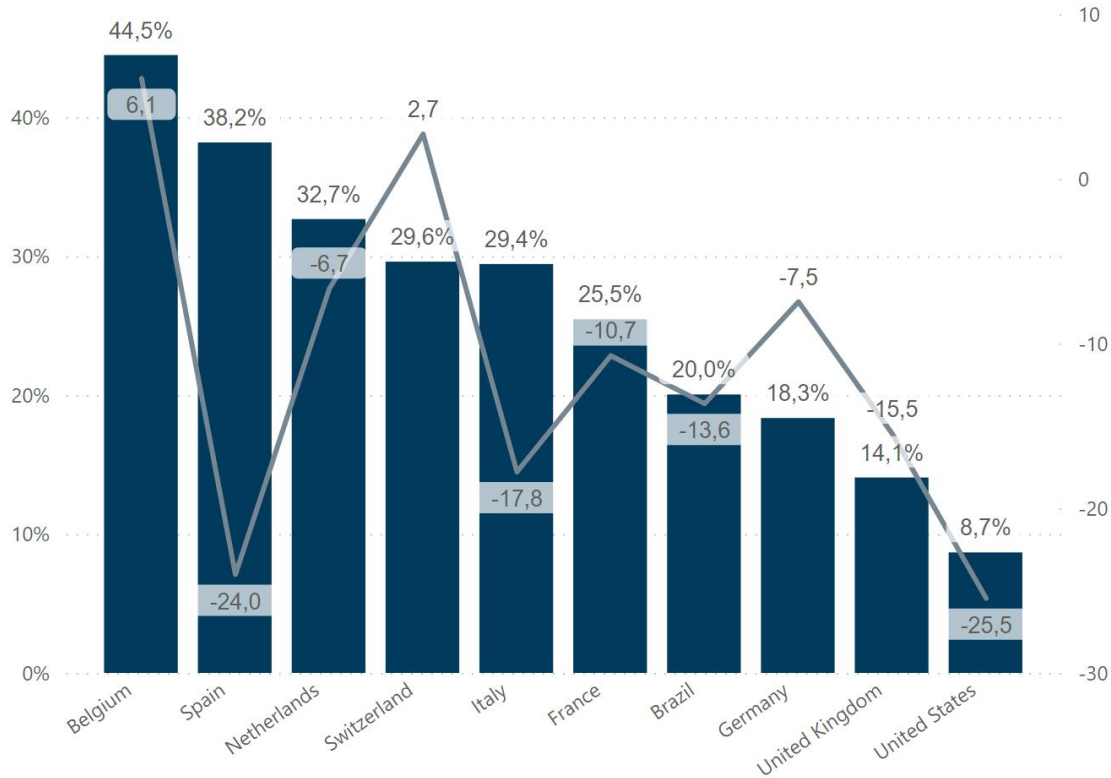
In 2021, the high season in Madeira saw year-on-year increases of 113% in overnight stays from residents (+299.4 thousand) and 356% from non-residents (+1,144 thousand). This evolution, associated with restrictions on traveling at certain times of the year, led to an increase of 22.2 p.p., compared to 2020, in the seasonality rate.

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

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

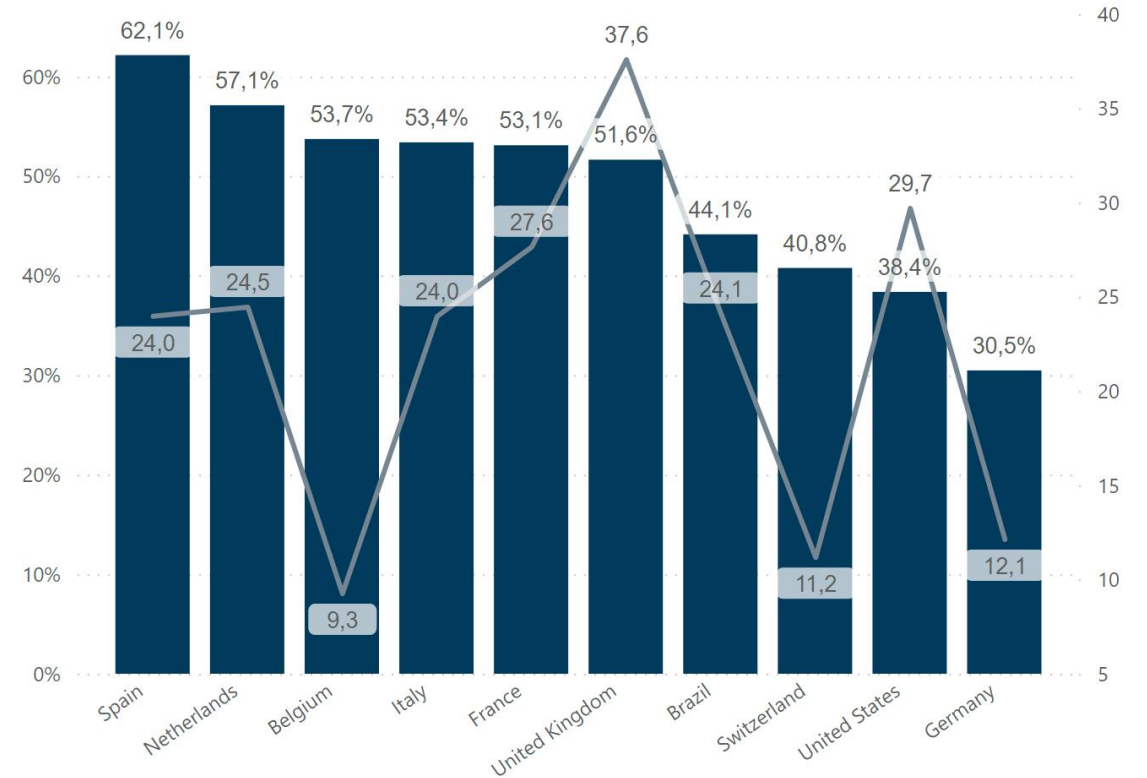
# Madeira | Seasonality

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 in the region, the situation in 2021 was as follows:

- Germany, increased from 25.8% in 2019 to 30.5% in 2021;
- United Kingdom, 29.5% in 2019 and 51.6% in 2021;
- France 36.2% vs 53.1%;
- Netherlands, 39.3% vs 57.1%.

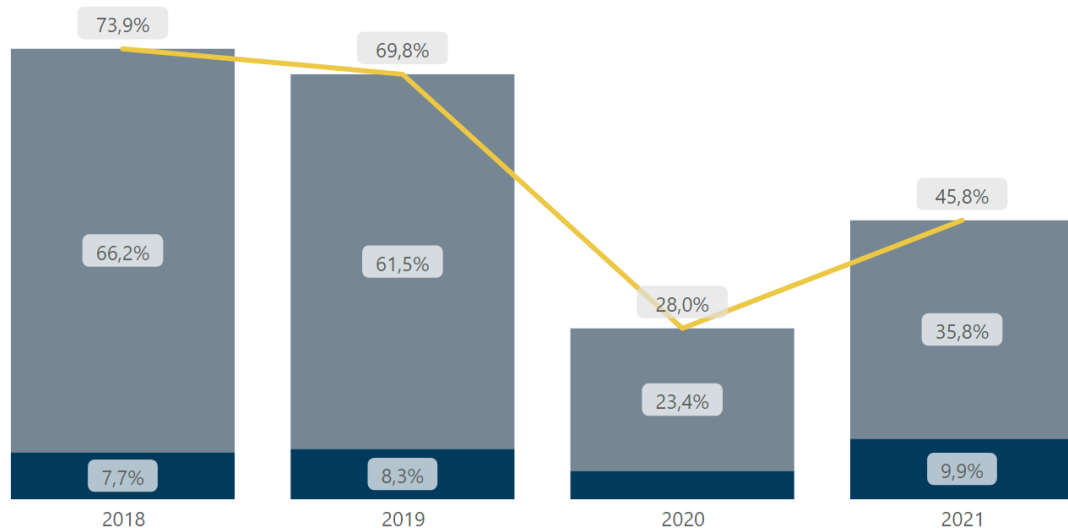
Note: concentration of overnight stays in the months of July, August and September)

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

# Madeira | Occupancy Rates

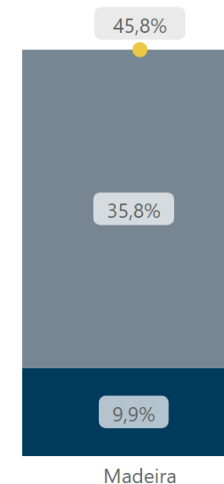
Room Occupancy Rate (ROR) [%]

● 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 sharp declines in occupancy, with greater incidence in foreign guests (from 61.5% of room occupancy in 2019 to 35.8% in 2021, i.e. a decrease of 25.7 p.p. ).

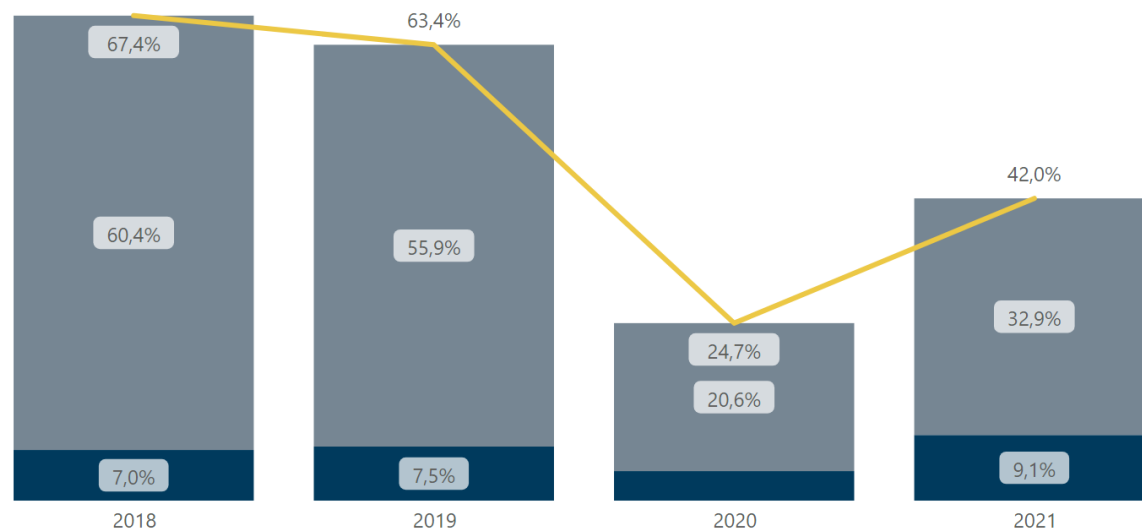
With regard to the Portuguese, many of whom opted to travel to Madeira, there was an increase of 1.6 p.p.. From 8.3% in 2019 to 9.9% in 2021.

Madeira, which, in 2019, was the 2nd region with the highest room occupancy rate (69.8%), occupied, in 2021, the 1st position, with 45.8%, although with a decrease of 24.0 p.p. between the two years.

# Madeira | Occupancy Rates

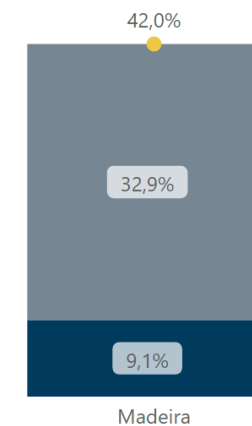
Bed Occupancy Rate (BOR) [%]

● 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 sharp drops in bed occupancy, with greater incidence in guests from abroad (from 55.9% of bed occupancy in 2019, there was a decrease to 32.9% in 2021, that is, a decrease of 23.0 p.p.).

Regarding Portuguese guests, the evolution between the two years was positive (from 7.5% bed occupancy in 2019 to 9.1% in 2021, an increase of 1.6 p.p.).

Madeira, which registered the 1st highest bed occupancy rate with 63.4% in 2019, maintained this position in 2021, although with a lower rate (42.0%).

# Madeira | Profitability Indicators - 2021



**Total Revenue**

**265,4 M**

**104,2%**

Change 21/20

**-10,7%**

CAGR 21/17



**Room Revenue**

**179,0 M**

**110,5%**

Change 21/20

**-9,9%**

CAGR 21/17



**RevPar**

**38,86 €**

**72,4%**

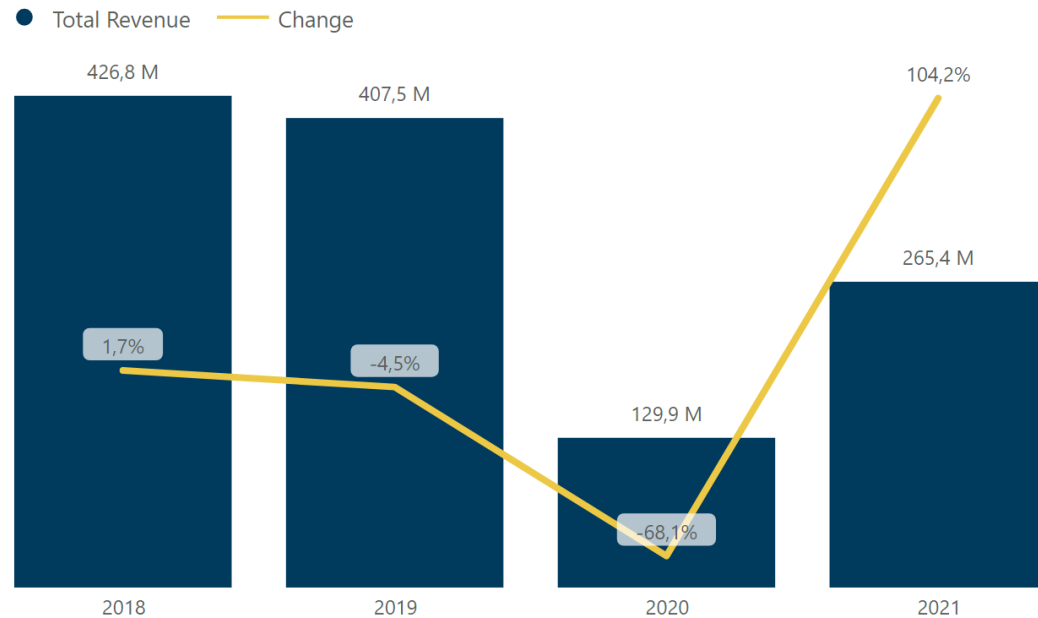
Change 21/20

**-5,2%**

CAGR 21/17

# Madeira | Total Revenue

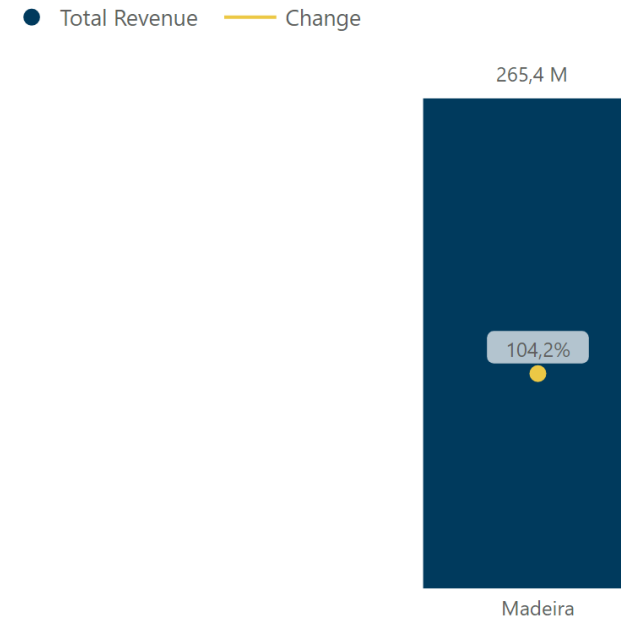
## Total Revenue [million €]



Global revenue from Madeira accommodation units decreased by 68% in 2020, due to the Covid-19 pandemic, but already showed a recovery in 2021, reaching €265.4 million, which translated into an increase of 104% (another €135.4 million).

If we assess the drop seen in 2021 compared to 2019 (pre-pandemic year), the accommodation units earned €142.1 million less in global revenue (-35%).

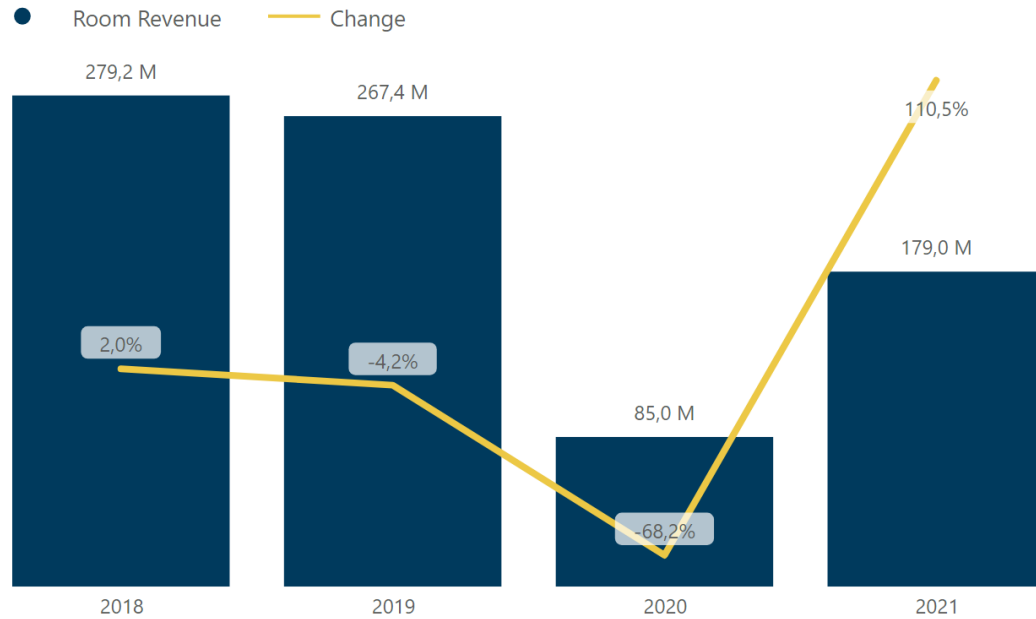
## Total Revenue [million €] by NUTS II



Madeira maintained the 4th position in the country, both in 2019 and in 2021, despite the decrease recorded (-35% of global income).

# Madeira | Room Revenue

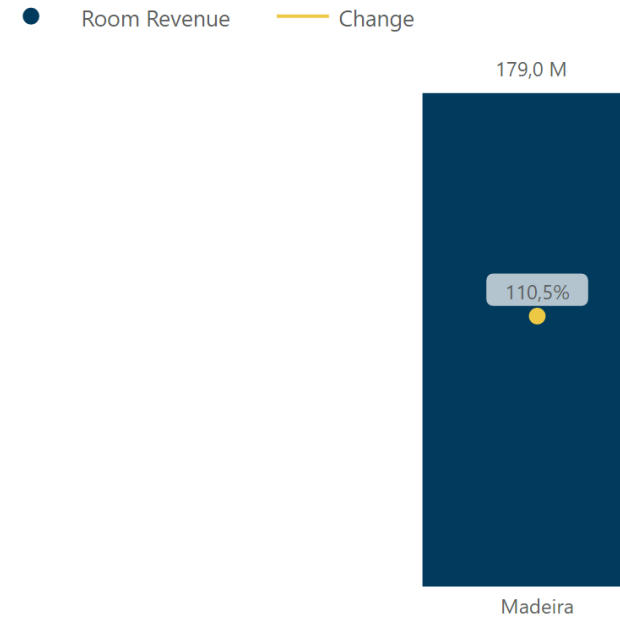
## Room Revenue [millions €]



Room revenue, from Madeira accommodation units, decreased by 68% in 2020, due to the Covid-19 pandemic, but recovered in 2021 with the amount rising to €179.0 million, which translated into a increase of 111% (plus €94.0 million).

If we evaluate the drop seen compared to 2019 (pre-pandemic year), accommodation units earned €88.4 million less in income from accommodation (-33%).

## Room Revenue [millions €] por NUTS II

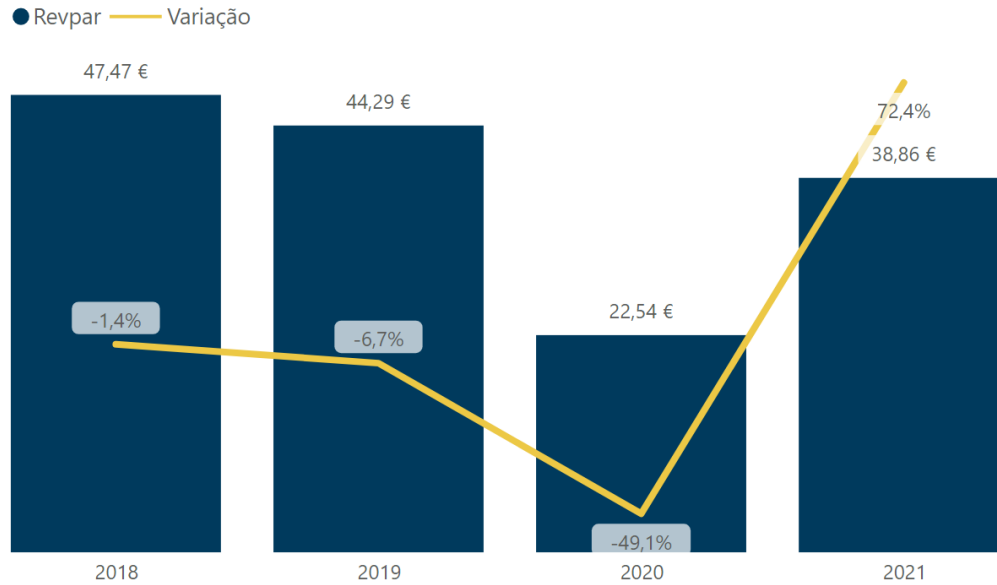


Also, in room revenue, Madeira maintained the 4th position, whether the reference is the year 2019 or 2021, despite the drop seen (-33%).



# Madeira | RevPar

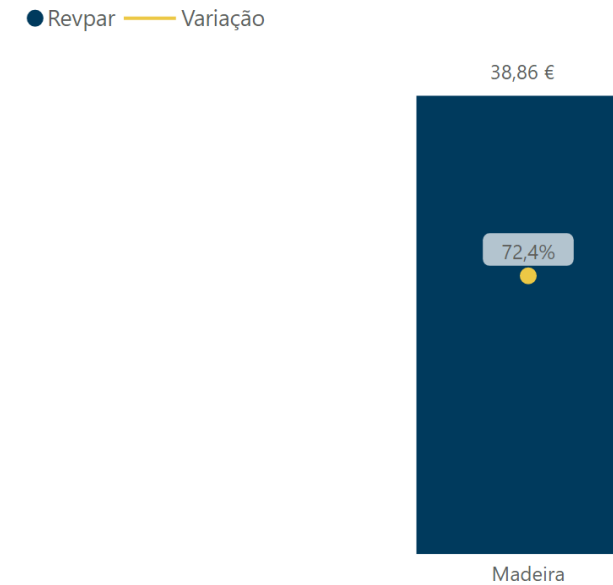
Average revenue per available room (RevPAR) [€]



The average revenue per available room (RevPar) followed the evolution of the other indicators and stood at €22.54 in 2020, the lowest value of the last five years represented here (-€21.75 compared to 2019, i.e. -49%).

A growth of 72% from 2020 to 2021 placed RevPar at €38.86, but still 12% less compared to 2019 (-€5.43).

Average revenue per available room (RevPAR) [€]

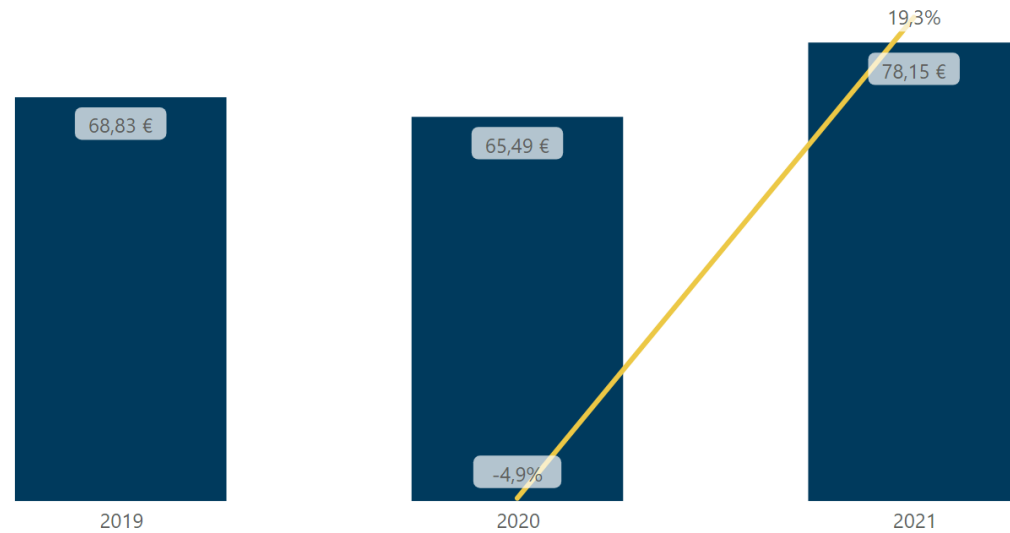


In this indicator, Madeira occupied the 3rd position in 2019 with €44.29, moving in 2021 to the 2nd position with €38.86.

# Madeira | ADR

Average revenue per occupied room (ADR) [€]

● ADR — Variação

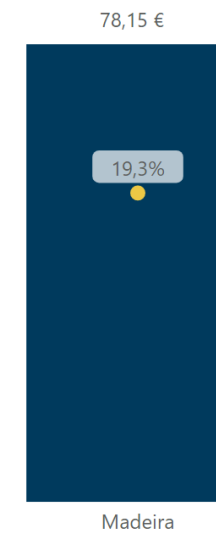


In 2020, the average revenue per occupied room (ADR) accompanied the evolution of the other indicators and stood at €65.49.

Growth of 19% from 2020 to 2021 positioned the ADR at €78.15, a 14% increase (+€9.32) compared to 2019.

Average revenue per occupied room (ADR) [€]

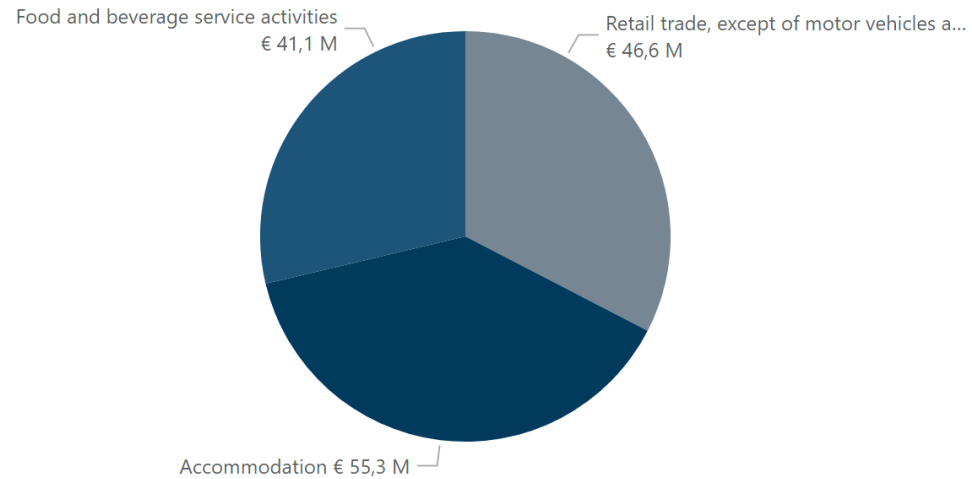
● ADR — Variação



Also in this indicator, Madeira moved from 6th place in 2019 with €68.83 to 4th place in 2021 with €78.15.

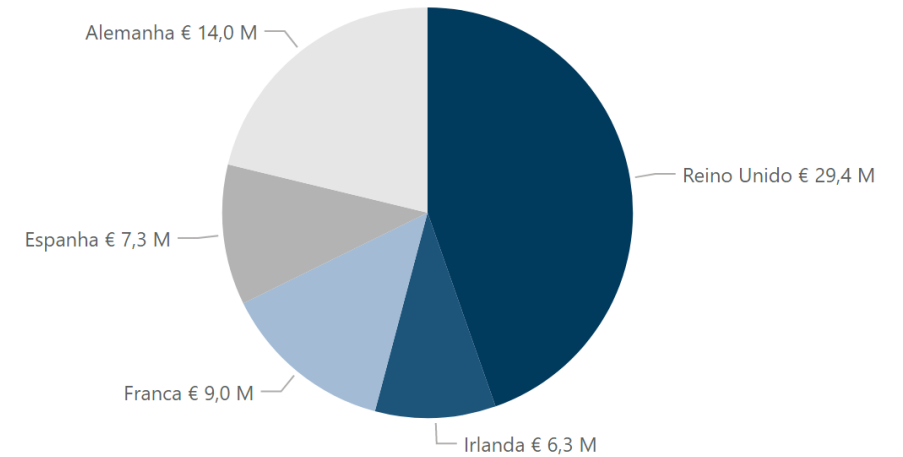
# Madeira | Consumption Profile - 2021

TOP 3 Purchasing Value by ISIC [millions €]



In 2021, the 3 main sectors of activity concentrated 90.9% of total purchases made in the national territory (91.6% 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 67.7% of total purchases made in activities directly linked to Tourism.

In 2019, immediately before the start of the pandemic, the same markets accounted for around 68.3%.

# Madeira | Airport Flows Indicators - 2021



## Passengers Landed

1,0 M

80,9%

Change 21/20

-11,3%

CAGR 21/17



## Seats

2,9 M

63,7%

Change 21/20

-7,9%

CAGR 21/17



## Load Factor

70,8%

4.9 p.p.

Change 21/20

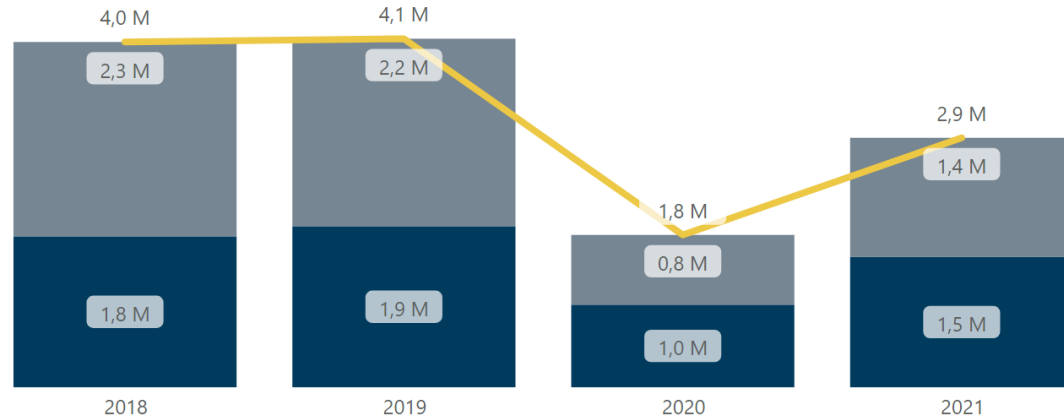
-12.8 p.p.

CAGR 21/17

# Madeira | Airport Flows

Supply of Seats [million]

● Domestic ● Internacional — Total



Change 21/20

58,0%  
**Domestic**

70,5%  
**Internacional**

63,7%  
**Total**

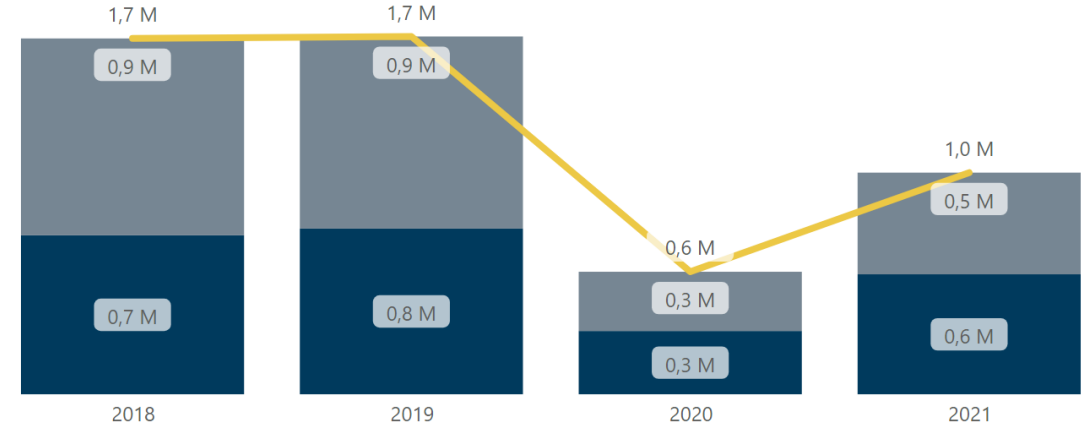
The information disclosed here concerns the airports of Madeira and Porto Santo, together.

The number of seats available in 2021 surpassed by 64% the value of 2020 which, in absolute numbers, translated into an increase of 1.1 million seats (561.5 thousand for domestic flights and 576.6 million for international flights).

If we compare with 2019, we still see drops of 28% for the total (-1.2 million seats), minus 19% for domestic flights (-358.2 thousand seats) and minus 37% for international flights (- 803.4 thousand seats).

Passengers Landed [million]

● Domestic ● Internacional — Total



Change 21/20

89,6%  
**Domestic**

71,6%  
**Internacional**

80,9%  
**Total**

Passengers disembarking at Madeira and Porto Santo airports grew by 81%, from 574.3 thousand in 2020 to 1,034 thousand in 2021 (+464.7 thousand, of which +265.8 thousand were domestic flights and +198.9 thousand international flights).

In comparison with the situation experienced in 2019, it appears that, compared to the 1.7 million passengers disembarked that year, 2021 is still 38% short (-638.3 thousand passengers, of which - 214.4 thousand flights domestic and -423.9 thousand international flights).

## 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

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