



PORTUGAL

Alentejo Sustainable Tourism Observatory

2nd Annual Progress Report

Focal Area: Alentejo NUTS II Region Portugal

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1. Executive Summary

The Alentejo Sustainable Tourism Observatory (ASTO) is a platform that aims to measure and monitor tourism sustainability development in Alentejo territory. ASTO has been a member of INSTO-UNWTO since 2018 and it is hosted by the University of Évora, which is in charge of the scientific coordination of present and future monitoring, studies and reports. ASTO is a platform managed and shared by a number of regional stakeholders, such the Regional Tourism Board of Alentejo and Ribatejo (Turismo do Alentejo e Ribatejo, ERT); the Regional Higher Education System (University of Évora; Polytechnic Institute of Portalegre and Polytechnic Institute of Santarém) and also the National Tourism authority (Turismo de Portugal).

The purpose of this second Annual Progress Reports is to provide an overview of the monitoring activities for each issue area, the operations, performance and lessons identified by ASTO during its second year of implementation, according to the Rules for the Operation and Management of the UNWTO International Network of Sustainable Tourism Observatories (INSTO).

In order to pursue the objectives, the document begins with an update of the destination profile, regarding official data available in the first trimester of 2020. Then, an overall description of the current monitoring process is presented, divided into 8 mandatory issue areas: Tourism Seasonality, Employment, Destination Economic Benefits, Local Satisfaction, Energy Management, Water Management, Waste Water (Sewage) Management, and Solid Waste Management. The available tourism-related data is described to enable stakeholders to evaluate the sector's performance. The last section intends to identify ongoing activities which are currently being implemented and also forthcoming activities that may be implemented next year.

2. Destination Profile of Alentejo Region

Table 1 describes the updated main destination profile indicators for tourism activity in the Alentejo region (NUT II).

Table 1 - Destination Profile of Alentejo Region

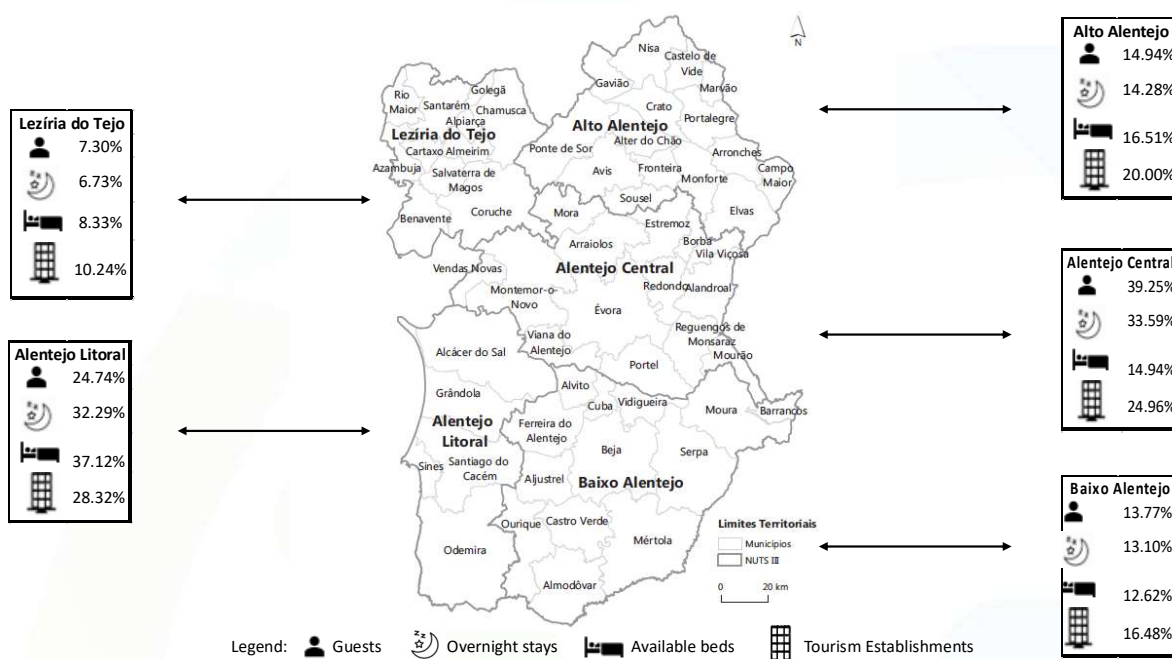
1	Is/Are there Tourism Satellite Account/s (TSA) in the destination country/ies, measuring the economic dimensions of tourism at national level?	<input checked="" type="checkbox"/> YES Last time national TSA was conducted: 2018	<input type="checkbox"/> NO
2	Sector relevance: Contribution of (a) tourism and (b) other economic sectors to the national (and if available local) GDP (%) – latest figures	<p>a) Direct contribution of tourism to the National GDP (2019): 8.7%. (TP₁, 2021).</p> <p>b) National (2019 preliminary results): Trade, vehicle repair, accommodation and food services (19.8%); Financial activities, insurance industry and real estate activities (17.6%); Industry (13.8%); Transport and storage, activities of information and communication (8.5%); Energy, water and sanitation (3.5%); Agriculture, forestry and fishing (2.4%); Construction (4.5%); Other activities and services (29.8%).</p> <p>c) Regional (2017 results): Mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply, water abstraction, purification and supply, sewerage, waste management and remediation activities (23.5%); Wholesale and retail trade, repair of motor vehicles and motorcycles, transportation and storages, accommodation and food service activities (21.1%); Public administration and defence, compulsory social security, education, human health and social work activities (20.4%); Real estate activities (11.6%); Agriculture, livestock production, hunting, forestry and fishing (11.0%); Construction (3.6%); Professional, scientific technical and similar activities, administrative and support service activities (3.5%); Financial and insurance activities (2.3%); Arts, entertainment and recreation, repair of household goods and other services (2.2%); Information and communication activities (0.8%).</p>	
3	Arrivals of inbound (non-resident) visitors for last three years – Thousands	Overnight ¹ : 1.001.351 (2019); 967.541 (2018); 857.349 (2017) Same-day visitors: -- Total: --	
3.1	% of total annual arrivals of inbound (non-resident) visitors occurring in peak month and in peak quarter (indicate which month and quarter)	August (peak month): 14.9% / Peak quarter (3rd): 38.8%	
4	Trips of domestic visitors for the last three years (Thousands)	Overnight: 1,937.479 (2019); 1,708.404 (2018); 1,630.036 (2017) Same-day visitors: -- Total: --	
4.1	% of total annual trips of domestic visitors occurring in peak month and in peak quarter (indicate which month and quarter)	August (peak month): 17.1% / Peak quarter (3rd): 39.9%	
5	Tourism industries: accommodation for visitors in hotel and similar establishments (Units) ²	Number of establishments: 625 (2018) Total rooms: 10,742 (2018) Total bed-places: 23,852 (2018)	
6	Current top 5 primary source markets for the destination	Portugal, Spain, Germany, Brazil, and USA (2019p)	
7	Please describe the destination's experience with other monitoring initiatives/systems	Click here to enter text.	
8	Are there strategies in place for sustainable development of the destination?	<input type="checkbox"/> YES Name of those of relevance: Turismo do Alentejo ERT, the destination's tourism board, is carrying out a sustainability certification process [Biosphere Certification], which has started with the process of Sustainable Tourism Certification for Accommodation for hotels (over 30 hotels in certification process at the moment) and will reach the whole chain of tourism services with the final goal of sustainable certification for the destination. Also, is supporting some actions related with UNESCO Intangible Cultural Heritage classification.	
9	Specify if there are any other initiatives/projects of relevance for the Observatory in the destination (and which)?	Castro Verde Biosphere Reserve; Paul do Boquilobo Biosphere Reserve; Alqueva Tourism Destination Starlight (Dark Sky); Vicentina Route and Grande Rota do Montado.	
11	DMO(s) in monitoring area: Yes/No and year of establishment	<input checked="" type="checkbox"/> YES Year of establishment: 2008	

¹ Tourist accommodation establishments considered: Hotel establishments, Local accommodation [with 10 or more beds] and Rural tourism and Housing tourism (excludes campsites).

² INE (2019). *Estatísticas do turismo: 2018*. INE.

As mentioned in the previous report, NUT II Alentejo integrates 5 NUT III: Lezíria do Tejo; Alto Alentejo; Alentejo Central; Baixo Alentejo and Alentejo Litoral. Figure 1 summarizes the main indicators for these territorial units, highlighting the proportion each NUT III represents in the NUT II Alentejo.

Figure 1 - Proportion of NUT III regions in relation to Alentejo NUT II in Guests, Overnight Stays, Available Beds and Tourism Establishments (2018)³



Source: INE (2020)

As illustrated in Figure 1, in 2018, Alentejo Central had the highest tourism demand concentrating with 39.25% of guests and 33.59% of overnight stays in the Alentejo region. Alentejo Litoral was the region with the highest tourism accommodation capacity with 37.12% of available beds and 28.32% of tourism establishments. Furthermore, Lezíria do Tejo has the lowest tourism demand and accommodation capacity.

Since the Preliminary Report of ASTO, which was submitted in November 2017, some indicators for the Alentejo NUT II region have evidenced some changes in the 2019 report and also in the present report (Table 2).

³ Although the last available official data for the country level [Portugal – NUT I] reports to 2019, for the regional level [Alentejo – NUT II] it reports to the year of 2018.

Table 2 - Evolution since November 2017 (Preliminary Report) until May 2020 (Current Report)

Indicator	2017 Report	2019 Report	2020 Report
Direct contribution of tourism to the national GDP	6.9% (2016)	8.2% (2018)	8.7% (2019)
Arrivals of inbound (non-resident) visitors for the last 3 years	699.2 (2016)	967.5 (2018)	1.001.3 (2019)
	627.6 (2015)	857.3 (2017)	967.5 (2018)
	537.8 (2014)	699.2 (2016)	857.3 (2017)
Trips by domestic visitors for the last three years	1,435.1 (2016)	1,708.4 (2018)	1,937.5 (2019)
	1,296.7 (2015)	1,630.0 (2017)	1,708.4 (2018)
	1,126.5 (2014)	1,435.1 (2016)	1,630.0 (2017)
Current top 5 primary source markets for the destination	Portugal, Spain, France, Germany, Brazil (2016)	Portugal, Spain, Germany, France, Brasil (2018)	Portugal, Spain, Germany, Brazil, USA (2019)

Source: Turismo de Portugal (2020)

As it can be observed in Table 2, the direct contribution of tourism to the national GDP grew from 6.9% (2016) to 8.7% (2019). This growth tendency can also be identified in the trips by domestic visitors, indicator with a growth of 18.1% from 2017 to 2019, while the arrivals of inbound (non-resident) visitors registered a growth of 15.0% in this period.

In terms of the top 5 primary source markets for the destination, Portugal is still the leading market; followed by the Spanish market, the German market in 2019 was the 3rd biggest consumer in the region, the Brazilian market dropped to the 4th place and the USA market was always the 5th biggest consumer in the region.

3. Process of Monitoring Issues

To accomplish its objective of monitoring sustainability in the 8 areas, ASTO team searched for data available at the official entities data bases and found several indicators with different level of geographic desegregation. The collected data is organized and analysed in the following sections.

3.1. Economic Value

Tourism is an important economic activity with a great impact in the Alentejo region, as it can be seen looking to the indicators on Table 3.

Table 3 - Destination Economic Benefits

Sustainability Indicator	Year	Destination Economic Benefits	
Relative direct contribution of tourism to the destination's economy (% GDP)	2019 ^p	Portugal – 8.7% Alentejo – n.a.	
Average length of stay of tourists (nights)	2018 ^p	Average length of stay	Portugal 2.7 Alentejo 1.8
		Residents	2.0 1.8
		Non-residents	3.1 1.8
% of locally produced food, drinks, goods and services sourced by the destination's tourism enterprises	2017	Portugal – 68.9% Alentejo – 53.3%	
Average annual growth of overnight stays (%)	2010/19	Portugal – 7.2% Alentejo – 10.7%	
Annual average growth of accommodation capacity	2014/18	Portugal – 4.3% Alentejo – 5.3%	

Source: Turismo de Portugal (2020); INE (2020) (see Appendix 1 - Table 1 to 3)

In 2018, the average length of stay in the Alentejo region was 1.8 nights for internal tourism, both residents and non-residents. The NUTIII region with the highest average length of stay, in 2018, was Alentejo Litoral (2.4 nights) and the lowest was verified in Alentejo Central (1.5 nights) (see Table 1, Appendix 1).

From 2010 to 2019, overnight stays in the Alentejo region increased 10.5% per year, while national overnight stays grew 7.2% per year. As shown in Table 2 of Appendix 1 [p. 14], over the last 9 years the region maintained a level of approximately 3% of the overnight stays of the country.

From 2014 to 2018, as a response to the growth in tourism demand, the accommodation capacity of the region grew 5.3%, in average, per year. In this period of time, the region maintained a level of approximately 6% of the accommodation capacity of the country, as can be confirmed in Table 3 of Appendix 1.

Table 4 - Employment

Sustainability Indicator	Year	Employment
% of jobs in tourism that are seasonal	2017	Portugal – 14.8% Alentejo – 23.7%

Source: Turismo de Portugal (2020)

According to Turismo de Portugal (TravelBI, 2020), nearly 24% of tourism jobs in Alentejo were seasonal in 2017, which implies that 76% were stable all over the year.

Table 5 - Tourism Seasonality

Sustainability Indicator	Year	Tourism Seasonality			
		Annual Bed Occupancy Rate		Annual Room Occupancy Rate	
Occupancy rate in commercial accommodation per month and average for the year	2019	Portugal	Alentejo	Portugal	Alentejo
		52.4%	42.8%	65.6%	57.1%
Seasonality Rate	2019	Portugal – 36.3% Alentejo – 39.5%			
% of hotels open year-round	2018	Portugal – 88.1% Alentejo – 88.6%			

Source: Turismo de Portugal (2020) (see Appendix 2, Tables 1 and 2)

As reported by Turismo de Portugal (TravelBI, 2020), the region annual average for both types of occupancy rates (bed and room) is considerably lower than the national ones. As can be seen in Table 1 of Appendix 2 [p. 15], both the national and regional monthly occupancy rate revealed wide seasonality with a peak in August and September.

The Alentejo region tourism seasonality rate is 39.5%. The most seasonal inbound market is the French one with a seasonal rate of 47.9%, and the most stationary is the Brazilian with a seasonal rate of 38.0%. Domestic tourism has a high seasonality rate of 39.9%. These values are represented

in Table 2 of Appendix 2. Even though there are low seasons with occupancy rates around 20.0%, 88.6% of the region's hotels stay open all year long.

3.2. Social Indicators

According to Turismo de Portugal (2020), in 2018 the tourist density registered in the Alentejo region was 59 overnight stays per km², which represents one tenth of the tourist density of Portugal (Table 6). Concerning the tourist intensity index, in 2018 the Alentejo region recorded 2550 overnight stays per 1000 residents, approximately half of the value registered in Portugal, and there are 18 available beds per 1000 residents in the Alentejo region, which is more than half of the national value (Table 6). The remaining results are pending an ongoing project of the observatory.

Table 6 - Local Satisfaction with Tourism

Sustainability Indicator	Year	Local Satisfaction
Tourist density (overnights/km²)	2018	Portugal – 625 Alentejo – 59
Tourist intensity (overnights/1000 residents)	2018	Portugal – 5,426 Alentejo – 2,550
Available beds per 1000 residents	2018	Portugal – 28 Alentejo – 30
% of residents who are satisfied with tourism in the destination (per month/season)	--	These results are pending an ongoing project of the observatory
% of residents who are satisfied with the impacts of tourism on the destination's identity	--	These results are pending an ongoing project of the observatory

Source: Turismo de Portugal (2020)

3.3. Environmental Indicators

In terms of energy and water management, the Alentejo region achieved interesting good results when comparing with the national 'picture' in this regard (Table 7). Thus, 73.2% of lodging establishments took limiting energy consumption as an objective and 73.2% reducing water consumption.

The Alentejo region evidenced good results in the top 5 measures to reduce both water and energy consumption. Nevertheless, there are two indicators that registered less significant results. Concerning the top 5 energy-saving measures, only 58.3% of tourist enterprises have a "lighting system activated by card", and for the top 5 measures to reduce water consumption, only 18.6% of tourist enterprises have "timers in the taps". It should be highlighted that the region percentage of treated and potable water is 99.1%, which is a remarkable result (Table 7).

Table 7 - Energy Management and Water Management

Sustainability Indicator	Year	Energy Management		Water Management		
% of lodging establishments with objectives to limit energy consumption	2017	Portugal – 56.3%				
		Alentejo – 73.2%				
Top 5 energy saving measures	2016			Portugal	Alentejo	
		Class A appliances or superior		66.3%	63.3%	
		Thermal and acoustic insulation of windows, waterproof frames		79.4%	75%	
		Energy-saving light bulbs		96.6%	93.3%	
		Air conditioning Acclimatization system with intensity adjustable by the customer		90.0%	95.0%	
% of tourism enterprises taking actions to reduce water consumption	2017	Portugal – 63.0%				
		Alentejo – 62.0%				
% of tourism enterprises with objectives to reduce water consumption	2017	Portugal – 56.3%				
		Alentejo – 73.2%				
% of treated and potable water in destination	2016	Portugal – 98.7%				
		Alentejo – 99.1%				
Top 5 measures taken to reduce water consumption	2016			Portugal	Alentejo	
		Low consumption flushing system		73.0%	71.2%	
		Guests invited to communicate any loss of water		76.5%	62.7%	
		Change of towels and sheets requested by guest or according to the minimum legal required		92.6%	89.8%	
		Water flow reducers in taps and showers		70.0%	55.9%	
		Timers in taps		31.2%	18.6%	

Source: Turismo de Portugal_b (2020)

Different types of waste are separated by 57.20% of the tourism enterprises in the Alentejo region. This result is slightly lower than the one registered for the whole country (63%) (Table 8).

Table 8 - Waste Water Management and Solid Waste Management

Sustainability Indicator	Year	Waste Water (Sewage) Management		Solid Waste Management	
% of tourism enterprises separating different types of waste	2017	Portugal – 63.0%			
		Alentejo – 57.0%			

Source: Turismo de Portugal_b (2020)

In the Alentejo region, 39 resort areas are registered as certified due to their sustainability efforts, which represents 10% of the national resort areas. Additionally, in 96.9% of the resort areas, the water is considered to be of good/excellent quality (Table 9). Furthermore, is noteworthy that 44.8% of the tourism enterprises/establishments are using voluntary certification/labelling for environmental/quality/sustainability factors and/or Corporate Social Responsibility, and 78.6% provide training/information on sustainable practices to their collaborators (Table 9).

Table 9 - Other Indicators

Sustainability Indicator	Year			
Resort areas that are certified for their sustainability efforts	2018	Portugal – 378 Alentejo – 39		
		Portugal	Alentejo	
% of water in resort areas that is considered good / excellent quality when compared to the rest of the water in the destination	2017	N of resort areas with water considered good/excellent	603	32
		% of water in resort areas considered good/excellent	95.4%	96.9%
		N of resort areas with water considered good	46	0
		N of resort areas with water considered excellent	529	31
% of tourism enterprises that provide training / information on sustainable practices to their collaborators	2017	Portugal – 62.0% Alentejo – 78.6%		
Environmental spending per inhabitant	2018	Portugal – € 69.9 Alentejo – € 76.9		
% of tourism enterprises / establishments in the destination using voluntary certification / labelling for environmental / quality / sustainability factors and/or Corporate Social Responsibility	2016	Portugal – 38.5% Alentejo – 44.8%		
% of tourism establishments available for guest with special needs	2017	Portugal – 65.0% Alentejo – 58.9%		

Source: Turismo de Portugal, (2020); INE (2020)

4. Final Reflections

Considering the actions planned in the last report, ASTO developed the following tasks/activities:

- 1) The ASTO website (<http://www.asto.pt>) was accomplished, but social network pages are still in progress.
- 2) Survey regarding the Local satisfaction with tourism: this task was concluded on February 2020, until when a total of 2620 surveys in 34 municipalities were applied (with a sample error of 1.91%) and a global report was presented to the Entidade Regional de Turismo do Alentejo (ERTA - regional tourism entity), that founded part of the study. The main results and the report will be available soon in the ASTO website.
- 3) Constitution of the Local Working Group (LWG): the strategic tourist agents were identified and the contacts and invitations were in progress. This task was developed in partnership with the ERTA.

The previous tasks were made with the financial support from CIDEHUS research unit of the University of Évora, Turismo de Portugal, I.P. (national tourism entity) and ERTA. Other important activities were developed, such as:

- 1) Participation at the 2019 Global INSTO Annual Meeting in 2019 with all the main team of ASTO: “Alentejo Sustainable Tourism Observatory (ASTO) - From the knowledge gathering to the knowledge sharing”.

- 2) The 1st report on environment issues (Energy Management, Water Management, Waste Water (Sewage) Management, and Solid Waste Management) was concluded on December 2019.
- 3) The 1st report on Economic Benefits and Employment was concluded on March 2020.
- 4) The 1st report on Seasonality was concluded on May 2020.
- 5) Participation in a scientific conference:
 - i) Organization of the thematic panel “Placed-based knowledge sharing models and tools towards a more sustainable tourism destination” (Special Session SS26) and communication presentation “Alentejo Sustainable Tourism Observatory (ASTO): Scientific knowledge helping sustainable tourism implementation in real life”, in 26th APDR Congress “Evidence-based territorial policymaking: formulation, implementation and evaluation of policy”, University of Aveiro, Portugal, 4-5 July 2019.
 - ii) Participation in a local fair EXPOALENTEJO placed in the city of Elvas (01.02.2020). The main focus of this public presentation was to start the promotion of ASTO to the main municipalities of the Alentejo Region.
- 6) Visit to Tourism Observatory of the City of Buenos Aires (Argentina), 3 December of 2019.

Another important achievement of ASTO team was the financial support obtained regarding the PISTA project (reference ALT20-03-0246-FEDER-000059 Portugal 2020), financed by Programa Operacional Alentejo 2020 and FEDER. This project was designed by the ASTO team and aims to promote the growth of sustainable tourism services through the transfer of existing knowledge in the regional R&D system, contributing to the promotion of a sustainable tourist destination, recognized as one of excellence. PISTA is brought about through a set of initiatives and technologies and contact with regional tourist agents, it is expected that this project will enable the knowledge generated in recent years (particularly the one generated the ASTO team) to add value to the regional economy.

During the next year ASTO intends to focus on the following initiatives: to define the most adequate technologic solution to knowledge management regarding indicators for the thematic areas; to continuously update the information on the main indicators and move forward with addressing other areas; to keep close contact with our partners and specialists in the field of sustainable tourism in order to find new strategies and pathways to achieve the UNWTO INSTO goals and the considering also the challenges that COVID-19 pandemics brought to tourism.

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Appendices

Appendix 1 | Destination Economic Benefits

	Regional Average Length of Stay	Average Length of Stay of Inbound Tourism
Portugal	2.7	3.1
Alentejo	1.8	1.9
Alentejo Litoral	2.4	2.6
Baixo Alentejo	1.7	1.9
Lezíria do Tejo	1.7	2.0
Alto Alentejo	1.7	1.7
Alentejo Central	1.5	1.5

Legend: (a) Includes Hotel establishments, Local accommodation and Rural tourism and Housing tourism

Source: INE (2019)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Annual Average Growth(%) 2010'19
Portugal	37391291	39440315	39681040	41569716	48711366	53074176	59122640	65385210	67662103	70158964	7.24%
Alentejo	1172558	1243652	1142145	1113427	1664296	1924308	2134313	2487385	2675945	2938830	10.75%
Proportion (%)	3.14%	3.15%	2.88%	2.68%	3.42%	3.63%	3.61%	3.80%	3.95%	4.19%	--

Source: Turismo de Portugal (2020)

	2014	2015	2016	2017	2018	Annual Average Growth (%) 2014'18
Portugal	342 497	362 005	380 818	402 832	423 152	4.32%
Alentejo	18 374	21 472	22 779	22 861	23 852	5.36%
Proportion (%)	5.36%	5.93%	5.98%	5.68%	5.64%	--

Legend: (a) Includes Hotel establishments, Local accommodation and Rural tourism and Housing tourism

Source: INE (2020)

Appendix 2 | Tourism Seasonality

Table 1 – Occupancy Rate in Commercial Accommodation per Month and Average (2019^(p))

	Bed Occupancy Rate (%)		Room Occupancy Rate (%)	
	Portugal	Alentejo	Portugal	Alentejo
January	29.28%	22.11%	41.79%	36.03%
February	35.67%	24.68%	49.62%	40.49%
March	44.23%	33.11%	59.70%	47.90%
April	55.50%	46.16%	68.73%	66.97%
May	55.29%	42.18%	71.89%	59.61%
June	60.60%	46.97%	73.95%	59.90%
July	67.63%	58.75%	75.03%	63.90%
August	77.81%	73.62%	82.03%	77.57%
September	66.01%	57.31%	81.94%	74.62%
October	55.36%	42.51%	72.72%	64.45%
November	40.86%	34.87%	57.50%	51.11%
December	37.30%	29.58%	48.34%	43.38%
Average of the year	52.13%	42.65%	65.27%	57.16%

Legend: 'p' preliminary data; do not includes 'Local accommodation', 'Rural tourism and Housing tourism and campsites.

Source: Turismo de Portugal (2020)

Table 2 – Seasonality in the Alentejo Region, by main markets (2019^(p))

	Total of Overnight Stays (N)	Seasonality Rate (%)	Ratio of Seasonal Amplitude
Alentejo (main markets)	2 879 101	39,51%	3,06
Portugal	1 893 206	39,93%	2,82
Spain	208 667	47,80%	4,00
Germany	102 177	38,27%	5,24
Brazil	92 599	38,04%	2,67
USA	91 543	43,79%	5,68
France	83 598	47,86%	5,87
United Kingdom	65 003	41,32%	4,81
Netherlands	47 539	40,72%	5,38

Legend: (p) preliminary data

Source: Turismo de Portugal, TravelBI (2020)