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**Alentejo Sustainable
Tourism Observatory**
3rd Annual Progress Report
Focal Area: Alentejo NUTS II Region Portugal
2021. Edition

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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 third 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 third 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 date available in the first trimester of 2021. 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.

The definitive data for most of the indicators provided by INE and Turismo de Portugal will only become definitive in December of the year following the desired date (for example: the final data for 2019 was last updated on 12/31/2020). This fact implies that in each report the current data is always provisional, and may cause slight differences for the following one. We assume these differences are a result of some improvements and changes in the official websites due to its novelty and need for some adjustments over time and due to changes in estimated vs effective data for the same 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), based on indicators available mostly from Turismo de Portugal – Travel BI.

Table 1 - Destination Profile of Alentejo Region

#	Indicator	Value
1	Is/Are there Tourism Satellite Account/s (TSA) in the destination country/ies, measuring the economic dimensions of tourism at national level?	☒YES Last time national TSA was conducted: 2020 (Fonte: INE[1], 2020) ☐ NO
2	Sector relevance: Contribution of (a) tourism and (b) other economic sectors to the national (and if available local) GDP (%) – latest figures	a) Direct contribution of tourism to the National GDP (2019): 8.7%. (TP, 2021). 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%). 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%).
3	Arrivals of inbound (non-resident) visitors for last three years – Thousands	Overnight[1]: 353.289 (2020p); 1.001.351 (2019); 967.541 (2018) 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: 1,486,068 (2020); 1,937.479 (2019); 1,708.404 (2018) 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: 753 (2019) Total rooms: 11,722 (2019) Total bed-places: 25,941 (2019)
6	Current top 5 primary source markets for the destination	Portugal, Spain, Germany, France, Brazil (2020p)
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?	☒YES Name of those of relevance: Turismo do Alentejo ERT, the destination's tourism board, is carrying out a sustainability certification process - Biosphere Certification. In 2020, 39 hotels and 119 restaurants are already certified and 46 rural tourism accommodation units joined the process.
9	Specify if there are any other initiatives/projects of relevance for the Observatory in the destination (and which)?	☒YES 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	☒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] This data was obtained in INE - Estatísticas do turismo: 2019.

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 (2019)[3]
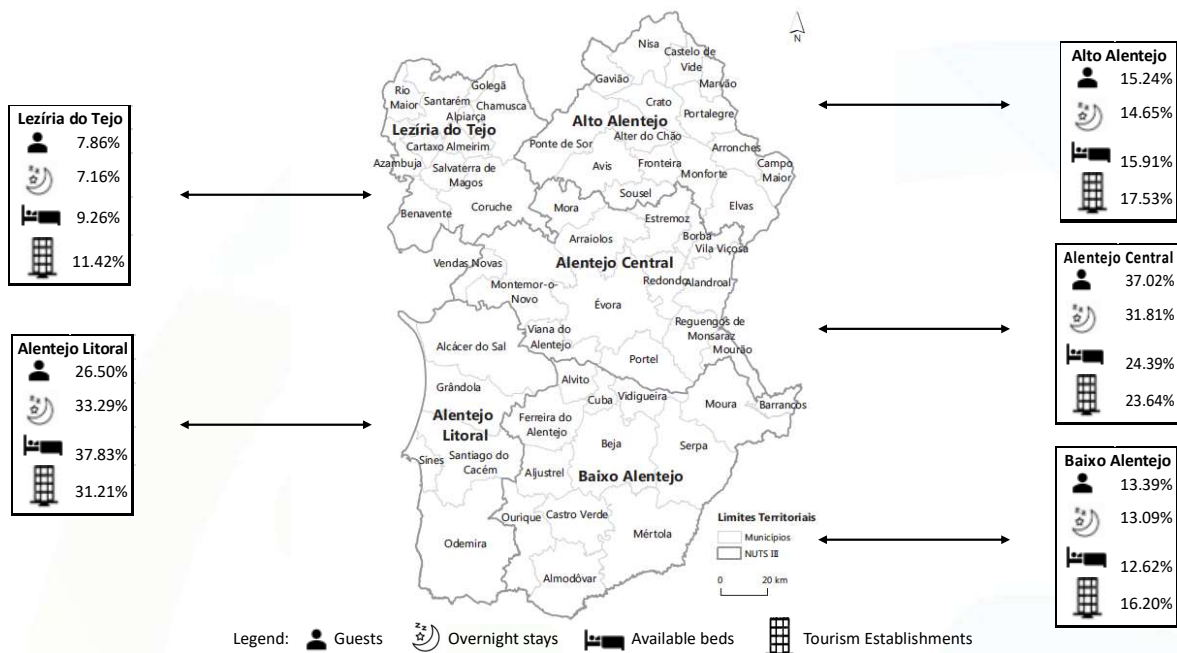
Source: INE (2020)

As illustrated in Figure 1, in 2019, Alentejo Central had the highest tourism demand in terms of guests concentrating with 37.02%. However, Alentejo Litoral concentrated the highest number of overnight stays with 33.29% in the Alentejo region. Alentejo Litoral was the region with the highest tourism accommodation capacity with 37.83% of available beds and 31.21% 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).

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[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.

As it can be observed comparing with the previous reports, the contribution of tourism to the national GDP grew from 8.1% (2017) to 8.7% (2019). This growth tendency encountered a turning point with the COVID-19 pandemic. Comparing the number of trips by domestic visitors, from 2018 to 2020, a decrease of 13% happened, while the arrivals of inbound (non-resident) visitors registered a decrease of 63% in this period. In terms of the top 5 primary source markets for the destination, Portugal is still (and was reinforced as) the leading market.

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 2.

Table 2 - Destination Economic Benefits

Sustainability Indicator	Year	Destination Economic Benefits		
Relative direct contribution of tourism to the destination's economy (% GDP)	2019	Portugal – 8.7% Alentejo – n.a.		
Average length of stay of tourists (nights)	2019		Portugal	Alentejo
		Average length of stay	2.4	1.7
		Residents	1.6	1.7
		Non-residents	3	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 (%)	2010/20	Portugal – -3.6% Alentejo – 4.6%		
Annual average growth of accommodation capacity (beds)	2014/19	Portugal – 5.3% Alentejo – 7.1%		

Source: Turismo de Portugal (2021); INE (2021)

In 2019, the average length of stay in the Alentejo region was 1.7 nights for internal tourism, both residents and non-residents. The NUTIII region with the highest average length of stay, in 2019, was Alentejo Litoral (2.3 nights) and the lowest was verified in Alentejo Central (1.6 nights) (see Table 1, Appendix 1).

From 2010 to 2020, overnight stays in the Alentejo region increased around 4.6% per year, while national overnight stays reduced more than 3% per year. These numbers reflect the very negative 2020 year, because before the COVID-19 the average growth of overnights stays was really interesting (see the previous report). Over the last 9 years the region maintained a level of approximately 3% of the overnight stays of the country. In the last year, 2020, the proportion of overnights in Alentejo grew to 7% of the total overnights in the country. We believe this tendency

was stimulated by the pandemics that transformed the countryside and less populated areas much more attractive destinations.

From 2014 to 2019, as a response to the growth in tourism demand, the accommodation capacity of the region grew 7.1%, in average, per year. In this period of time, the region maintained a level of approximately 6% of the accommodation capacity of the country. These data don't reflect the effect of the pandemics, since the last available year was 2019.

Table 3 - Employment

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

Source: Turismo de Portugal (2021)

According to Turismo de Portugal (TravelBI, 2020; Table 3), nearly 24% of tourism jobs in Alentejo were seasonal in 2017, which implies that 76% were stable all over the year. These data were the last available.

Table 4 - Tourism Seasonality

Sustainability Indicator	Year	Tourism Seasonality			
		Annual Bed Occupancy Rate		Annual Room Occupancy Rate	
		Portugal	Alentejo	Portugal	Alentejo
Occupancy rate in commercial accommodation per month and average for the year	2020	21.7%	24.2%	26.3%	31.6%
Seasonality Rate	2019	Portugal – 36.3% Alentejo – 39.9%			
% of hotels open year-round	2019	Portugal – 82.0% Alentejo – 80.2%			

Source: Turismo de Portugal (2021)

As reported by Turismo de Portugal (TravelBI, 2021), the region annual average for both types of occupancy rates (bed and room) is now is higher than the national ones. This change, again, was a consequence of the modification on the tourism demand during a pandemic period (Table 4).

The Alentejo region tourism seasonality rate is 39.9%, in 2019. Even though there were low seasons with occupancy rates around 20.0%, 80.2% of the region's hotels stay open during all the year of 2019. It is expected that the scenario will be very different in 2020.

3.2. Social Indicators

According to Turismo de Portugal (2021), in 2019 the tourist density registered in the Alentejo region was 2.07 overnight stays per km^2, per day, value much lower than the tourist density of Portugal (Table 5). Concerning the tourist intensity index, in 2019 the Alentejo region recorded 1.12 overnight stays per 1000 residents, per day, approximately the value registered in Portugal, and there are 37 available beds per 1000 residents in the Alentejo region, which is more than the national value (Table 5). These data were retrieved from the Travel BI (TP, 2021) website and the Observatory team noticed that some data regarding the last years were different from the data available in 2019 and 2020: the tourist intensity and density are now presented in daily format and the numbers on the available beds per 1000 residents, for 2018 (presented in the previous report), are now different from the ones presented in the same website on 2020. We assume these differences are a result of some improvements and changes in the website due to its novelty and need for some adjustments over time and due to changes in estimated *vs* effective data for the same year. The remaining results are pending an ongoing project of the observatory.

Table 5 - Local Satisfaction with Tourism

Sustainability Indicator	Year	Local Satisfaction
Tourist density (overnights/km^2/day)	2019	Portugal – 2.07 Alentejo – 0.25
Tourist intensity (overnights/1000 residents/day)	2019	Portugal – 1.86 Alentejo – 1.12
Available beds per 1000 residents	2019	Portugal – 34 Alentejo – 37
% of residents who are satisfied with tourism in the destination	44,8%	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	60,8%	These results are pending an ongoing project of the observatory

Source: Turismo de Portugal (2021)

3.3. Environmental Indicators

Considering the data on energy management and water management (Table 6), the latest report published by Turismo de Portugal, I.P. no longer presents some disaggregated data at the level of NUT II. This fact does not allow to analyse the performance of the destination under analysis for almost all of the indicators in Table 6 and, therefore, does not allow to continue monitoring based on previous reports.

Table 6 - Energy Management and Water Management

Sustainability Indicator	Year	Energy Management	Water Management	
% of lodging establishments with objectives to limit energy consumption	2019	Portugal – 66% Alentejo – 68%		
			Portugal	Alentejo
Top 5 energy saving measures	2019	Class A appliances or superior	78%	na
		Thermal and acoustic insulation of windows, waterproof frames	82%	na
		Energy-saving light bulbs	97%	na
		Air conditioning Acclimatization system with intensity adjustable by the customer	92%	na
		Lighting system activated by card	80%	na
% of tourism enterprises taking actions to reduce water consumption	2019	Portugal – 70% Alentejo – 57%		
% of tourism enterprises with objectives to reduce water consumption	2019	Portugal – na Alentejo – na		
% of treated and potable water in destination	2019	Portugal – na Alentejo – na		
			Portugal	Alentejo
Top 5 measures taken to reduce water consumption	2019	Low consumption flushing system	79%	na
		Guests invited to communicate any loss of water	87%	na
		Change of towels and sheets requested by guest or according to the minimum legal required	95%	na
		Water flow reducers in taps and showers	82%	na
		Timers in taps	43%	na

Source: Turismo de Portugal (2020c)

Different types of waste are separated by 45% of the tourism enterprises in the Alentejo region. This result is slightly lower than the one registered for the whole country (60%) (Table 7).

Table 7 - 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	2019	Portugal – 60% Alentejo – 45%	

Source: Turismo de Portugal (2020c)

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 8).

Table 8 - Other Indicators

Sustainability Indicator	Year		Portugal	Alentejo
Resort areas that are certified for their sustainability efforts	2019	Portugal – 378 Alentejo – 39		
% of water in resort areas that is considered good / excellent quality when compared to the rest of the water in the destination	2019	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	2019	Portugal – na Alentejo – na		
Environmental spending per inhabitant	2019	Portugal – na Alentejo – na		
% of tourism enterprises / establishments in the destination using voluntary certification / labelling for environmental / quality / sustainability factors and/or Corporate Social Responsibility	2019	Portugal – 47% Alentejo – 29%		
% of tourism establishments available for guest with special needs	2019	Portugal – na Alentejo – na		

Source: Turismo de Portugal$_c$ (2020)

4. Final Reflections

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

1) The compilation of data for producing the current report (note that the current report presents the most recent available data on each topic, most of which are provisional data).
2) The ASTO website (http://www.asto.pt) and social network pages were accomplished.
3) Survey regarding the Local satisfaction with tourism: a total of 2620 surveys in 34 municipalities were applied (with a sample error of 1.91%) in 2020 and the main results will be available soon in the ASTO website.
4) Constitution of the Local Working Group (LWG) (Table 9): the strategic tourist agents were identified and the contacts and invitations are in progress (1st meeting is already scheduled to April). The WLG includes national sector associations, institutions with internationally recognized tourism projects at the regional level, public institutions at the regional and national levels (Table 9). This task was developed in partnership with the ERTA. In the near future, it is intended to add more agents to the LWG (in Portugal called the Regional Action Group)

Table 9 – Members of the Local Working Group (LWG) of ASTO

Members
• AHP – Associação da Hotelaria de Portugal (https://www.hoteis-portugal.pt/)
• AHRESP – Associação da Hotelaria, Restauração e Similares de Portugal (https://ahresp.com/)
• APAVT – Associação Portuguesa das Agências de Viagens e Turismo (http://www.apavtnet.pt/en)
• APECATE – Associação Portuguesa de Empresas de Congressos, Animação Turística e Eventos (https://apecate.pt/)
• ARPTA – Agência Regional de Promoção Turística do Alentejo (https://www.visitalentejo.pt/en/alentejo/about-us/arpta/)
• Associação Dark Sky (https://darkskyalqueva.com/en/dark-sky-team/#)
• Associação Heranças do Alentejo (https://www.herancasdoalentejo.net/en)
• Associação Rota Vicentina (https://rotavicentina.com/en/about-the-association/)
• CCDRA – Comissão de Coordenação e Desenvolvimento Regional do Alentejo (https://www.ccdr-a.gov.pt/)
• DRCALEN – Direção Regional de Cultura do Alentejo (http://www.cultura-alentejo.pt/)
• ICNF – Instituto da Conservação da Natureza e das Florestas (https://www.icnf.pt/)
• IEFP – Instituto de Emprego e Formação Profissional (https://www.iefp.pt/)
• INE – Instituto Nacional de Estatística – Delegação do Alentejo (https://ine.pt/xportal/xmain?xpid=INE&xpgid=ine_main)

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

1) Participation at the 2020 Global INSTO Annual Meeting (webinar session).
2) Participation in a scientific conference: organization of the thematic panel "Tourism observatories: challenges and opportunities for more sustainable tourism" during the INVTUR 2021 Conference.

As mentioned in the 2nd Annual Report, an 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. In this context, during the beginning of this year ASTO started to define the most adequate technologic solution to knowledge management regarding indicators for the thematic areas (named **Digital PISTA**) and is starting to get some results. However, the objectives are 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.

The year of 2020 and first months of 2021 were marked by the COVID-19 pandemics. The work developed by the ASTO team encountered several constraints, due to the lack of human resources fully and only committed with the ASTO. We hope that during 2021 and the effective development of PISTA project, the tasks that are ongoing will be boosted and finished.

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Appendix

Appendix 1 | Destination Economic Benefits

	Regional Average Length of Stay (nights) 2019
Portugal	2.6
Alentejo	1.8
Alentejo Litoral	2.3
Baixo Alentejo	1.8
Lezíria do Tejo	1.7
Alto Alentejo	1.7
Alentejo Central	1.6

Source: INE$_{BD}$ (2021)