

InfoGest 2021

The atypical character of the year 2020, motivated by the COVID-19 pandemic, extends unfortunately to 2021. Given that tourism activity practically came to a halt in April 2020, it makes sense to consider not only the comparison to the previous year, but also to 2019. This will allow for a clearer identification of any recovery signs in the tourism performance indicators of the Lisbon Region, whenever they may occur.

Since there was still some normality in the first trimester of 2020, the variations to 2021 in occupancy/room, average daily rate (ADR) and revenue per available room (RevPAR) are quite significant, even more so when comparing to 2019. Regarding the cumulated data up to March 2021, the Lisbon Region had the following performance:

LISBON REGION		2021	2020	var. 20/21	2019	var. 19/21
occupancy/room (January to March 2021)	3 ***	10,2%	54,9%	-81,4%	72,1%	-85,8%
	4 ****	10,7%	47,9%	-77,6%	63,7%	-83,1%
	5 *****	5,0%	40,1%	-87,4%	56,3%	-91,0%
	global	8,9%	47,2%	-81,1%	63,3%	-85,9%
ADR (January to March 2021)	3 ***	48,91 €	62,07 €	-21,2%	61,37 €	-20,3%
	4 ****	60,76 €	73,30 €	-17,1%	75,42 €	-19,4%
	5 *****	130,56 €	148,04 €	-11,8%	148,75 €	-12,2%
	global	69,45 €	87,72 €	-20,8%	89,67 €	-22,5%
RevPAR (January to March 2021)	3 ***	5,00 €	34,10 €	-85,3%	44,22 €	-88,7%
	4 ****	6,52 €	35,10 €	-81,4%	48,03 €	-86,4%
	5 *****	6,58 €	59,40 €	-88,9%	83,74 €	-92,1%
	global	6,19 €	41,40 €	-85,0%	56,75 €	-89,1%

In the first three months of the year, 56,2% of the 162 hotel units that constitute the sample for the InfoGest monthly analysis for the Lisbon Region, on average, had suspended their activity. With a gradual improvement from that point on, we reached June with only 29% of those establishments under those same circumstances.

In what concerns the monthly performance in April, May and June, all indicators in all accommodation categories showed a strong increase from 2020. However, they are still very far from the figures of 2019, namely in terms of occupancy and RevPAR. Globally, for the first semester of 2021, there was the following evolution:

LISBON REGION		2021	2020	var. 20/21	2019	var. 19/21
occupancy/room (January to June 2021)	3 ***	18,3%	42,7%	-57,1%	81,8%	-77,6%
	4 ****	19,1%	40,1%	-52,4%	75,5%	-74,7%
	5 *****	12,5%	35,8%	-65,2%	66,9%	-81,4%
	global	16,9%	39,6%	-57,4%	74,4%	-77,3%
ADR (January to June 2021)	3 ***	56,68 €	61,71 €	-8,1%	75,97 €	-25,4%
	4 ****	69,21 €	72,87 €	-5,0%	91,05 €	-24,0%
	5 *****	167,89 €	147,55 €	13,8%	176,30 €	-4,8%
	global	88,67 €	86,69 €	2,3%	108,12 €	-18,0%
RevPAR (January to June 2021)	3 ***	10,38 €	26,33 €	-60,6%	62,11 €	-83,3%
	4 ****	13,20 €	29,20 €	-54,8%	68,73 €	-80,8%
	5 *****	20,92 €	52,81 €	-60,4%	117,96 €	-82,3%
	global	14,97 €	34,32 €	-56,4%	80,45 €	-81,4%