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INSTO

World Tourism Organization
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of Sustainable Tourism
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e Antropologia da Alentejo

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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 (NUT II). 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 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](#)). In 2022 the Polytechnic Institute of Beja expressed its interest in joining ASTO.

The purpose of this 4th Annual Progress Report is to provide an overview of the monitoring activities for each issue area, the operations, performance and lessons identified by ASTO during its fourth 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 for the year 2021 (where data for 2021 is not available, the most recent data available will be provided). Then, an overall description of the current monitoring process is presented, divided into 11 mandatory issue areas: Destination Economic Benefits, Employment, Tourism Seasonality, Local Satisfaction, Energy Management, Water Management, Waste Water (Sewage) Management, Solid Waste Management, Accessibility, Governance and Climate Change. Also, the General Destination Performance Criteria area is being considered for monitoring. The available tourism-related data is described to enable stakeholders to evaluate the sector's global performance, with data so far available. The last section intends to identify ongoing activities which are currently being implemented and also forthcoming activities and challenges that may be implemented during 2022 and next year.

As this report was produced in the second semester of 2022, it is possible to present consolidated annual data for 2021 (unlike the last report, which, having been produced in March 2020, only a preliminary data for the 1st trimester of 2019 could be presented).

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 from INE - Statistic Portugal and the Travel BI platform of Turismo de Portugal.

Table 1 - Destination Profile of the Alentejo Region

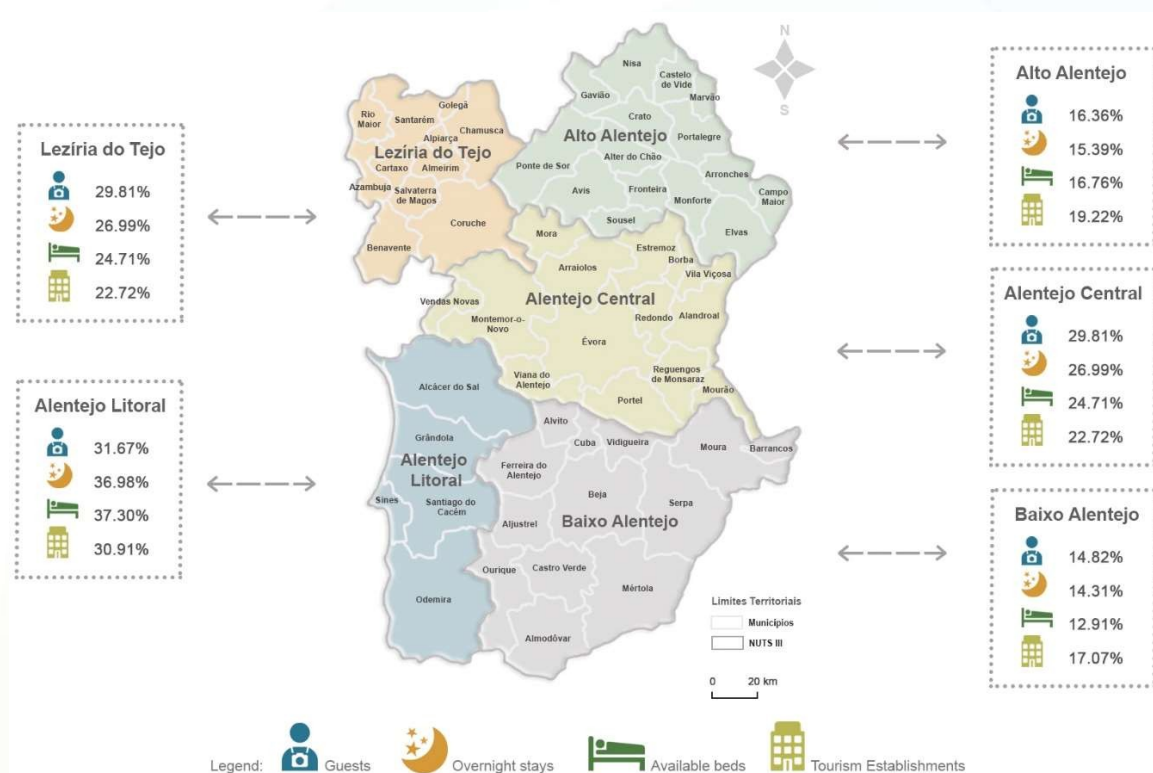
1	Is/Are there Tourism Satellite Account/s (TSA) in the destination country/ies, measuring the economic dimensions of tourism at national level?	☒ YES Last time national TSA was conducted: 2021 (Source: INE ₁ , 2022)	☐ NO																																				
2	Sector relevance: Contribution of (a) tourism and (b) other economic sectors to the national (and if available local) GDP or GVA (%) – latest figures N – National R – Regional (Alentejo NUT II)	<table><tr><td>a) Direct and indirect contribution of tourism to the National GDP (2021): 8.0%. (Source: INE₂, 2022)</td><td></td><td></td></tr><tr><td>b) National and Regional % GVA (2019) (Source: INE, 2021)</td><td>N</td><td>R</td></tr><tr><td>Wholesale and retail trade, repair of motor vehicles and motorcycles, transportation and storages, accommodation and food service activities</td><td>24.3</td><td>22.3</td></tr><tr><td>Public administration and defence, compulsory social security, education, human health and social work activities</td><td>19.1</td><td>21.0</td></tr><tr><td>Mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply, water abstraction, purification and supply, sewerage, waste management and remediation activities</td><td>17.4</td><td>19.8</td></tr><tr><td>Real estate activities</td><td>12.5</td><td>12.0</td></tr><tr><td>Agriculture, livestock production, hunting, forestry and fishing</td><td>2.4</td><td>11.4</td></tr><tr><td>Professional, scientific technical and similar activities, administrative and support service activities</td><td>8.3</td><td>4.0</td></tr><tr><td>Construction</td><td>4.4</td><td>3.9</td></tr><tr><td>Financial and insurance activities</td><td>4.9</td><td>2.3</td></tr><tr><td>Arts, entertainment and recreation, repair of household goods and other services</td><td>2.9</td><td>2.3</td></tr><tr><td>Information and communication activities</td><td>3.9</td><td>0.9</td></tr></table>	a) Direct and indirect contribution of tourism to the National GDP (2021): 8.0%. (Source: INE ₂ , 2022)			b) National and Regional % GVA (2019) (Source: INE, 2021)	N	R	Wholesale and retail trade, repair of motor vehicles and motorcycles, transportation and storages, accommodation and food service activities	24.3	22.3	Public administration and defence, compulsory social security, education, human health and social work activities	19.1	21.0	Mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply, water abstraction, purification and supply, sewerage, waste management and remediation activities	17.4	19.8	Real estate activities	12.5	12.0	Agriculture, livestock production, hunting, forestry and fishing	2.4	11.4	Professional, scientific technical and similar activities, administrative and support service activities	8.3	4.0	Construction	4.4	3.9	Financial and insurance activities	4.9	2.3	Arts, entertainment and recreation, repair of household goods and other services	2.9	2.3	Information and communication activities	3.9	0.9	
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Arts, entertainment and recreation, repair of household goods and other services	2.9	2.3																																					
Information and communication activities	3.9	0.9																																					
3	Arrivals of inbound (non-resident) visitors for last three years (Thousands)	Overnight ¹ : 465,700 (2021); 340,817 (2020); 1 001,4 (2019) 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)	Peak month (August): 17.6% (2021); 17.7% (2020) Peak quarter (Aug./Sep./Oct.): 48.8% (2021) Peak quarter (Jul./Aug./Sep.): 42.5% (2020)																																					
4	Trips of domestic visitors for the last three years (Thousands)	Overnight ¹ : 1 814,4 (2021); 1 488,4 (2020); 1 937,5 (2019) 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)	Peak month (August): 20.9% (2021); 23.3% (2020) Peak quarter (Jul./Aug./Sep.): 49.2% (2021) Peak quarter (Jul./Aug./Sep.): 53.3% (2020)																																					
5	Tourism industries: accommodation for visitors in hotel and similar establishments (Units)	Number of establishments: 744 (2021); 671 (2020) Total rooms: 11 698 (2021); 10 855 (2020) Total bed-places: 25 347 (2021); 23 718 (2020)																																					
6	Current top 5 primary source markets for the destination	Portugal, Spain, France, Germany, United Kingdom (2021) Portugal, Spain, Germany, France, Brazil (2020)																																					
7	Please describe the destination's experience with other monitoring initiatives/systems	In early 2022, ASTO (through the PISTA project) implemented the development of a system of indicators associated with the monitoring of visitors to Tourist Offices (individual and group).																																					
8	Are there strategies in place for sustainable development of the destination?	☒ YES Name of those of relevance: Since 2016, the destination's regional tourism board is carrying out a sustainability certification process for the entire Tourist Value Chain and also establishments - Biosphere Certification . 13 establ. in 2018; 26 establ. in 2019; 26 establ. in 2020/21/22; and 17 establ. in process in July 2022																																					
9	Specify if there are any other initiatives/projects of relevance for the Observatory in the destination (and which)?	☒ YES Since the presentation of the last report, no new relevant initiatives have been identified.																																					
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).

Comparing the number of overnights stays between 2018 to 2021, there is an increase of 6.2% as regards domestic visitors, while the arrivals of inbound (non-resident) registered a decrease of 51.9% (INE, 2019 and 2022). In terms of the top 5 primary source markets for the destination in 2021, Portugal continues to be the leading market, followed by Spain (INE, 2022).

ASTO monitoring area of Alentejo (NUT II) maintains the same administrative regions. It still integrates 5 NUT's 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 Establishments² (2021)



As illustrated in Figure 1, the Alentejo Litoral region stood out in the year 2021 for having had the highest tourism demand in terms of guests, with 31.67%, and concentrated the highest number of overnight stays, with 36.98% in the Alentejo region. The Alentejo Litoral was also the region with the highest tourism accommodation capacity, with 37.30% of available beds and 30.91% of tourism establishments. Furthermore, Lezíria do Tejo has the lowest tourism demand and accommodation capacity.

² Tourist accommodation establishments considered: Hotel establishments, Local accommodation [with 10 or more beds] and Rural tourism and Housing tourism (excludes campsites).

3. Process of Monitoring Issues

To accomplish its objective of monitoring sustainability in different areas, ASTO team searched for data available at the official entities data bases and found several indicators with different level of geographic desegregation and methodological approach. Also, primary data collected by ASTO team is presented. 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 and indirect contribution of tourism to the destination's economy (% GDP)	2021	Portugal: 8.0% Alentejo: n.a.	
Average length of stay of tourists (nights)	2020	Average length of stay	Portugal: 2.5 Alentejo: 2.1
		Residents	2.1 2.0
		Non-residents	3.1 2.2
	2021	Average length of stay	2.6 2.0
		Residents	2.2 2.0
		Non-residents	3.2 2.2
% of locally produced food, drinks, goods and services sourced by the destination's tourism enterprises	2021	--	
Average annual growth of overnight stays (%)	2020/21	Portugal: 44.7% Alentejo: 24.6%	
Average annual growth of accommodation capacity (beds)	2020/21	Portugal: 17.4% Alentejo: 6.9%	

Source: Turismo de Portugal (2022); INE (2021 e 2022)

In 2021, the average length of stay in the total of the Alentejo region was 2 nights (2.0 for residents and 2.2 for non-residents). The NUTIII region with the highest average length of stay, in 2021, was Alentejo Litoral (2.4 nights) and the lowest was verified in Alentejo Central and Lezíria do Tejo (1.8 nights) (see Table 1, Appendix 1).

From 2020 to 2021, overnight stays in the Alentejo region increased 24.6%, while national overnight increased 44.7%. In 2020, the share of overnight stays in the Alentejo compared to the total national was 7.1, while in 2021 it was 6.1. (slightly lower than in the previous year).

From 2020 to 2021, as a response to the growth in tourism demand, the accommodation capacity of the region grew 6.9%. In the last year, the region maintained a level of approximately 6% of the accommodation capacity of the country.

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 the latest available data (2017) from 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.

Table 4 - Tourism Seasonality

Sustainability Indicator	Year	Tourism Seasonality
Occupancy rate in commercial accommodation per month and average for the year	2021	Portugal: 28.6% Alentejo: 30.0%
		Portugal: 35.1% Alentejo: 39.5%
Seasonality Rate	2020	Portugal: 43.6% Alentejo: 51.3%
	2021	Portugal: 47.2% Alentejo: 48.1%
% of hotels open year-round	2020	Portugal: 71.0% Alentejo: 73.3%
	2021	Portugal: 74.8% Alentejo: 77.3%

Source: Turismo de Portugal (2022)

As reported by Turismo de Portugal (TravelBI, 2022), the Alentejo region annual average for both types of occupancy rates (bed and room) is higher than the national annual average in 2021 (as it was in 2020), a trend explained as being a consequence of the transformation of tourism demand due to the COVID-19 pandemic (Table 4).

The Alentejo region tourism seasonality rate was 51.3% in 2020 decreasing to 48.1% in 2021.

Some recovery of the tourist activity may be observed, with an increment of hotels that stayed open all year round from 73.3% in 2020 to 77.3% in 2021.

3.2. Social Indicators

According to the most recent data made available by Turismo de Portugal (2022), in 2020 the tourist density registered in the Alentejo region was 0.16 overnight stays per km², per day, value much lower than the tourist density of Portugal (Table 5).

Concerning the tourist intensity index, in 2020 the Alentejo region recorded 0.72 overnight stays per 100 residents, per day, approximately the value registered in Portugal.

An increase in available beds per 1000 residents in the Alentejo region was noted, rising from 33.9 in 2020 (a higher value than in Portugal) to 35.9 in 2021.

Table 5 - Local Satisfaction with Tourism

Sustainability Indicator	Year	Local Satisfaction
Tourist density (overnights/km ² /day) ³	2020	Portugal: 0.76 Alentejo: 0.16
Tourist intensity (overnights/100 residents/day) ²	2020	Portugal: 0.69 Alentejo: 0.72
Available beds per 1000 residents ²	2020	Portugal: 33.5 Alentejo: 33.9
	2021	Portugal: 39.1 Alentejo: 35.9
% of residents who are satisfied with tourism in the destination ⁴	2019/20	Portugal: na Alentejo: 44.8%
	2021	Portugal: na Alentejo: 49.8%
% of residents who are satisfied with the impacts of tourism on the destination's identity ³	2019/20	Portugal: na Alentejo: 60.8%
	2021	Portugal: na Alentejo: 66.3%

Source: ASTO (2022), Turismo de Portugal (2022), INE (2022)

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.

³ Source: Turismo de Portugal (2022), INE (2022)

⁴ These results are from ASTO Observatory own survey since 2019

Table 6 - Energy Management and Water Management

Sustainability Indicator	Year	Energy Management		Water Management	
		Portugal		Alentejo	
% of lodging establishments with objectives to limit energy consumption	2019	Portugal: 66%		Alentejo: 68%	
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	
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 (2021c)

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

Source: Turismo de Portugal (2021c)

Sustainability Indicator	Year	Waste Water (Sewage) Management		Solid Waste Management	
		Portugal		Alentejo	
% of tourism enterprises separating different types of waste	2019	Portugal: 60%		Alentejo: 45%	

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).

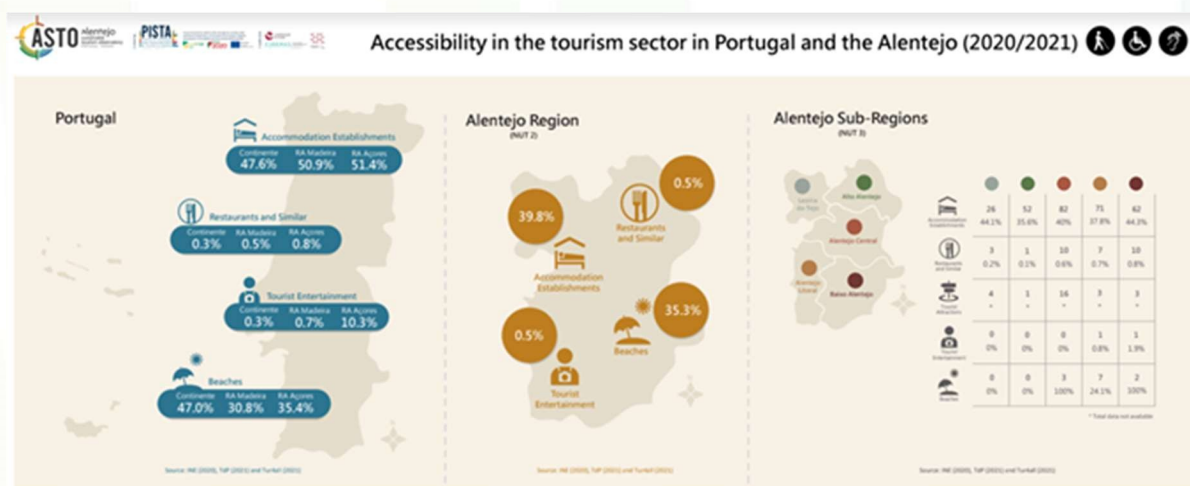
Table 8 - Other Indicators

Sustainability Indicator	Year	
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	2020	Portugal 96.1% Alentejo 100.0%
		Nº of resort areas with water considered good 35 1
		Nº of resort areas with water considered excellent 561 34
% of tourism enterprises that provide training / information on sustainable practices to their collaborators	2019	Portugal – na Alentejo – na
Environmental spending per 1000 inhabitants	2020	Portugal: 70.000,0€ Alentejo: 82.000,0€
% of tourism enterprises / establishments in the destination using		
voluntary certification / labelling for environmental / quality / sustainability factors and/or Corporate Social Responsibility ⁵	2021	Portugal: 6.48% (a total of 333 enterprises) Alentejo: 5.42% (a total of 42 enterprises)
% of tourism establishments available for guest with special needs	2020	Portugal: 2.9% Alentejo: 7.0%

Source: Turismo de Portugal, ^a(2022), RNT (2022)

The first compilation of the available indicators regarding accessibility in the tourism sector in the Alentejo region was developed in 2020/21 (Figure 2).

Figure 2 - Accessibility in the tourism sector in Portugal and the Alentejo (2020/21)



⁵ Source: RNT, 2022 (July 2022)

4. Final Reflections

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

- 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).
- The ASTO website (<http://www.asto.pt>) and social network pages were updated.
- Part of the results of the 1st survey regarding the Residents Local Satisfaction with tourism, conducted in 2020, were presented in some webinars and scientific conferences.
- A second survey has been conducted during 2021, with a smaller convenience sample (n=279), adding information regarding residents' perceptions on the COVID-19 impacts. A third survey will be launched during the last trimester of 2022, permanently available in the platform PISTA Digital, that will support the ASTO monitoring system.
- Planning and implementation of the system to collect primary data on individual and group Tourist Offices' visitors' profile of the Alentejo region, in close partnership with the municipal councils. The pilot phase is expected to be completed at the end of 2022.
- Definition and operationalization of the survey regarding the visitor profile of Alentejo region NUT II and continuation of the application process of the questionnaire referring to the Visitor Profile of the Historic Centre of Évora / UNESCO World Heritage.
- Regarding the environmental indicators, a partnership with Biosphere (<https://www.biospheretourism.com/en/delegation/Portugal/4>) was made in order to implement a pilot test with certified companies.
- After constituting the ASTO's Local Working Group (LWG), several individual meetings with the strategic tourist agents (at national, regional and local level) occurred since the last semester of 2021 to collect available secondary information.
- In the context of the PISTA project (see the previous Annual Report), the ASTO team started to implement the technological solution to knowledge management regarding indicators for the thematic areas, in a tool named PISTA Digital.
- The PISTA website (<https://pista.hpc.uevora.pt/en>) has been serving as an interface to develop the technological system for managing and sharing information on the indicators identified by ASTO. 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 main goals.
- Changes in progress within the development of indicators in the PISTA Digital tool (supporting ASTO) will be reflected in the annual report for next year (2023).
- Further challenges and reflections on progress:
 - i. Connect agents from the entire regional tourism value chain and keep them regularly involved in the ASTO.
 - ii. Establish relationship with other observatories or structures / projects in the area of science and knowledge to create synergies.
 - iii. Cooperation with other entities that generate data of interest to tourism agents, at international, national, regional and local level.
 - iv. Streamline the Regional Action Group regularly.
 - v. Identify funding/support opportunities.
 - vi. Plan the future of the data, information and knowledge management cycle with regard to partnership between ASTO and the High Performance Computing (HPC) Chair.

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Appendix

Appendix 1 | Destination Economic Benefits (regional average of stay, 2021)

	Regional Average Length of Stay (nights) 2021
Portugal	2.6
Alentejo	2.0
Alentejo Litoral	2.4
Baixo Alentejo	2.0
Alto Alentejo	1.9
Lezíria do Tejo	1.8
Alentejo Central	1.8

Source: INE_{DB} (2022)