



Portuguese Hospitality Atlas 2014

New players in the game

National ranking

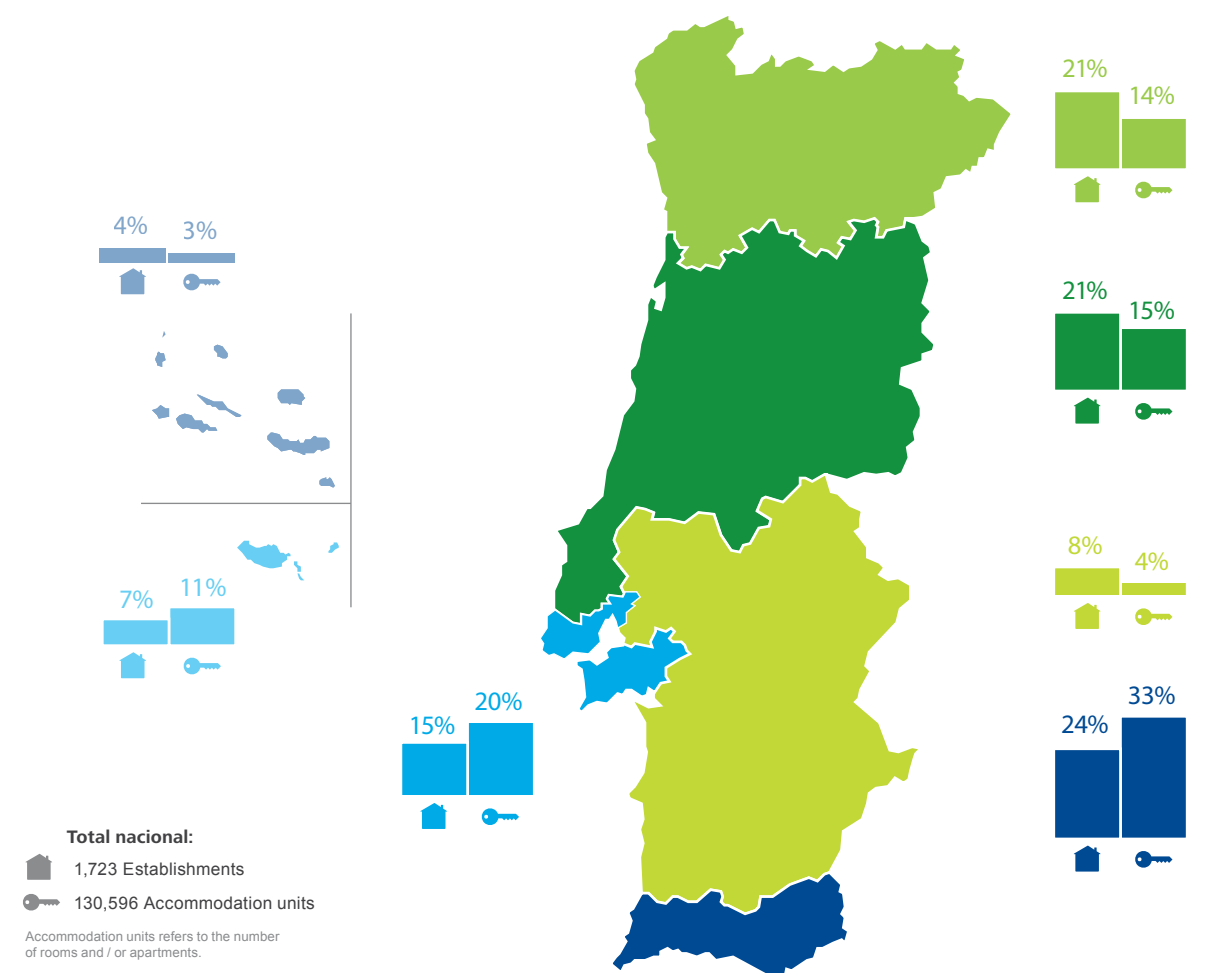
Ranking of Hotel groups / Management entities in Portugal (number of accommodation units)

Ranking	Hotel group / Management entity	Establishments	Lodging Capacity Accommodation Units ¹	Beds	International Presence				
Current	2013	Nr.	% of total	Nr.	% of total	Nr.	% of total		
1	1	Pestana Hotels & Resorts / Pousadas de Portugal ²	59	3,4%	6.475	5,0%	13.253	4,6%	✓
2	2	Vila Galé Hotéis	18	1,0%	3.884	3,0%	7.866	2,7%	✓
3	3	Accor Hotels	30	1,7%	3.153	2,4%	6.361	2,2%	✓
4	4	Tivoli Hotels & Resorts	12	0,7%	2.471	1,9%	5.050	1,8%	✓
5	-	ECS Capital	18	1,0%	2.357	1,8%	5.775	2,0%	✗
6	7	SANA Hotels	13	0,8%	2.088	1,6%	4.099	1,4%	✓
7	5	VIP Hotels	12	0,7%	2.064	1,6%	4.251	1,5%	✓
8	6	Hoti Hotéis/ Meliá Hotels & Resorts	14	0,8%	1.899	1,5%	3.785	1,3%	✗
9	8	Dom Pedro Hotels	7	0,4%	1.399	1,1%	2.915	1,0%	✓
10	-	Explorer Investments - Discovery Portugal Real Estate Fund	10	0,6%	1.335	1,0%	3.163	1,1%	✗
11	9	Continental Hotels	11	0,6%	1.294	1,0%	2.518	0,9%	✓
12	12	Hotéis Real	8	0,5%	1.231	0,9%	2.561	0,9%	✗
13	14	HF Hotéis Félix	7	0,4%	1.210	0,9%	2.323	0,8%	✗
14	11	Inatel Turismo	16	0,9%	1.210	0,9%	2.420	0,8%	✗
15	15	Riu Hotels & Resorts	3	0,2%	1.172	0,9%	2.389	0,8%	✓
16	13	Marriott	5	0,3%	1.150	0,9%	2.248	0,8%	✓
17	16	Porto Bay Hotels & Resorts	7	0,4%	1.121	0,9%	2.265	0,8%	✓
18	10	Starwood Hotels & Resorts	5	0,3%	1.096	0,8%	2.530	0,9%	✓
19	19	Turim Hotéis	11	0,6%	1.065	0,8%	2.628	0,9%	✗
20	-	Petchey Leisure	4	0,2%	1.000	0,8%	3.246	1,1%	✓
Sub-total		270	15,7%	38.674	29,6%	81.646	28,5%		
Other Hotel chains		431	25,0%	43.757	33,5%	95.458	33,4%		
Independent		1.022	59,3%	48.165	36,9%	108.983	38,1%		
Total		1.723	100%	130.596	100%	286.087	100%		

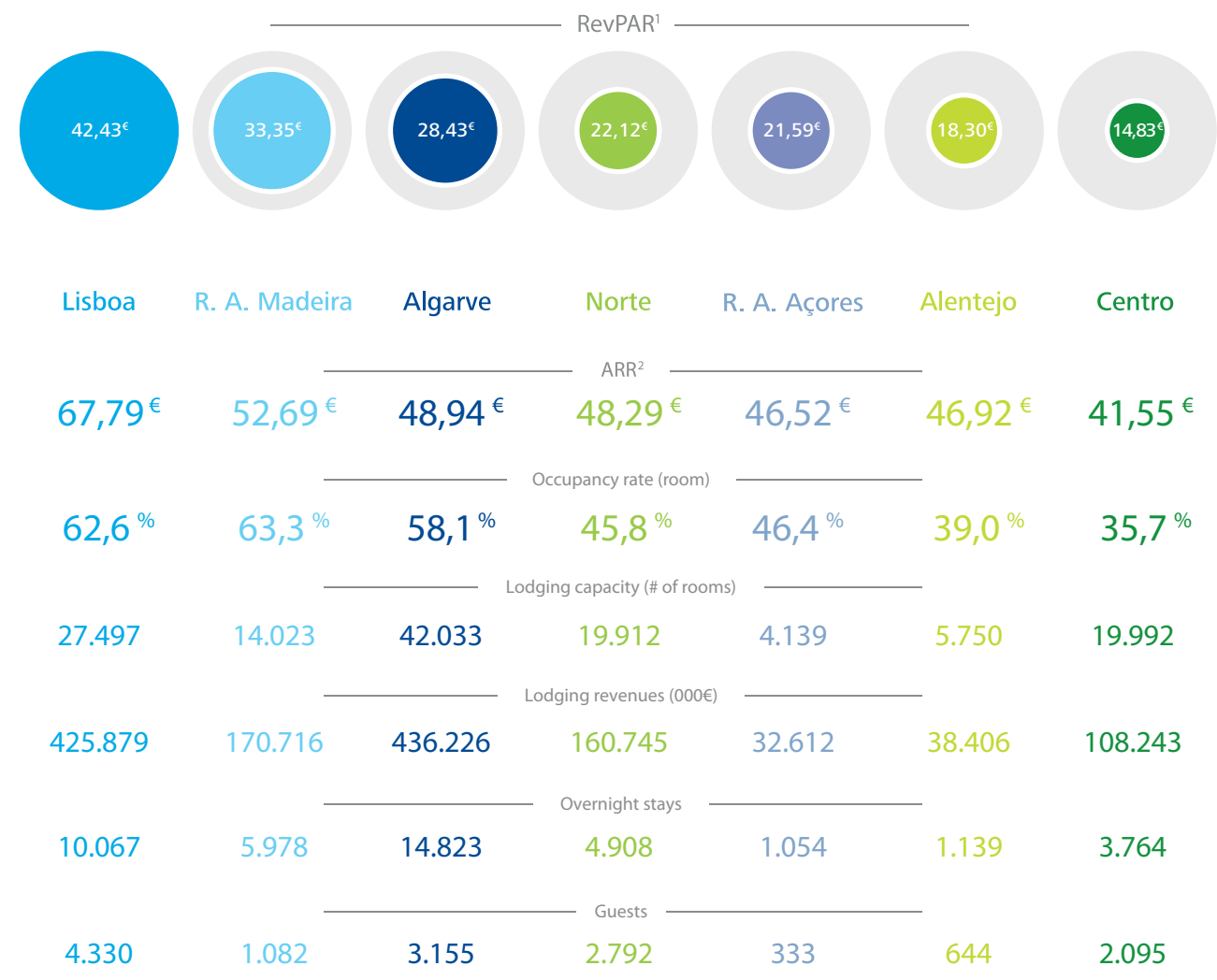
¹ Accommodation units refers to the number of rooms and / or apartments.
² Pousadas de Portugal includes only the lodging houses which are under the management of Pestana Hotels & Resorts Group.

Regional analysis

Breakdown by NUTS II

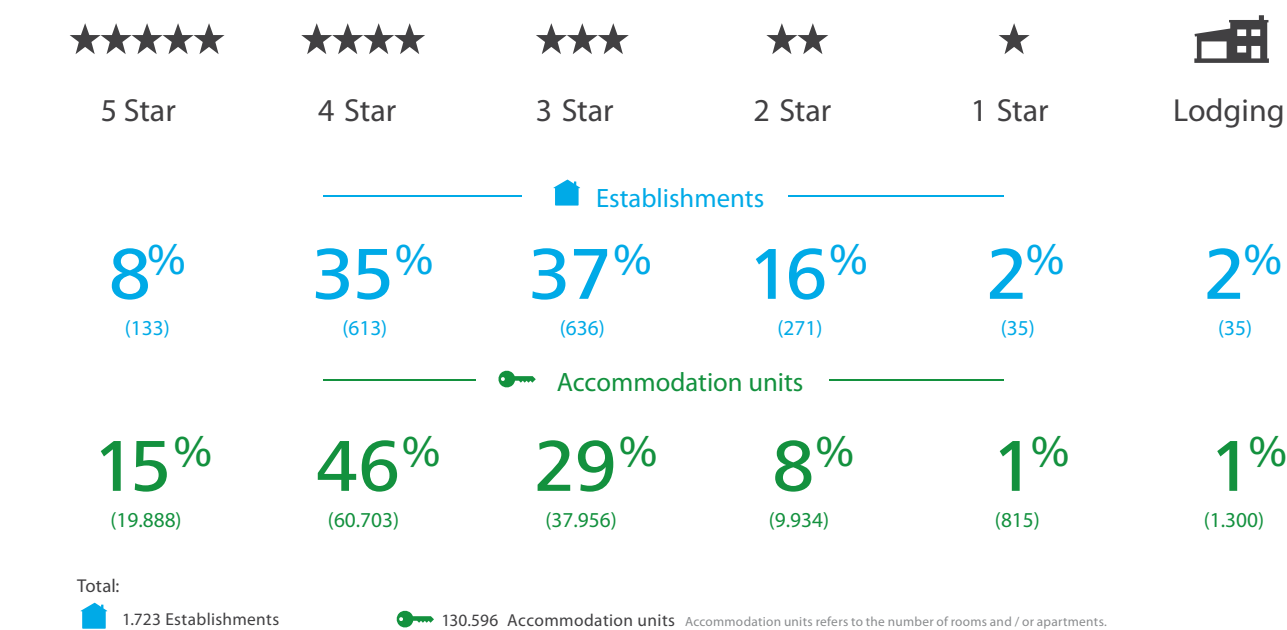


Operational indicators by NUTS II

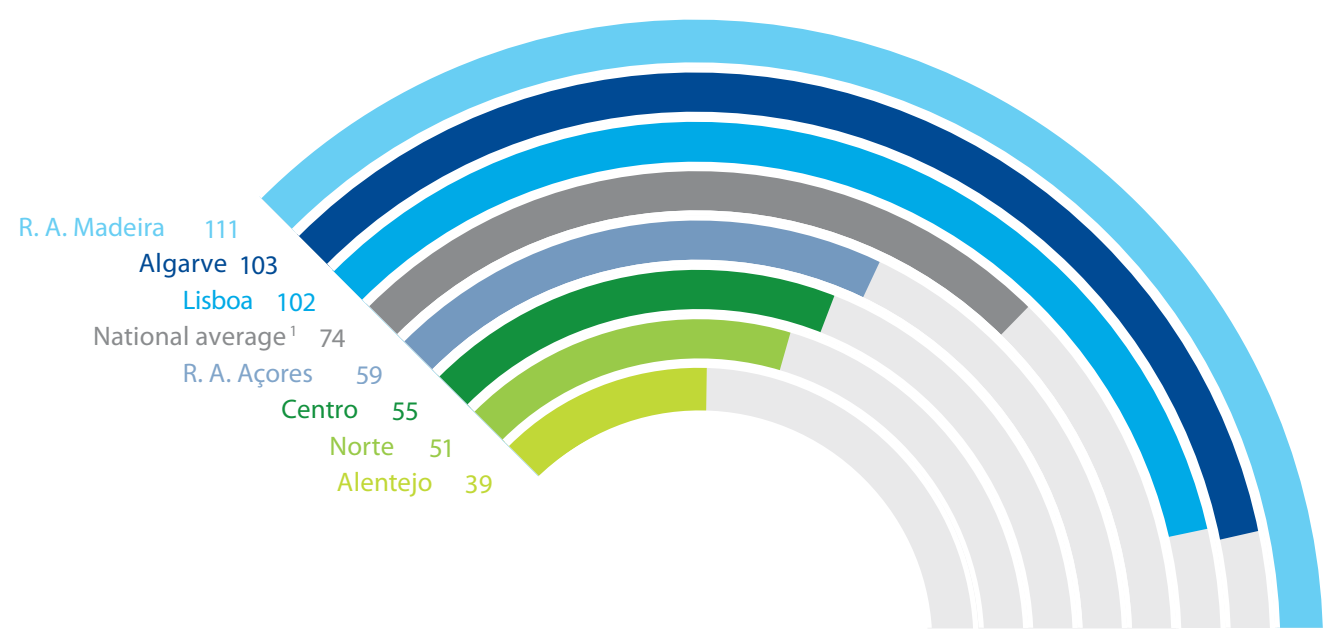


Source: TP - Turismo de Portugal (December 2013 data); Analysis: Deloitte.
¹ RevPAR: Revenue per Available Room = Lodging revenues / (# rooms x 365).
² ARR (Average Room Rate) = Lodging revenues / (# rooms x Occupancy rate x 365).
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Breakdown by classification

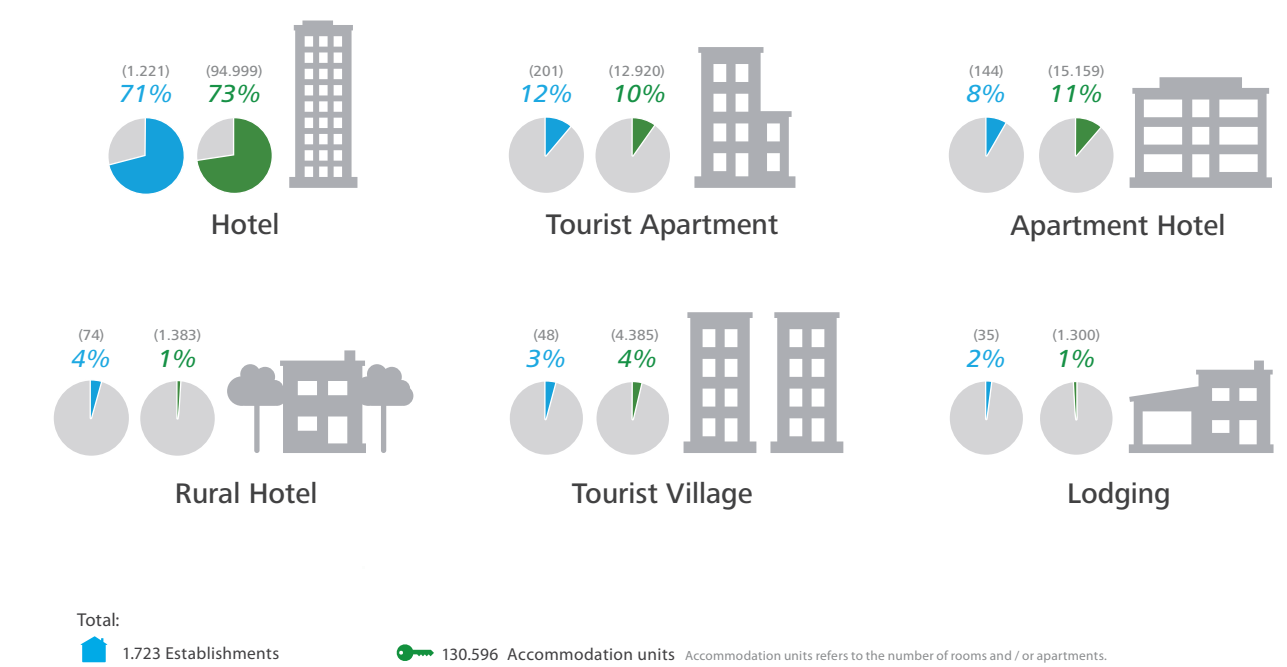


Average size of the establishments (number of accommodation units)

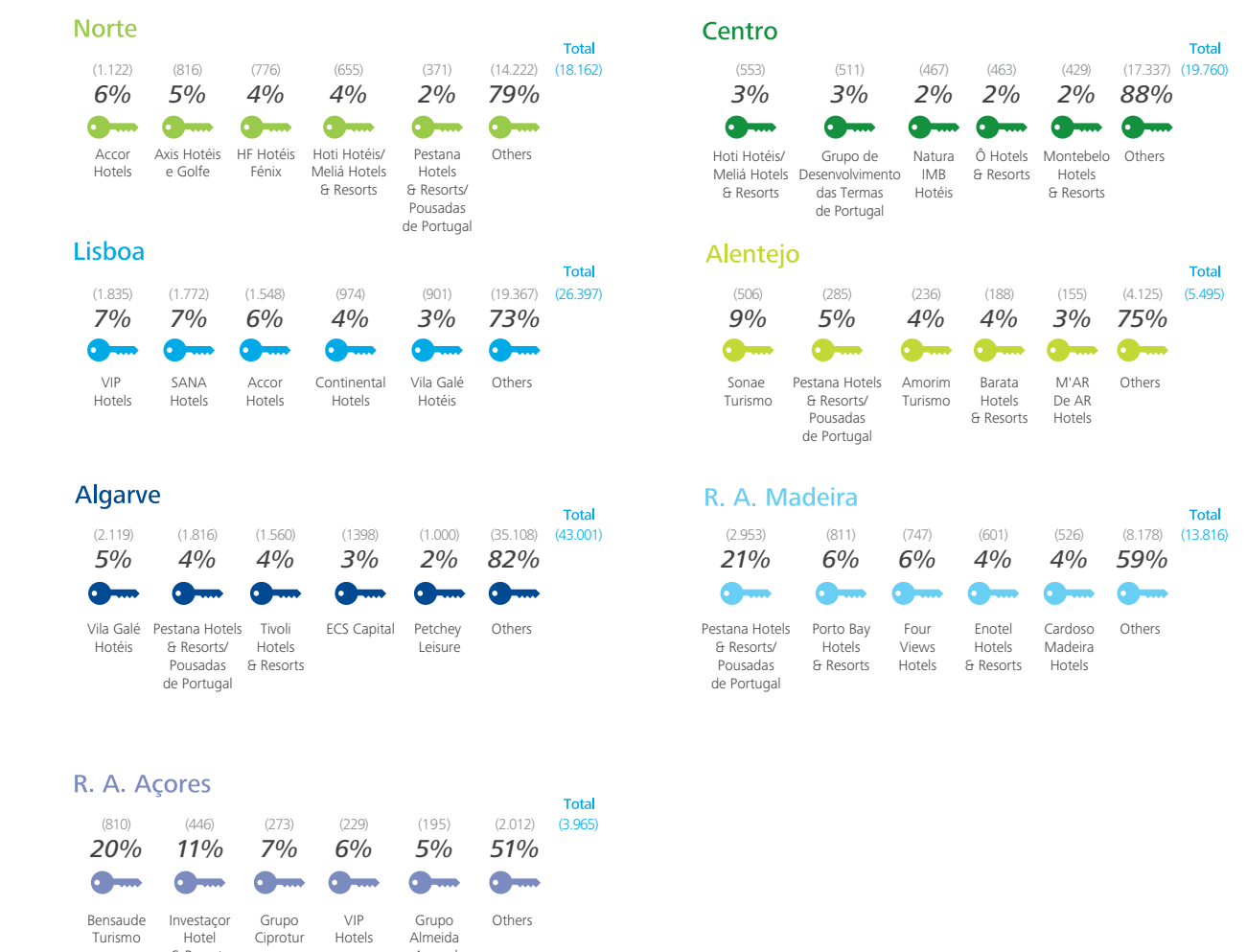


¹ The national average is the average size of the hotel establishments in terms of accommodation units.
 Accommodation units refers to the number of rooms and / or apartments.

Breakdown by type



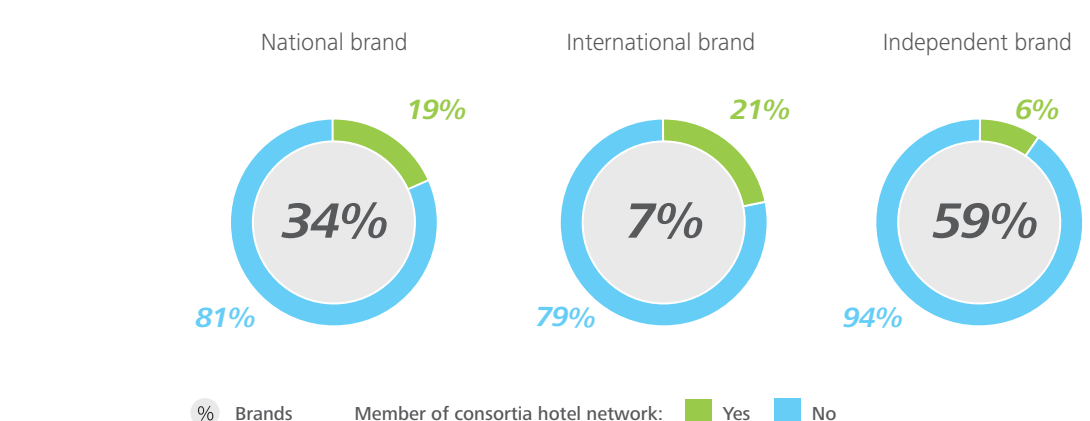
Top 5 Hotel groups / Management entities by NUTS II



New establishments expected for 2014



Representativeness of brands and consortia



Visit the website

Get more info on the Portuguese Hospitality Atlas 2014 and previous editions by visiting our website at atlasdeloitteturismo.com/2014/en

Notes

The technical notes and other information about this study are available on the website.

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