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associação turismo do
algarve

TURISMO DE
PORTUGAL  **algarve**

Golf Tourism Industry 2018



Dobar dan
Hvala vam



Boa tarde
Obrigada



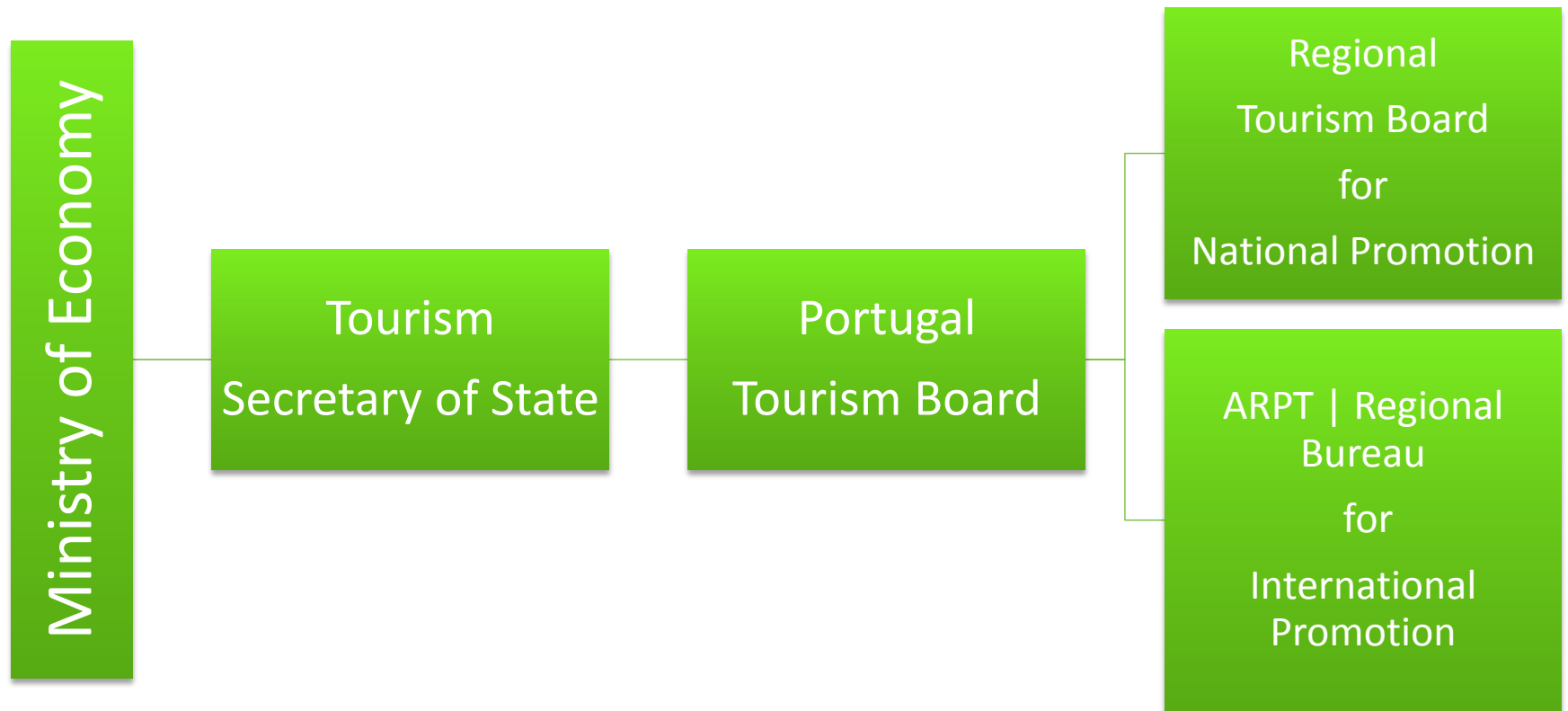
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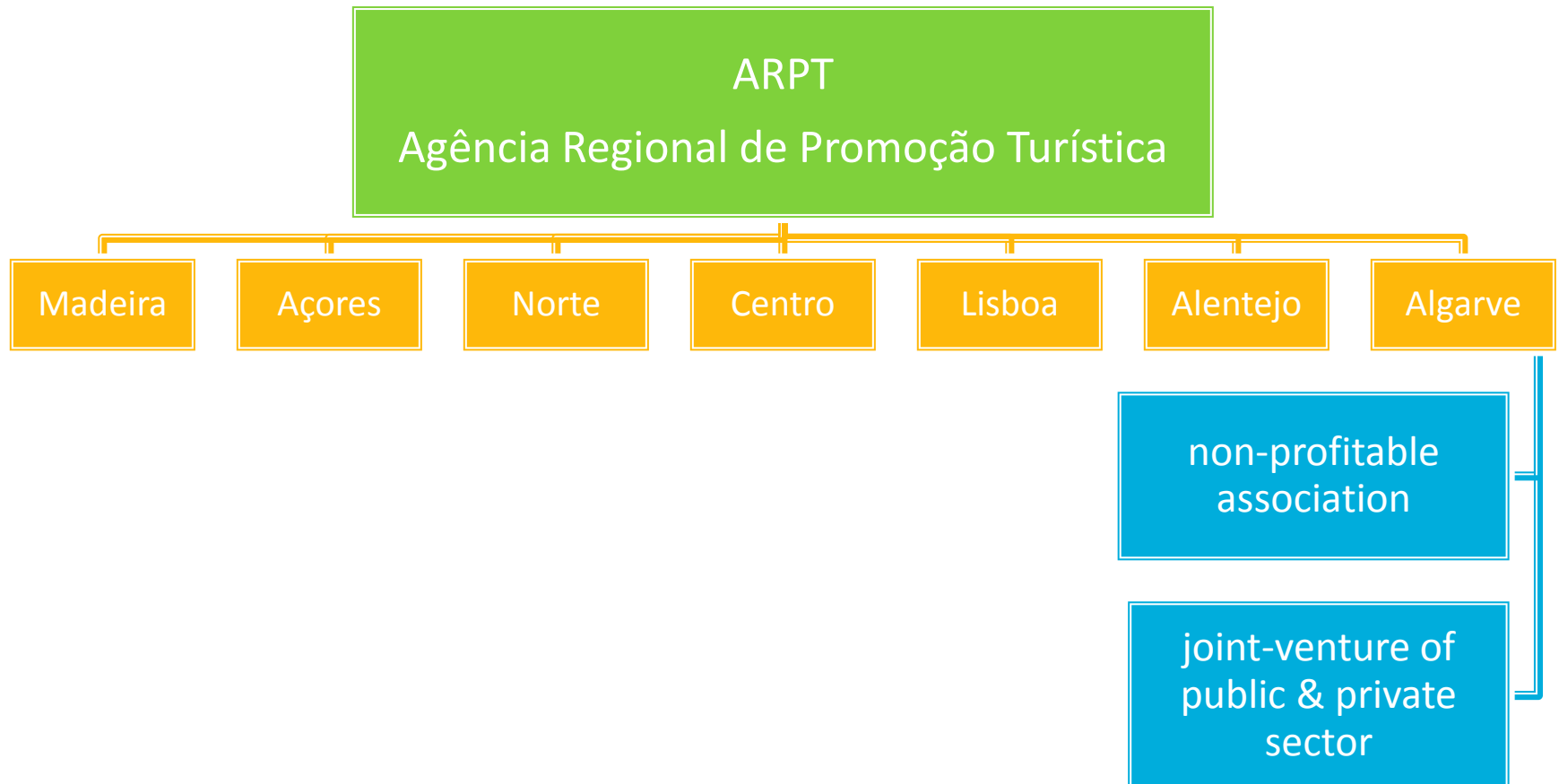


Tourism Government Structure



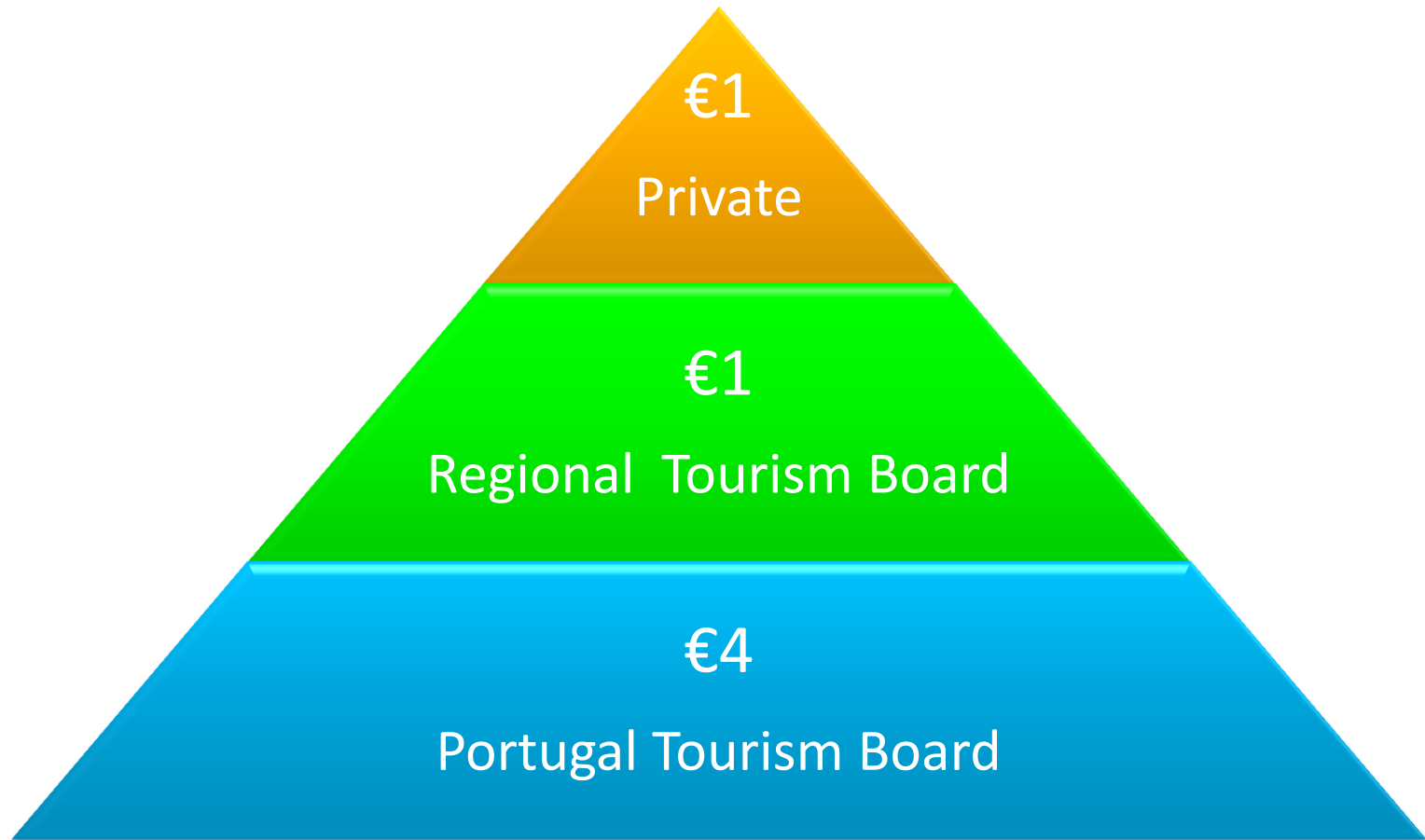


Entities Responsible for International Promotion





Marketing & Promotion Budget Structure



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Tourism Revenue





Portugal

Tourism Overall Revenue 2018

Bank of Portugal	€ millions
TOTAL	16.613.980
UK	2.809.730
France	2.726.450
Spain	2.158.380
Germany	1.900.700
USA	968.120
Netherlands	674.240
Brasil	639.920
Belgium	491.440
Ireland	444.190
Switzerland	408.780
Italy	386.060
Angola	289.630
Luxembourg	223.410

7.601.280.000
in 2010



2018 Accommodation Figures

PORTUGAL

- 57.600.300
 - room nights
- 21.051.000
 - guests
- €3.602 million
 - hotel revenue

ALGARVE

- 18.820.700
 - room nights
- 4.213.500
 - guests
- € 1.081,2 million
 - hotel revenue

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Golf & Accommodation in the Algarve





The Algarve Golf Courses Geographical Location



- 200 km of coastline
- Area of 4,996 km²
- Population 451,006 (2011)

2018 Tourism Figures

- 4.213.500 guests
- 18.820.700 room nights



Golf Courses

Holes	Golf Course	Architect	Opening year
18+9+9	Penina	Sir Henry Cotton	1966
18	Dom Pedro Old Course	Frank Pennick	1969
18	Vale do Lobo Ocean	Sir Henry Cotton	1969
18	Quinta do Lago South	William Mitchell	1974
18	Dom Pedro Pinhal*	Frank Pennick/Remodelled by Robert Trent Jones 1985	1976
18*	Parque da Floresta (Santo António Golf)	Pepe Gancedo	1987
18	San Lorenzo Golf Course	Joseph Lee	1988
18	Dom Pedro Laguna	Joseph Lee	1990
9*	Vale de Milho	Dave Thomas	1990
18	Pestana Alto Golf	Sir Henry Cotton	1991
18	Pestana Gramacho Golf	Nick Price / Ronald Fream	1991
18 +9	Pestana Vila Sol	Donald Steel	1991
9	Pine Cliffs	Martin Hawtree	1991
18	Pestana Vale da Pinta Golf	Ronald Fream	1992
18 + 9	Pinheiros Altos	Ronald Fream	1992
18	Herdade dos Salgados	Pedro Vasconcelos	1994
18	Vale do Lobo Royal	Sir Henry Cotton & Rocky Roquemore	1997
18	Benamor Golf	Sir Henry Cotton	2000



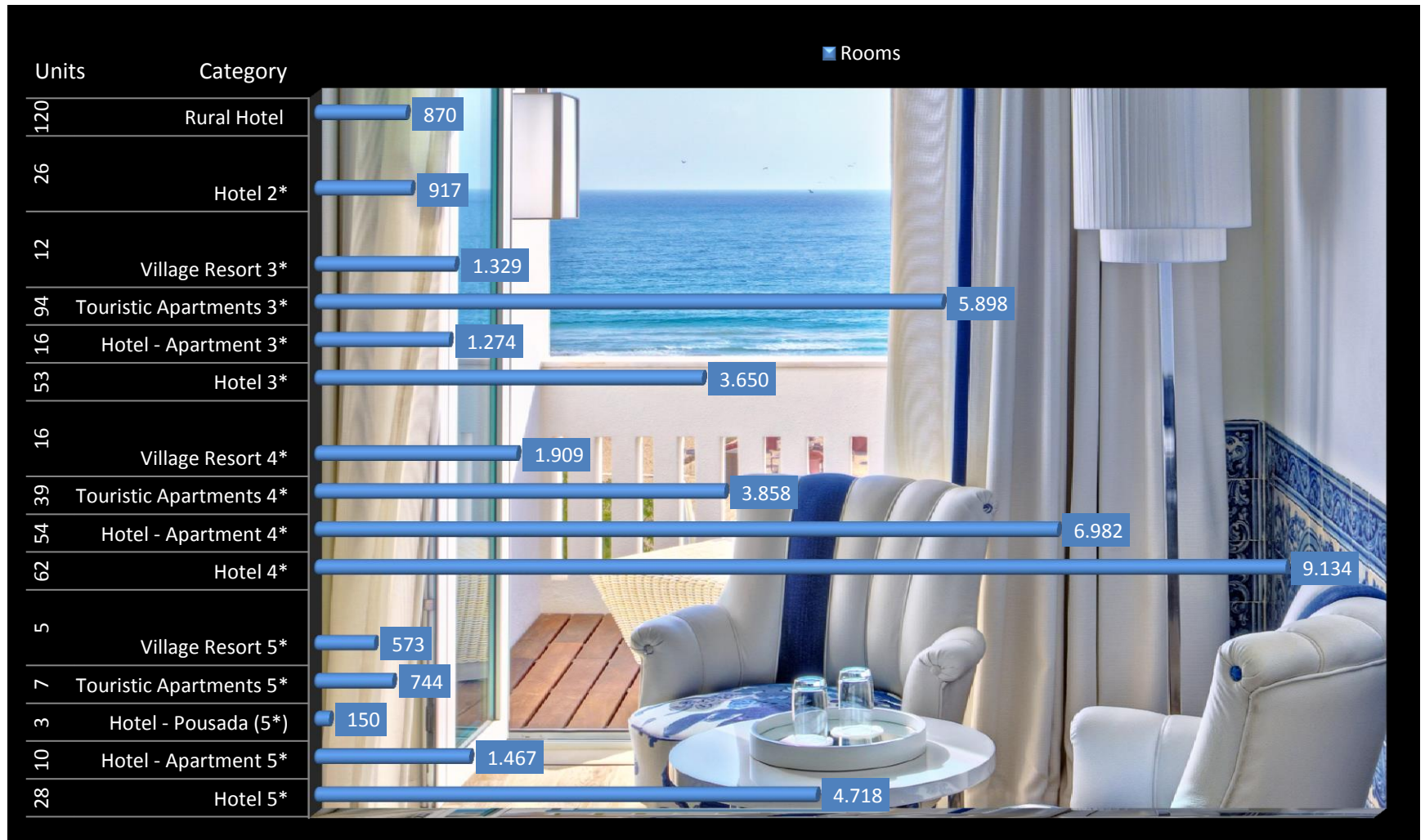
Golf Courses

Holes	Golf Course	Architect	Opening year
18	Dom Pedro Millennium	Martin Hawtree	2000
9*	Balaia Golf Village	Southern Golf	2001
18 + 9	Castro Marim Golf	Terry Murrey	2001
18	Boavista Golf	Howard Swan	2002
18	Quinta da Ria	William Roquemore Jr.	2002
18	Quinta de Cima	William Roquemore Jr.	2002
18	Golfe do Morgado	European Golf Design	2003
18	Dom Pedro Victoria	Arnold Palmer	2004
18	Golfe dos Álamos	European Golf Design	2006
18	Monte Rei	Jack Nicklaus	2007
18	Pestana Silves Golf Course	Fausto Nascimento	2007
9	Oceanico Amendoeira (pitch & put)	-----	2008
18	Oceânico Faldo	Nick Faldo	2008
18	Oceânico O'Connor	Christy O'Connor Jnr.	2008
18	Quinta do Vale Golf Resort	Seve Ballesteros	2008
18	Quinta do Lago Laranjal	Santana da Silva	2009
18 +9	Onyria Palmares Golf*	Robert Trent Jones Jr (Frank Penninck in 1976)	2010
18	Espiche Golf	Peter Saureman	2012
18	Quinta do Lago North*	Beau Welling & Paul McGinley (William Mitchell & (From 6 to 14) – designed by Joseph Lee in 1974 & 1989)	2014



Accommodation 2018

Rooms = 43.473 | Properties = 545



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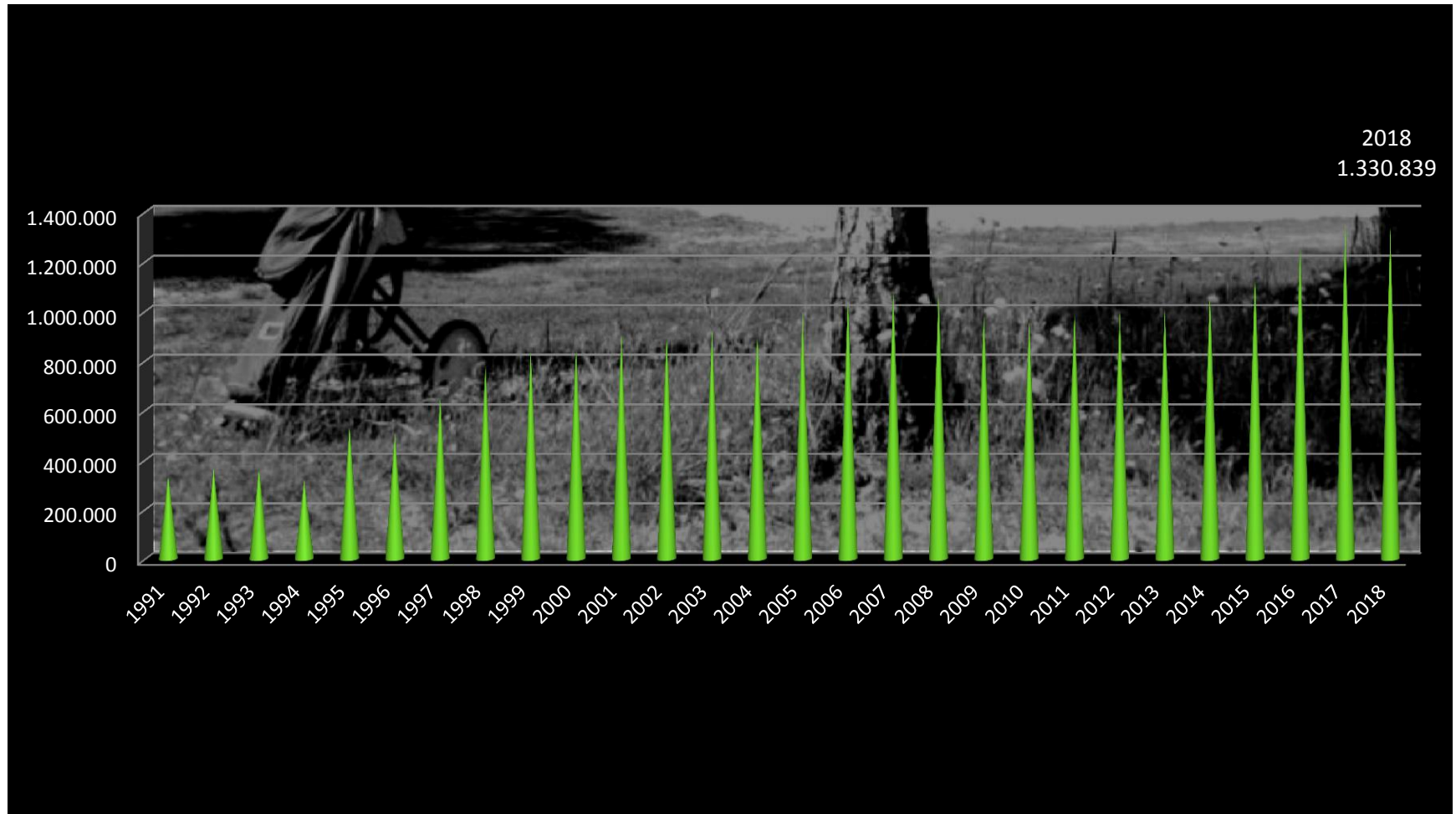
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Rounds of Golf





Rounds of Golf Algarve 1991 - 2018





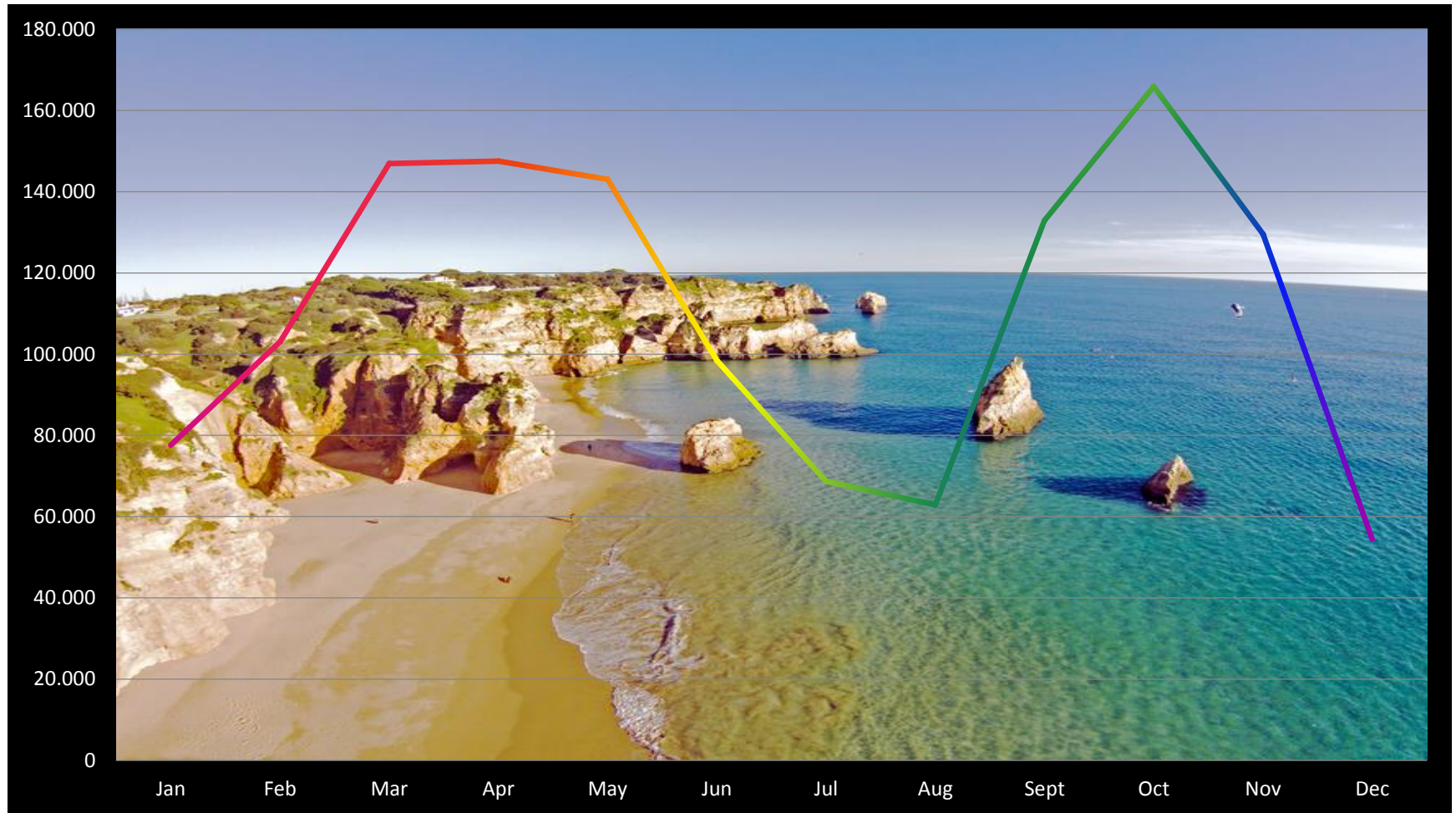
Rounds of Golf Algarve 2018





Rounds of Golf Seasonality

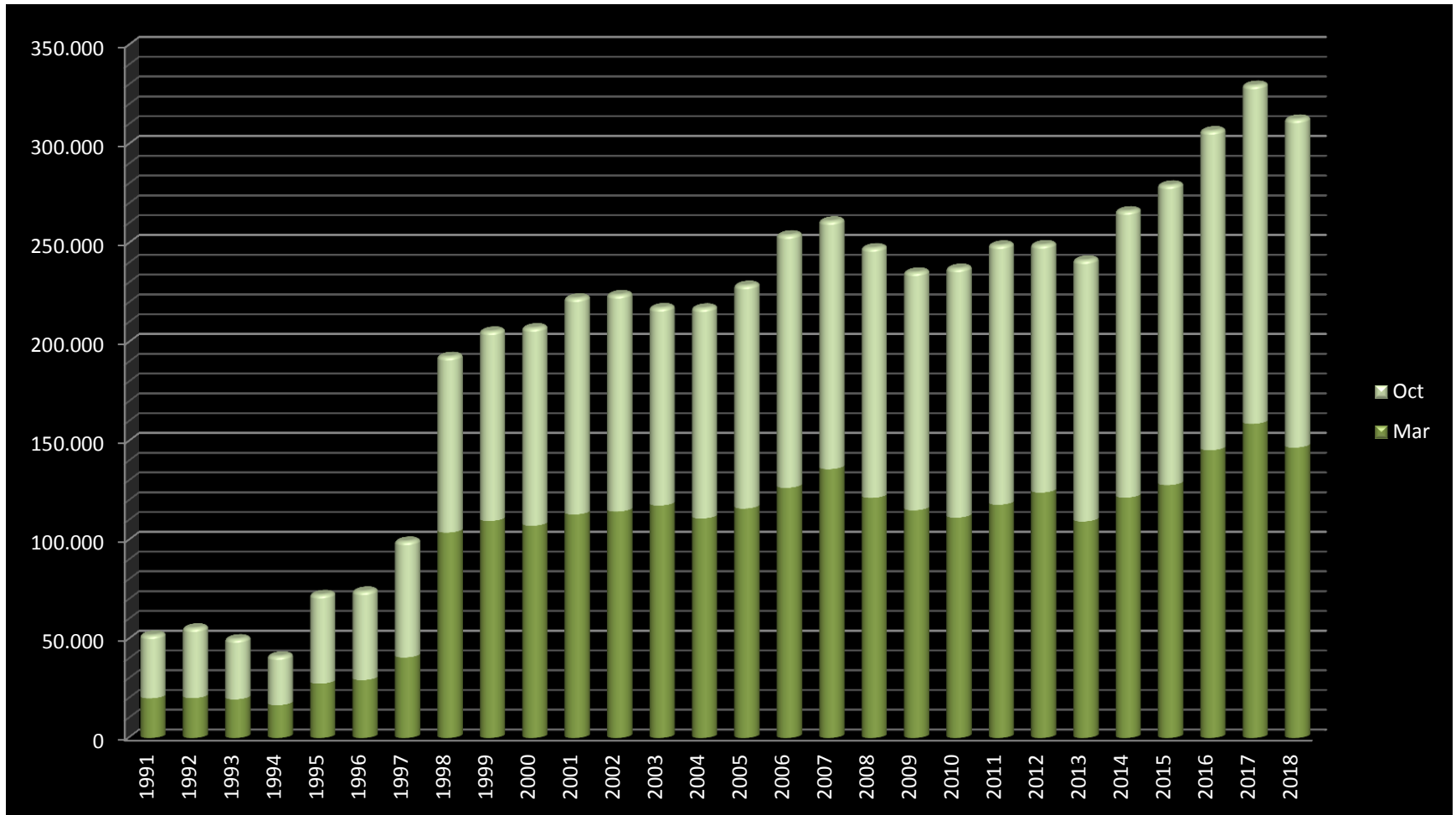
Algarve 2018





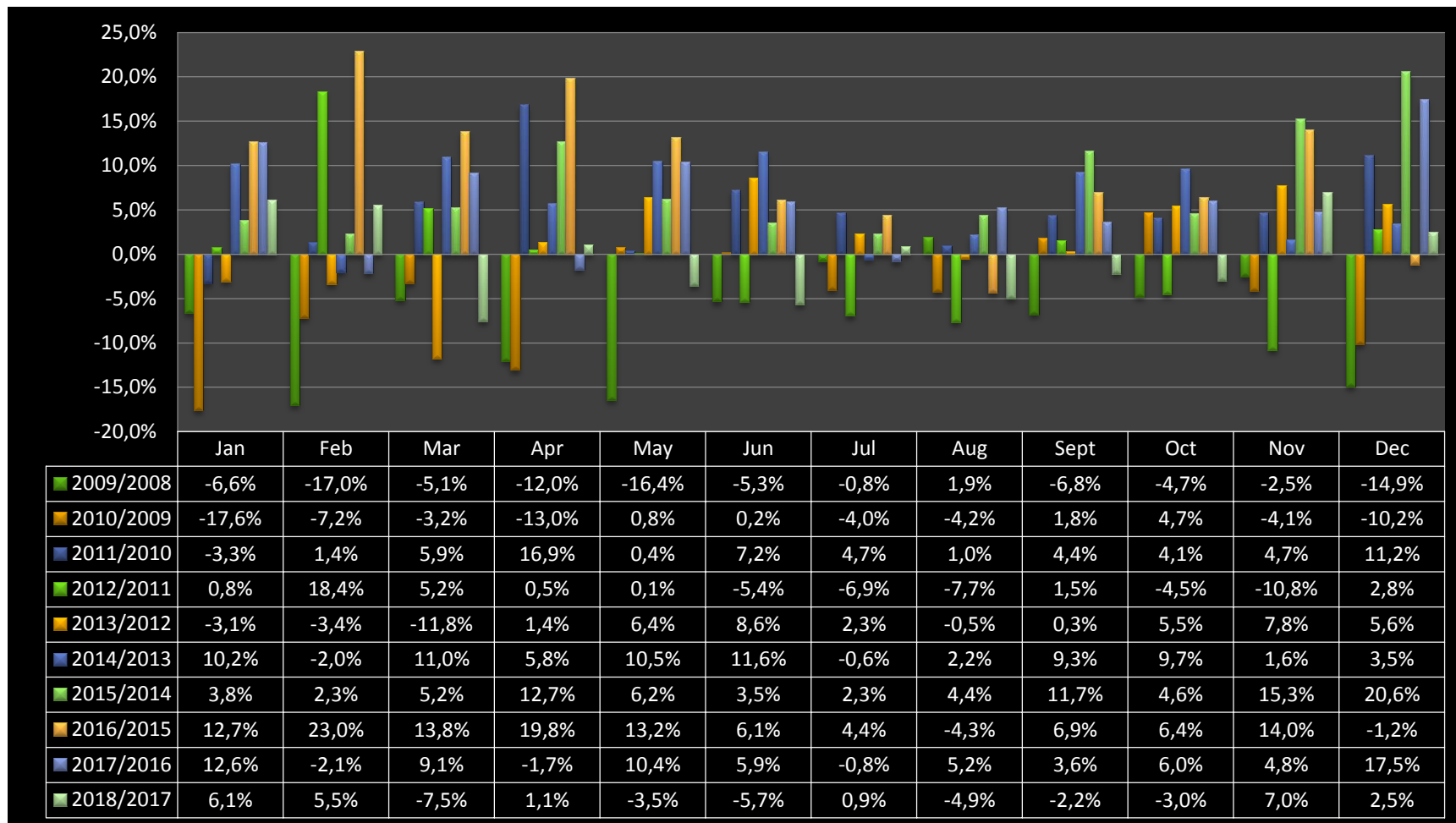
Highest Months | March & October

Algarve 1991 - 2018



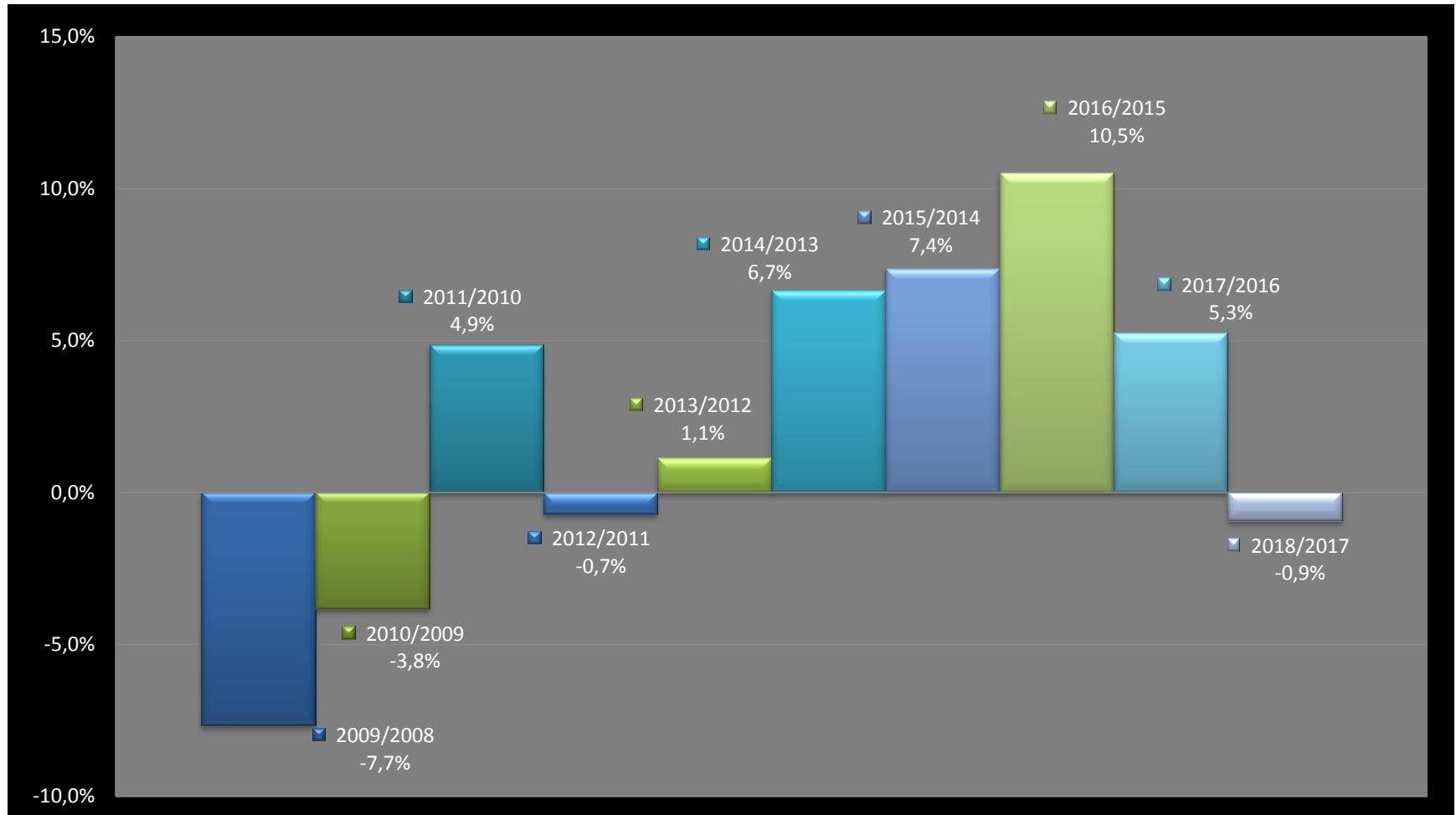


Monthly Rounds of Golf Algarve 2009 to 2018





Total Rounds of Golf Algarve 2009 to 2018

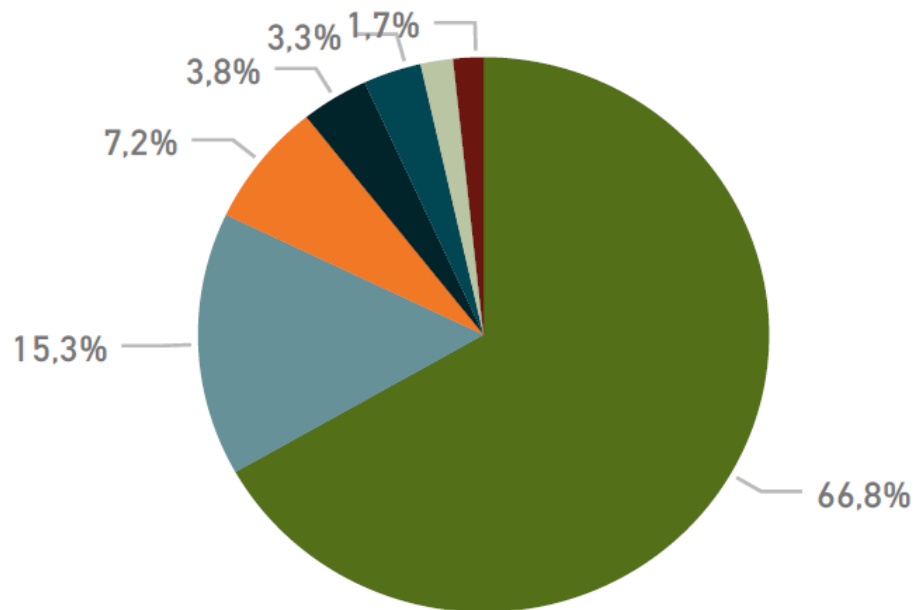




Portugal Rounds of Golf 2018

Algarve Share

Total Rounds = 1.980.951



Golf Courses

Açores	3
Alentejo	4
Algarve	39
Centro	8
Lisboa	16
Madeira	3
Porto e Norte	7
Total	80

● Algarve ● Lisboa ● Centro ● Porto e Norte ● Madeira ● Açores ● Alentejo

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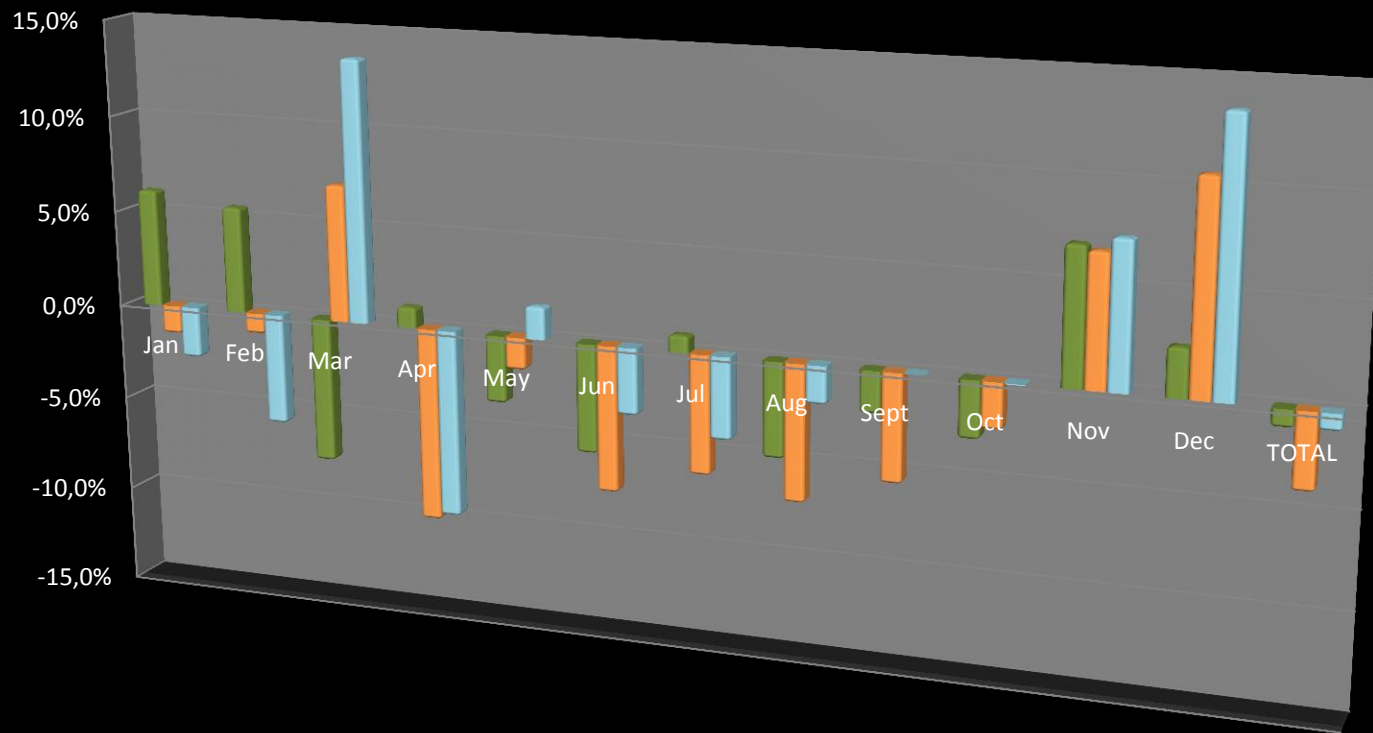
Algarve Rounds | Room Nights | Guests 2018 vs 2017





Rounds | Room Nights | Guests

2018 vs 2017

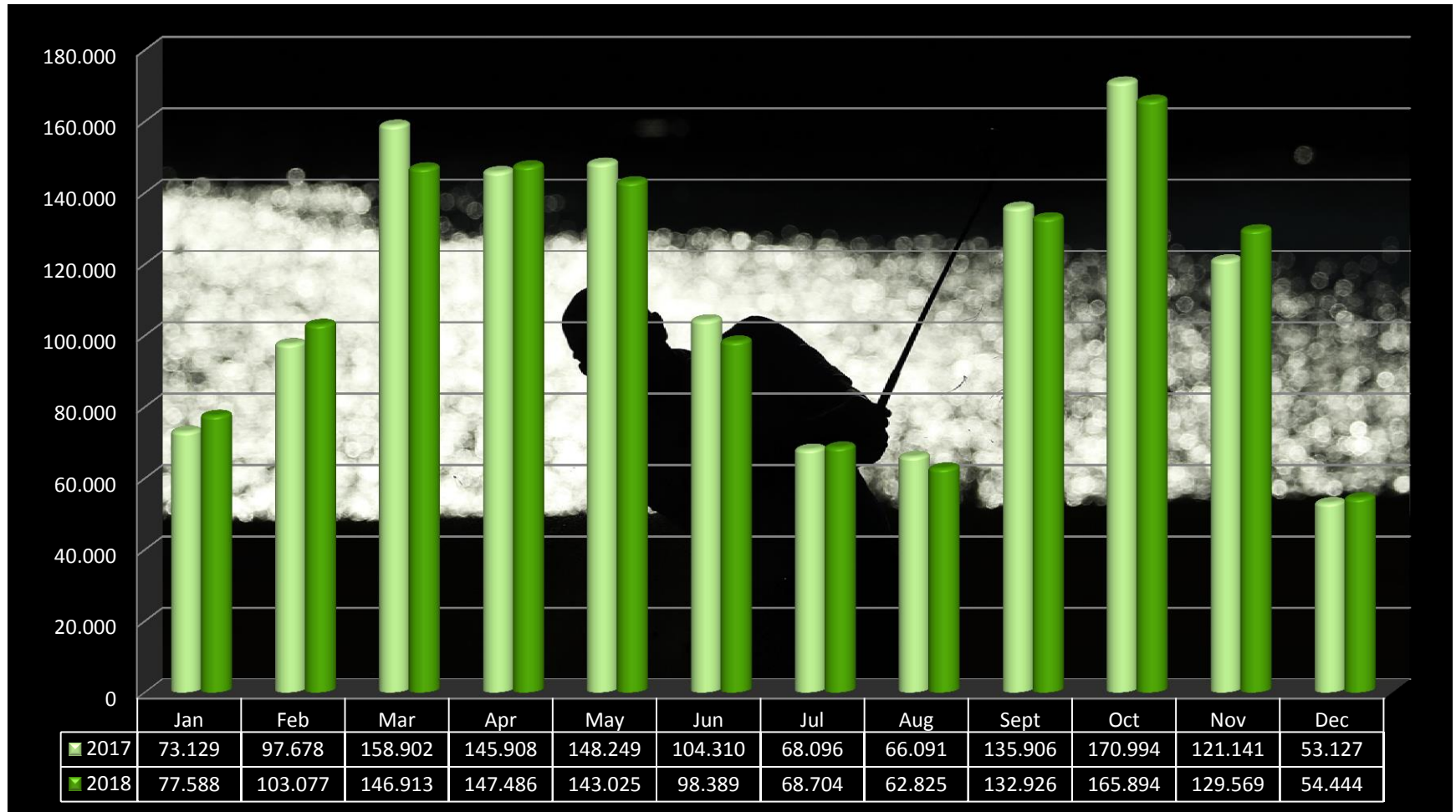


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	TOTAL
rounds of golf	6,1%	5,5%	-7,5%	1,1%	-3,5%	-5,7%	0,9%	-4,9%	-2,2%	-3,0%	7,0%	2,5%	-0,9%
room nights	-1,5%	-1,1%	7,1%	-10,1%	-1,7%	-7,6%	-6,2%	-7,1%	-5,6%	-2,4%	6,7%	10,6%	-3,9%
guests	-2,7%	-5,8%	13,6%	-9,8%	1,7%	-3,5%	-4,3%	-2,0%	0,0%	-0,1%	7,4%	13,6%	-0,9%

Total rounds of golf = 1.330.839 | Total foreign room nights = 14.441.391 | Total foreign guests = 3.001.514



Rounds of Golf 2017 - 2018



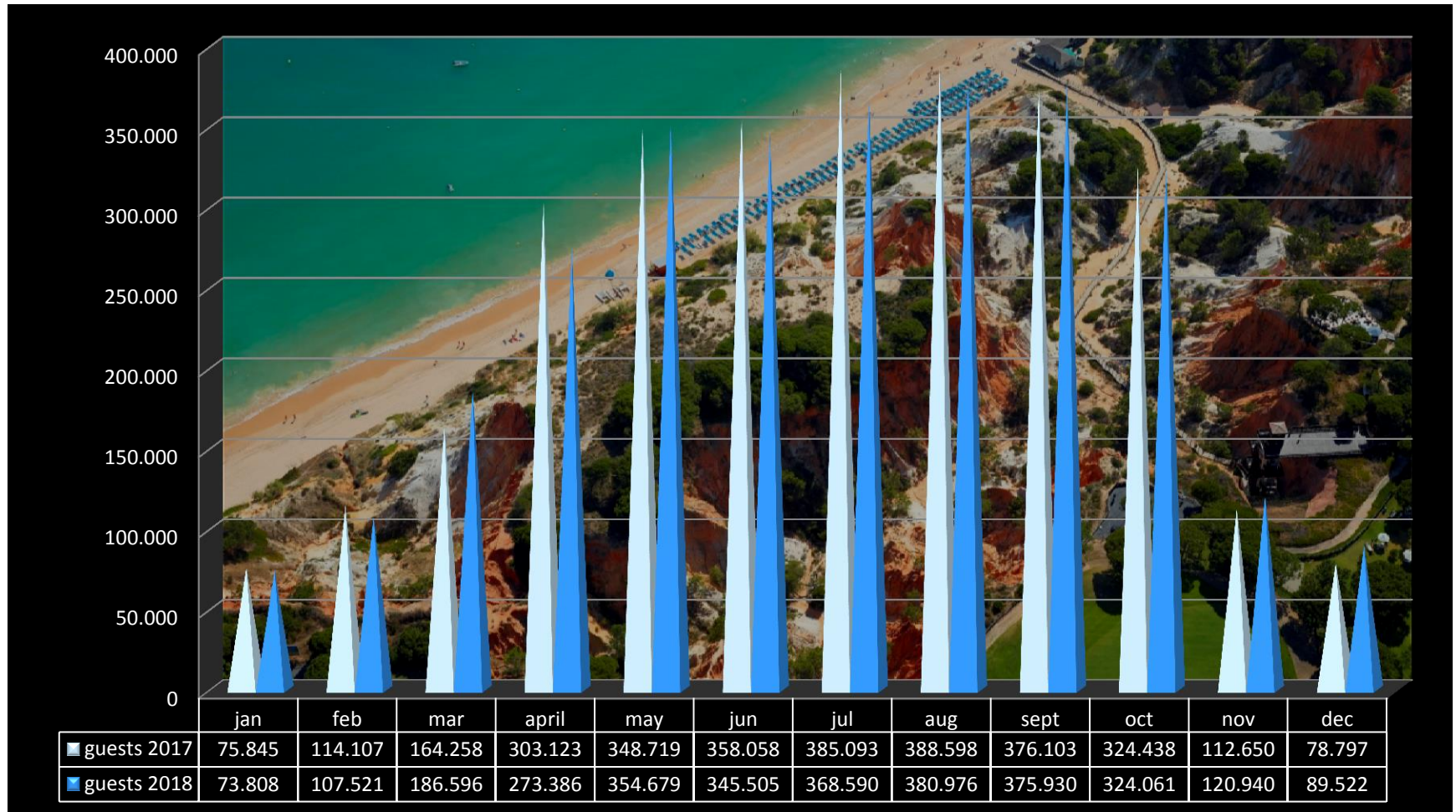


Room Nights 2017 - 2018





Guests 2017 - 2018



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Flights | Carriers | Seats Faro Airport



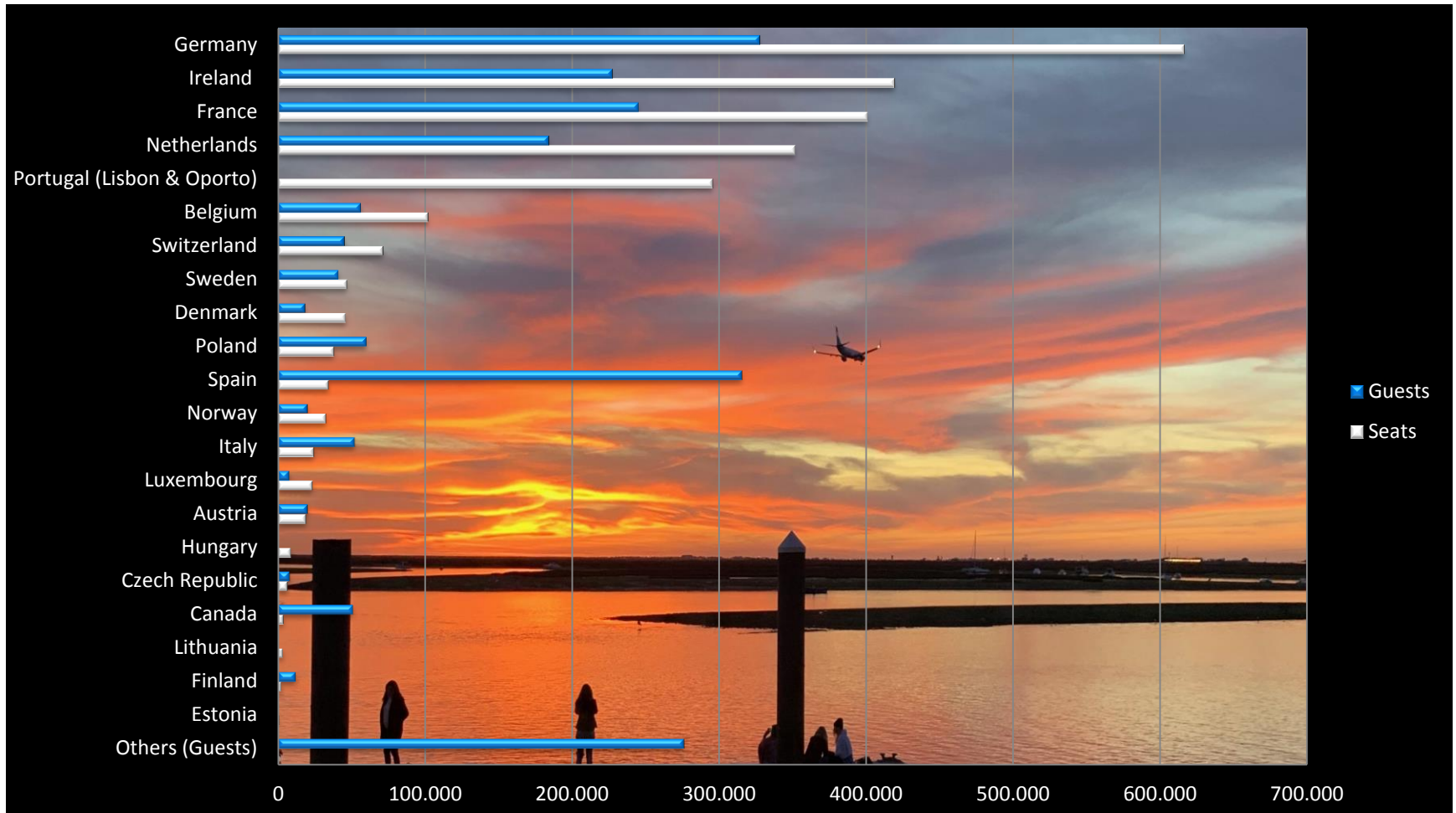


Guests vs Seats Available 1st Jan. to 31st Dec. 2018



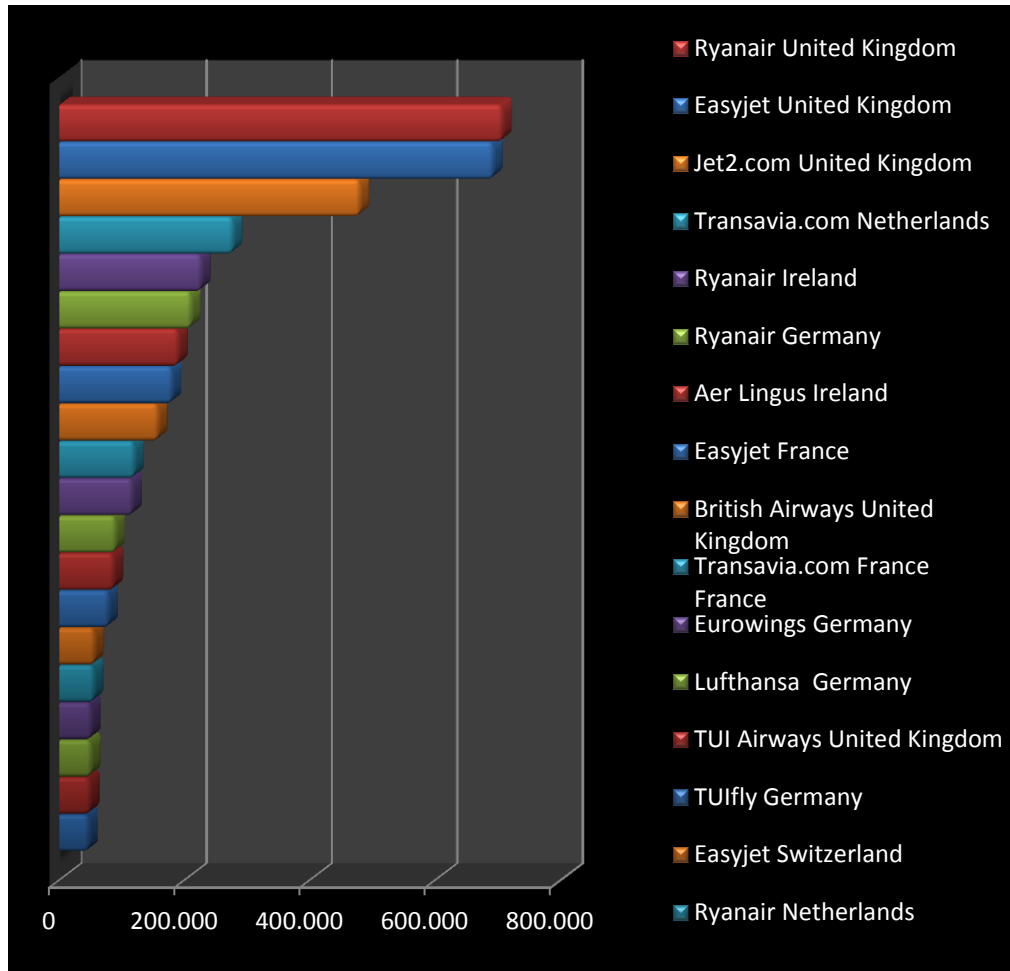


Guests vs Seats (without UK)





Top 20 Seats by Carrier by Country



Carrier	Country	Seats
Ryanair	United Kingdom	706.104
Easyjet	United Kingdom	691.295
Jet2.com	United Kingdom	478.524
Transavia.com	Netherlands	276.211
Ryanair	Ireland	225.666
Ryanair	Germany	209.412
Aer Lingus	Ireland	189.256
Easyjet	France	179.244
British Airways	United Kingdom	156.867
Transavia.com France	France	119.070
Eurowings	Germany	116.223
Lufthansa	Germany	89.070
TUI Airways	United Kingdom	86.145
TUIfly	Germany	78.021
Easyjet	Switzerland	55.452
Ryanair	Netherlands	54.432
Flybe	United Kingdom	50.080
Ryanair	Belgium	49.896
Germania	Germany	48.211
LAUDAMOTION GMBH	Germany	46.116



Carrier by Country (seats) 1st Jan. to 31st Dec. 2018

Carrier	Country	Seats
Eurowings	Austria	15.366
LAUDAMOTION GMBH	Austria	3.402
NIKI	Austria	180
Ryanair	Belgium	49.896
Brussels Airlines	Belgium	39.927
TUI fly Belgium	Belgium	12.099
Air Transat A.T.Inc.	Canada	3.700
SmartWings	Czech Republic	6.451
Norwegian	Denmark	19.344
SAS Scandinavian Airlines	Denmark	17.031
Primera Air	Denmark	9.598
FlexFlight ApS	Estonia	720
Primera Air Nordic	Finland	1.578
TAP Air Portugal	Finland	510
Easyjet	France	179.244
Transavia.com France	France	119.070
Ryanair	France	44.604
Volotea	France	24.625
Aigle Azur	France	21.780
TUI fly Belgium	France	11.203
Ryanair	Germany	209.412
Eurowings	Germany	116.223
Lufthansa German Airlines	Germany	89.070
TUIfly	Germany	78.021
Germania	Germany	48.211
LAUDAMOTION GMBH	Germany	46.116
Easyjet	Germany	27.918
NIKI	Germany	966
Wizz Air	Hungary	8.770
Ryanair	Ireland	225.666
Aer Lingus	Ireland	189.256
TUI Airways	Ireland	3.969

Carrier	Country	Seats
Easyjet	Italy	17.988
Ryanair	Italy	3.591
Volotea	Italy	2.715
Small Planet Airlines	Lithuania	2.160
FlexFlight ApS	Lithuania	1.080
Luxair	Luxembourg	23.370
Transavia.com	Netherlands	276.211
Ryanair	Netherlands	54.432
Corendon DUTCH Airlines	Netherlands	20.790
Norwegian Air Shuttle	Norway	32.385
Ryanair	Poland	15.687
Wizz Air	Poland	13.554
Travel Service Polska	Poland	8.694
Vueling Airlines	Spain	14.544
Iberia	Spain	12.350
TUI fly Belgium	Spain	6.952
Corendon DUTCH Airlines	Spain	378
SAS Scandinavian Airlines	Sweden	28.113
Norwegian Air Shuttle	Sweden	18.786
Easyjet	Switzerland	55.452
Edelweiss Air	Switzerland	15.678
NIKI	Switzerland	180
Ryanair	United Kingdom	706.104
Easyjet	United Kingdom	691.295
Jet2.com	United Kingdom	478.524
British Airways	United Kingdom	156.867
TUI Airways	United Kingdom	86.145
Flybe	United Kingdom	50.080
Aer Lingus	United Kingdom	23.680
Norwegian	United Kingdom	17.298
Thomas Cook Airlines	United Kingdom	13.380
Germania	United Kingdom	144

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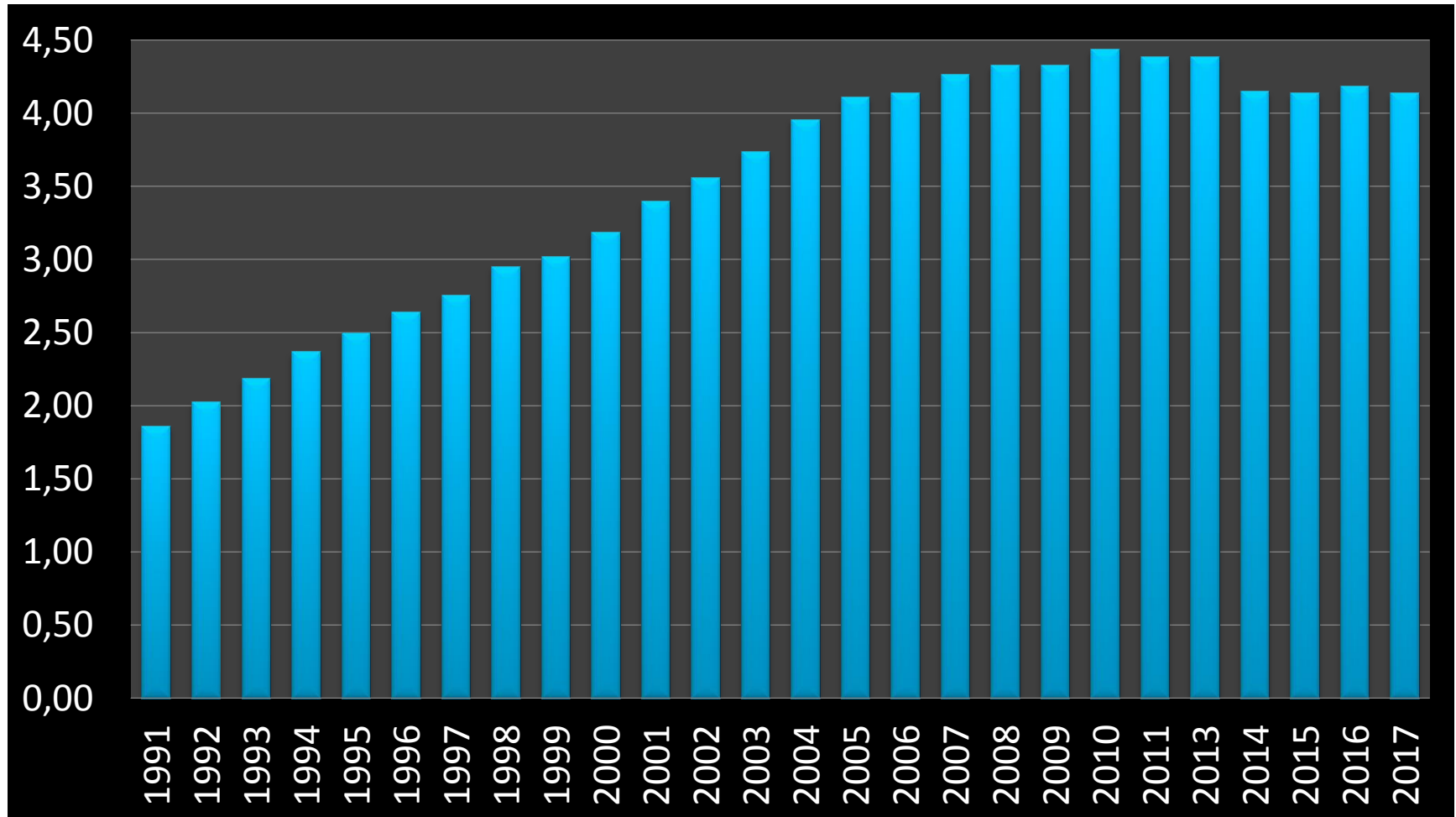
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Golfers in Europe (registered)





Europe Golfers (millions)

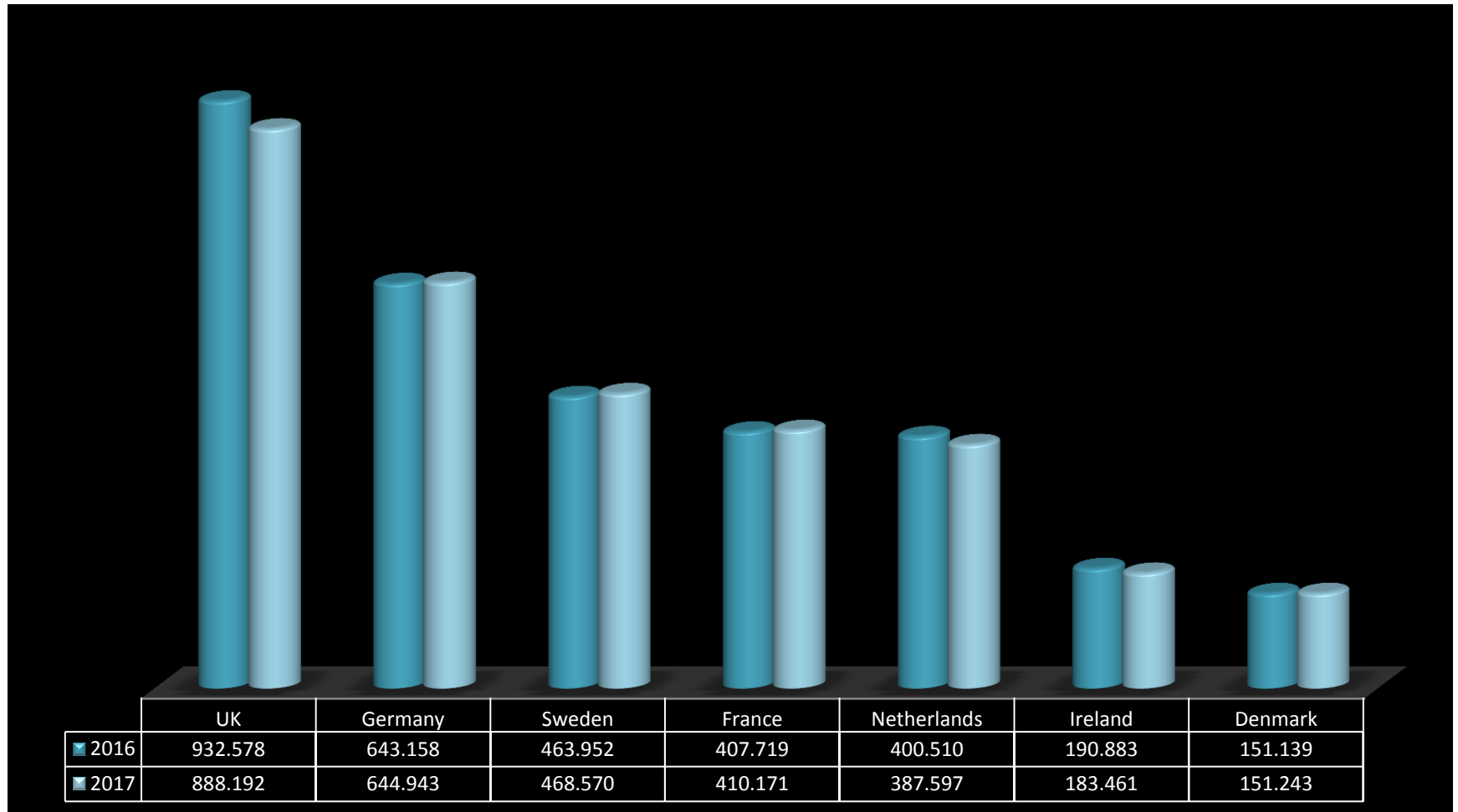


2017 = 4,14 millions



Algarve Main Markets

Total Golfers in each Country





Sources of Research Notes

■ Sources

- Rounds of Golf in Algarve – Associação Algarve Golfe
- Rounds of Golf in Portugal – CNIG
- Guests | Room Nights | Revenue – Turismo de Portugal (INE)
- Official Accommodation - RNT
- Aviation – OAG
- Golf in Europe – KPMG

■ Notes

- 2008 start of the global financial crisis
- 2010 ash cloud (airspace closed from 15th to 20th April)
- There is always a decrease on rounds of golf during Easter month (March or April)

Golfer Profile Golf Economic Impact



Study committed to PwC
by
ATA Algarve & co-financed by Portugal Tourism Board

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