8 July 2024
TOURISM STATISTICS
2023

TOURISM STATISTICS 2023: TOURIST ACTIVITY ABOVE 2019 LEVELS

In 2023, the number of **non-resident tourists' arrivals** in Portugal is estimated to have reached 26.5 million, corresponding to an increase of 19.2% compared to 2022 (+7.7% vis-à-vis 2019). Spain remained the main foreign inbound market for international tourists (share of 25.2%), having registered a 16.7% growth compared to the previous year.

The **whole set of means of tourist accommodation** (tourist accommodation establishments[1], camping sites and holiday camps, and youth hostels) amounted to 32.5 million guests, in 2023, which provided 85.1 million overnight stays, corresponding to variations of +12.5% and +10.3%, respectively, figures that reflect average annual growth of 2.4% and 2.3%, in the same order, since 2019, showing the recovery of activity in the sector after the crisis caused by the COVID-19 pandemic. The domestic market generated 1/3 of overnight stays in 2023, 28.1 million, 2.1% more than the previous year, and foreign markets gave rise to 57.1 million overnight stays, reflecting an annual growth of 14.9%.

Overnight stays from non-residents accounted for 67.0% of overnight stays in the whole set of means of tourist accommodation, being 2023 the year, since 2013, with greater dependence on external markets, only surpassed by 2017 levels, in which these markets accounted for 67.8% of the total.

The seasonality rate fell to 36.9% and reached its lowest value since 2013. This indicator was higher for residents (41.3%) than for non-residents (34.8%).

In tourist accommodation establishments[1], total revenue amounted to EUR 6.0 billion (+20.0%) and revenue from accommodation to EUR 4.6 billion (+21.4%). The revenue per available room (RevPAR) reached EUR 64.8 (+15.4%) and the average daily rate was EUR 113.0 (+9.1%). The Herfindahl-Hirschman index (HHI) shows a downward trend in the concentration of total revenue (and therefore an increase in competition), with small fluctuations during the COVID-19 pandemic, and in 2023 it reached its lowest value since 2013.

The **tourist trips of residents** reached 23.7 million, reflecting an annual change of +4.6%, yet bellow 2019 values (-3.2%). Domestic trips increased by 2.4%, although still below pre-pandemic levels (-4,3% compared to 2019), reaching 20.4 million. On the other hand, trips abroad reached 3.2 million in 2023 (+21.5% compared to 2022) and surpassed the 2019 figures (+4.1%).

In 2022, the **average expenditure per tourist** on each trip increased by 4.3% compared to 2022, standing at EUR 242.4 (+23.9% compared to 2019). On national territory trips, residents spent, on average, EUR 164.3 per tourist/trip, EUR +1,1 than in 2022 and EUR +31.3 compared to 2019. On trips abroad, the average expenditure per tourist/trip was EUR 736.6, -2.1% compared to the previous year and +17.5% compared to 2019.

[1] Hotel activity (hotels, apartment hotels, tourist apartments, tourist villas, pousadas, and quintas da Madeira), rural/lodging tourism, and local accommodation (LA with ten or more beds).

With this press release, Statistics Portugal discloses the publication of "Tourism Statistics 2023", which includes a wide range of indicators on tourism activity in Portugal in terms of supply and demand.

Non-resident tourists' arrivals in Portugal exceeded 2019 levels

2023 was marked by signs of recovery from the crisis in the sector caused by the COVID-19 pandemic, exceeding 2019 levels of the main indicators.

It is estimated that the number of non-resident tourist arrivals in Portugal will have reached 26.5 million in 2023, corresponding to an increase of 19.2% compared to 2022. Compared to 2019, there was a 7.7% increase in the number of non-resident tourist arrivals in Portugal.

The Spanish market remained the main source market for international tourists (25.2% share), having grown by 16.7% compared to the previous year. The UK market (12.6% of the total) regained its position as the second main inbound market, increasing by 14.0%, while the number of French tourists (12.4% of the total, the second main market in 2022) grew by 11.0%. Apart from the 'Other countries of the World' grouping (+44.8%), the biggest increases were recorded by the North American (34.2%) and Italian (+29.2%) markets.

Table 1. **Non-resident tourists' arrivals in Portugal, 2022-2023**

Unit: 10^3

Country of residence	2022	2023	Share (%)		Year-on-year change rate (%)
			2022	2023	
TOTAL	22 254.2	26 535.2	100.0%	100.0%	19.2%
Spain	5 736.7	6 693.1	25.8%	25.2%	16.7%
United Kingdom	2 927.5	3 338.6	13.2%	12.6%	14.0%
France	2 955.6	3 280.4	13.3%	12.4%	11.0%
Germany	1 805.0	2 128.8	8.1%	8.0%	17.9%
Switzerland	1 009.6	1 194.4	4.5%	4.5%	18.3%
Italy	699.7	903.8	3.1%	3.4%	29.2%
Netherlands	794.2	876.0	3.6%	3.3%	10.3%
Ireland	654.2	781.4	2.9%	2.9%	19.4%
Belgium	546.1	592.1	2.5%	2.2%	8.4%
Nordic Countries	513.0	575.5	2.3%	2.2%	12.2%
Other from Europe	954.6	1 194.5	4.3%	4.5%	25.1%
United States	1 135.4	1 523.7	5.1%	5.7%	34.2%
Brazil	1 059.2	1 333.9	4.8%	5.0%	25.9%
Other	1 463.5	2 118.9	6.6%	8.0%	44.8%

Source: Statistics Portugal

Main statistical indicators on tourist activity above 2019 levels

Considering **all means of accommodation** (tourist accommodation establishments, camping sites and holiday camps, and youth hostels), on 31 July 2023, 8,015 establishments[2] were active and had guests, corresponding to an increase of 7.9% compared to 2022 and an average annual increase of 2.9% since 2019.

The whole set of means of tourist accommodation recorded increases of 12.5% in the number of guests and 10.3% in overnight stays, totalling 32.5 million and 85.1 million, respectively. These figures also reflect average annual growth of 2.4% and 2.3%, in the same order, since 2019, showing the recovery of activity in the sector following the crisis caused by the COVID-19 pandemic.

Table 2. **Main indicators of accommodation activity, 2022-2023**

Global results	Unit	2019	2022	2023	Year-on-year change rate (%) 2022-2023
Establishments	nº	7 155	7 431	8 015	7.9
Capacity	"	643 308	658 040	679 338	3.2
Guests	10^3	29 495.4	28 860.9	32 481.8	12.5
Overnight stays	10^3	77 822.7	77 174.5	85 149.1	10.3
Average stay	no. of night	2.64	2.67	2.62	-2.0
Net bed occupancy rate *	%	47.3	45.7	48.0	2.3 p.p.
Net bedroom occupancy rate *	%	55.3	54.2	57.3	3.1 p.p.
Total revenue *	10^6 €	4 295.8	5 014.1	6 015.3	20.0
Revenue from accommodation *	"	3 229.9	3 808.3	4 622.6	21.4
RevPAR (Revenue per available room) *	€	49.4	56.2	64.8	15.4
ADR (Average Daily Rate) *	€	89.2	103.6	113.0	9.1

* Only tourist accommodation establishments: hotels, local accommodation (with 10 or more beds) and tourism in rural areas and lodging tourism.

Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodations, Survey on guests stays in holiday camps and youth hostels, Survey on guests stays in camping sites

All regions recorded increases in the number of overnight stays in 2023, with Oeste e Vale do Tejo (+18.2%), Norte (+14.0%) and Grande Lisboa (+11.8%) standing out with the highest variations, while Algarve (+6.7%) and Centro (+6.9%) recorded less significant rates of change. Compared to 2019, Algarve and Península de Setúbal were the exceptions, with overnight stays still below pre-pandemic levels (-1.5% and -0.9% respectively).

The domestic market generated 1/3 of overnight stays in 2023, 28.1 million, 2.1% more than the previous year, and the external markets originated 57.1 million overnight stays, reflecting an annual growth of 14.9%. Compared to 2019, overnight stays of non-residents became more significant, albeit very slightly (+0.6 p.p.), and grew by 10.4%, above the variation recorded in overnight stays of residents (+7.5%).

The United Kingdom remained the main external market in 2023 (18.0% of total overnight stays from non-residents) and recorded a 10.2% increase in overnight stays (+5.9% compared to 2019), followed by the German market (11.8% of the total), which increased by 12.4% (+5.9% compared to 2019), still ranking 2nd. Spain

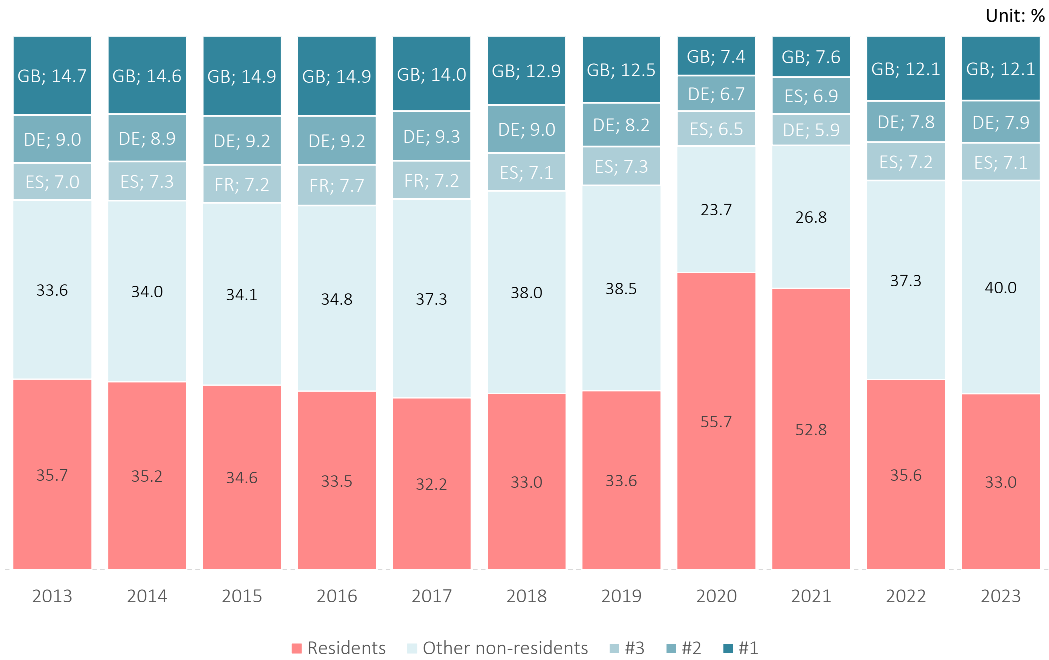
[2] Hotels, apartment hotels, tourist apartments, tourist villages, pousadas, quintas in Madeira, tourism in rural areas, lodging tourism and local accommodation with 10 or more beds, camping sites, holiday camps, and youth hostels.

remained the 3rd largest external market (10.6% of the total) and recorded an increase of 8.3% (+5.4% compared to 2019).

Weight of the three main markets with a downward trajectory

Overnight stays spent by non-residents accounted for 67.0% of overnight stays in the whole set of means of tourist accommodation in 2023, being this the greater dependence on international markets, since 2013, only surpassed in 2017, when these markets accounted for 67.8% of the total.

Figure 1. **Shares of overnight stays by residents and non-residents in all means of accommodation, 2013-2023**

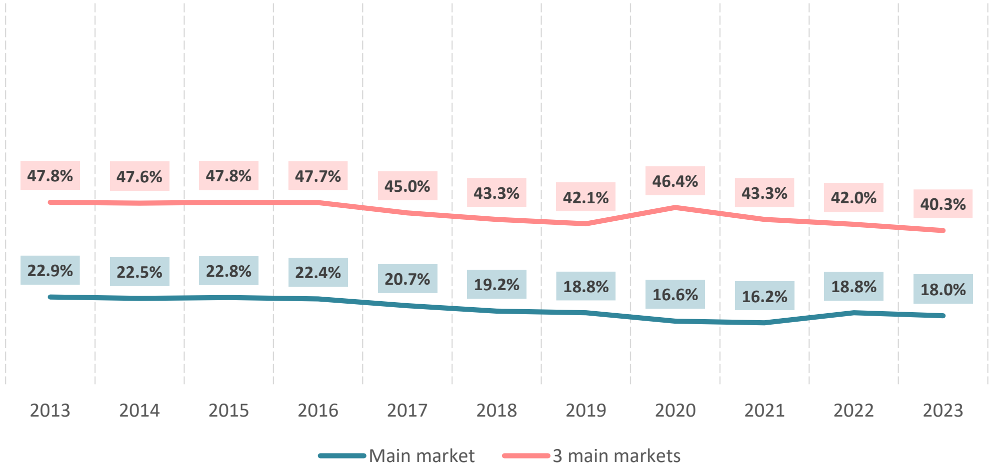


#1 – Main foreign market in the year; #2 – Second main foreign market in the year; #3 – Third main foreign market in the year
GB – United Kingdom; DE – Germany; ES – Spain; FR – France
Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodations, Survey on guests stays in holiday camps and youth hostels, Survey on guests stays in camping sites

When considering the period between 2013 and 2023, the dependence on the main foreign market recorded its third lowest value in 2023, only exceeded in 2021 and 2020 (in which the main market accounted for, respectively, 16.2% and 16.6% of overnight stays spent by non-residents), years heavily influenced by the COVID-19 pandemic. Compared to 2013, there was a decrease of 4.9 p.p. in the weight of the main market in total overnight stays spent by non-residents.

Analysing the three main foreign markets as a whole, in 2023, they accounted for 40.3% of total overnight stays by non-residents in whole set of means of tourist accommodation, being the lowest figure since 2013. Excluding 2020 and 2021, which were more influenced by the crisis caused by the COVID-19 pandemic, the weight of the three main markets has been falling since 2016. When compared to 2013, there was a decrease of 7.5 p.p..

Figure 2. Shares of overnight stays by main external markets in all means of accommodation, 2013-2023

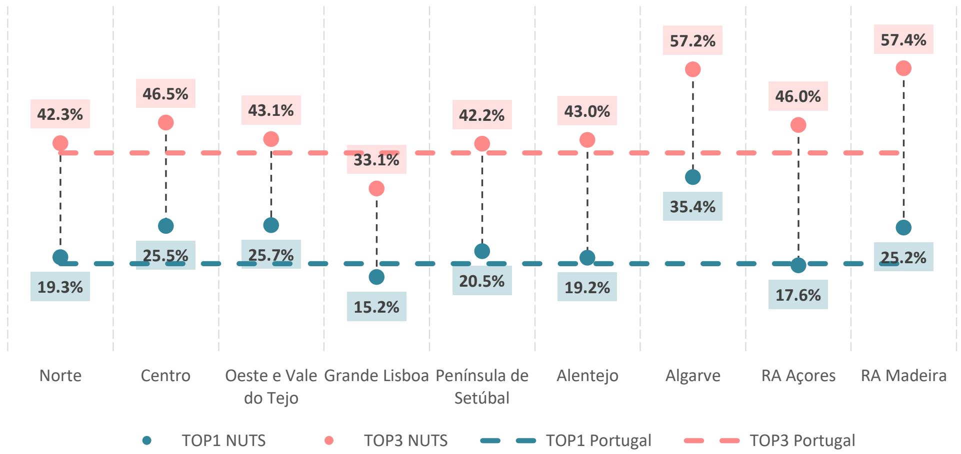


Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodations, Survey on guests stays in holiday camps and youth hostels, Survey on guests stays in camping sites

In 2023, Grande Lisboa was the NUTS II region with the lowest dependence on both the main external market (15.2%) and the three main external markets as a whole (33.1%). The regions with the lowest dependence on the main external market were RA Açores (17.6%), Alentejo (19.2%) and Norte (19.3%), while Península de Setúbal was the second region with the lowest dependence on the three main external markets as a whole (42.2%).

Conversely, Algarve was the region most dependent on the main foreign market, accounting for 35.4% of overnight stays of non-residents in the region. It was followed by Oeste e Vale do Tejo (25.7%) and Centro (25.5%). RA Madeira was the region most dependent on the three main external markets as a whole (57.4%), followed by Algarve (57.2%).

Figure 3. Shares of overnight stays by main external markets in all means of accommodation, by NUTS II region, 2023

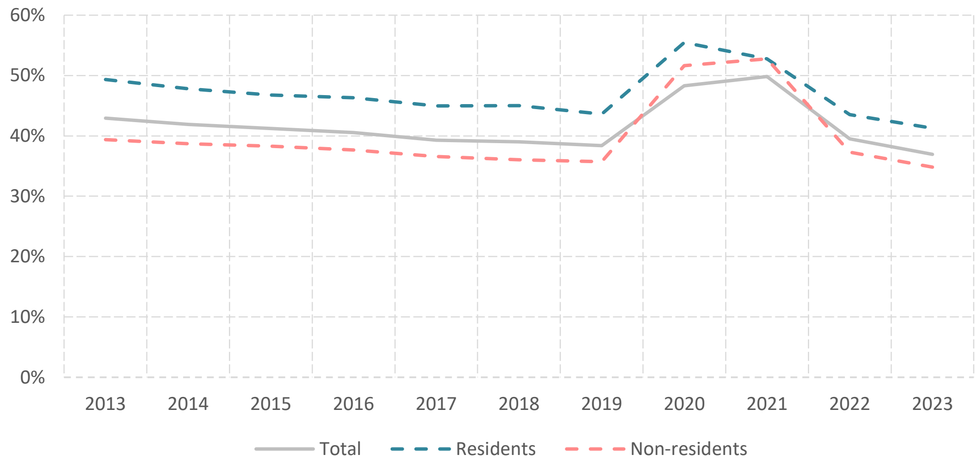


Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodations, Survey on guests stays in holiday camps and youth hostels, Survey on guests stays in camping sites

Seasonality rate at its lowest since 2013

The seasonality rate, i.e. the relative weight of the three months with the highest demand in relation to the annual total, fell to 36.9% and reached its lowest value since 2013. This indicator was higher for residents (41.3%) than for non-residents (34.8%).

Figure 4. **Seasonality rate in all means of accommodation, 2013-2023**



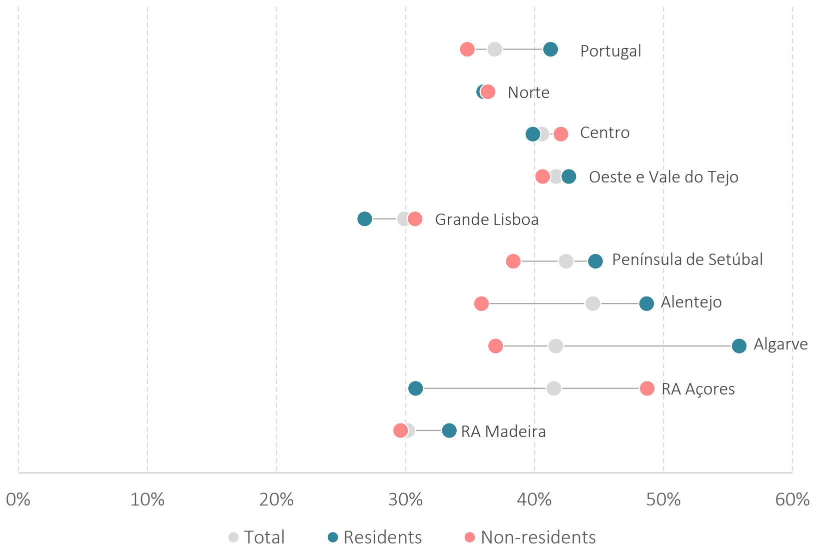
Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodations, Survey on guests stays in holiday camps and youth hostels, Survey on guests stays in camping sites

Alentejo was the region with the highest seasonality rate (44.5%), followed by Península de Setúbal (42.5%), while Grande Lisboa and RA Madeira had the lowest values for this indicator (29.9% and 30.2%, respectively).

Considering overnight stays spent by residents, Algarve was the only region to show a seasonality rate above 50% (55.9%). In Grande Lisboa and RA Açores, this indicator reached 26.8% and 30.8%, respectively.

Regarding overnight stays of non-residents, the highest seasonality rates were observed in RA Açores (48.7%) and Centro (42.1%). Conversely, RA Madeira (29.6%) and Grande Lisboa (30.7%) recorded the lowest values for this indicator.

Figure 5. **Seasonality rate in all means of accommodation, by NUTS II region, 2023**



Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodations, Survey on guests stays in holiday camps and youth hostels, Survey on guests stays in camping sites

Overnight stays increase in all means of accommodation

In 2023, tourist accommodation establishments (hotels, local accommodation, and rural/lodging tourism) registered 30.0 million guests, spending 77.2 million overnight stays (+13.2% and +10.7% respectively).

Camping sites welcomed 2.1 million campers (+3.6%), corresponding to 7.2 million overnight stays (+6.3%). Compared to 2019, the number of campers grew slightly (+1.3%), but overnight stays were lower (-2.6%).

Holiday camps and youth hostels hosted 347.5 thousand guests (+12.3%) and a total of 781.4 thousand overnight stays (+9.2%).

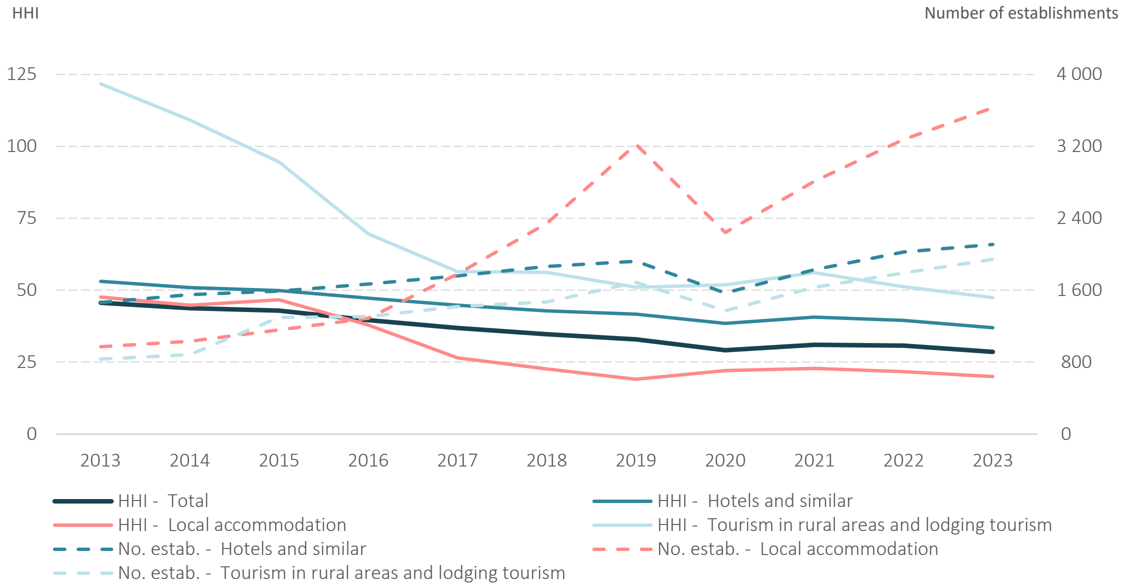
Revenue concentration in the sector on a downward trend

Overnight stays in tourist accommodation establishments (hotels, local accommodation, and rural/lodging tourism) resulted in growths of 20.0% in total revenue and 21.4% in revenue from accommodation in 2023, amounting, respectively, to EUR 6.0 billion and EUR 4.6 billion, figures that reflect, in the same order, average growth of 8.8% and 9.4% per year since 2019.

The revenue per available room (RevPAR) was EUR 64.8 (+15.4%) and the average daily rate (ADR) was EUR 113.0 (+9.1%).

The Herfindahl-Hirschman index (HHI), an indicator that evaluates concentration levels, calculated based on total revenue from tourist accommodation establishments (hotels, local accommodation, and rural /lodging tourism), shows a downward trend of the sector concentration (and therefore an increase in competition), with small fluctuations during the COVID-19 pandemic, reaching 28.5 in 2023 (45.6 in 2013), the lowest value in this period. By segment, in 2023, the HHI was the lowest in local accommodation (20.0), followed by hotels (37.0) and rural and lodging tourism (47.4).

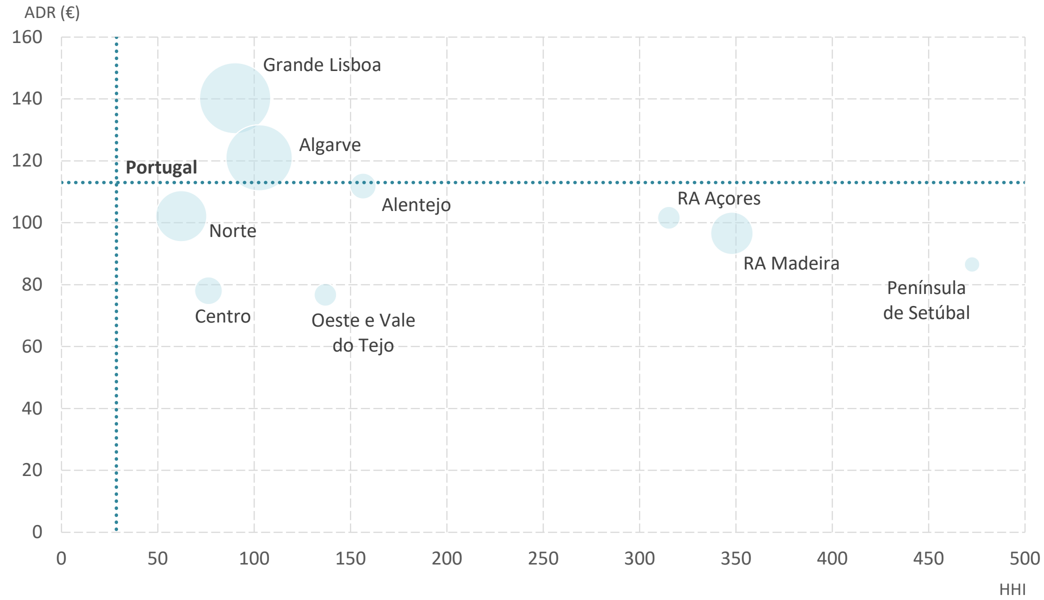
Figure 6. **Herfindahl–Hirschman Index (HHI) and number of tourist accommodation establishments, by segment, 2013 – 2023**



Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodation

On a regional level, the HHI reached its highest values in Península de Setúbal (472.6), RA Madeira (347.9), and RA Açores (315.2), in 2023. The lowest values occurred in Norte (62.1), Centro (76.3) and Grande Lisboa (90.1).

Figure 7. Herfindahl–Hirschman Index (HHI) and average daily rate (ADR), by NUTS II region, 2023



NOTE: The size of the bubbles represents the total revenue of tourist accommodation establishments in the NUTS II region.

Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodation

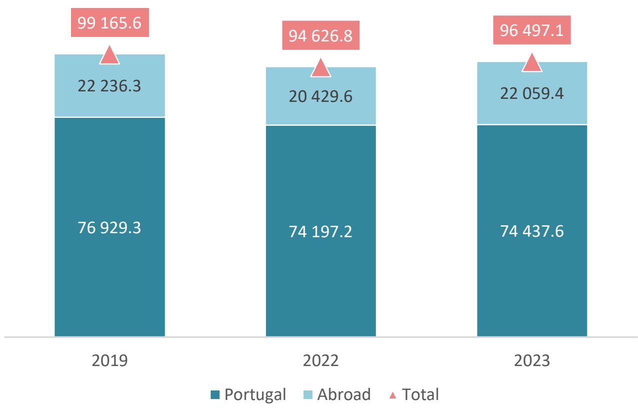
Tourist trips abroad taken by residents hit an all-time high in 2023

In 2023, 51.7% of the resident population in Portugal made at least one tourist trip (results of the **Travel Survey of Residents**), which represented an increase of 4.0 p.p. compared to 2022 (431.9 thousand more tourists), corresponding to 5.3 million individuals, still 2.1% below the 2019 total.

Tourist trips taken by residents amounted to 23.7 million, reflecting a year-on-year rate of change of 4.6%, but still below the 2019 figures (-3.2%). Domestic trips increased by 2.4% (-4.3% compared to 2019), reaching 20.4 million (86.4% of the total, 88.3% in 2022 and 87.3% in 2019). Trips abroad became more significant (13.6%, +1.9 p.p. above the 2022 figure, +1.0 p.p. compared to 2019), reaching 3.2 million in 2023 (+21.5%, +4.1% compared to 2019).

Tourist trips taken by residents generated more than 96.5 million overnight stays (+2.0% compared to 2022, -2.7% compared to 2019), with the majority occurring in Portugal (77.1% of the total, 78.4% in 2022 and 77.6% in 2019). Overnight stays spent in Portugal increased by 0.3%, while those abroad increased by 8.0%, approaching 2019 levels (-3.2% and -0.8%, respectively).

Figure 8. Residents' overnight stays by destination, 2019-2023



Source: Statistics Portugal, Travel Survey of Residents

Free accommodation provided by relatives or friends remained the most used means of accommodation concerning overnight stays spent by residents, accounting for 39.6 million overnight stays (41.0% of the total, +1.5 p.p. compared to the previous year and +2.4 p.p. compared to 2019). For domestic trips, this type of accommodation prevailed (44.9% of overnight stays, +3.2 p.p. compared to 2022 and +3.3 p.p. compared to 2019), while when travelling abroad, *hotels and similar establishments* were preferred by residents (53.2% of overnight stays, -1.1 p.p. compared to 2022, -0.5 p.p. compared to 2019).

In 2023, the average expenditure per tourist on each trip increased by 4.3% compared to 2022, standing at EUR 242.4 (+23.9% compared to 2019). For domestic trips, residents spent an average of EUR 164.3 per tourist/trip, +EUR 1.1 than in 2022 and +EUR 31.3 compared to 2019. When travelling abroad, average spending per tourist/trip fell by 2.1% in 2023 (+17.5% compared to 2019) to EUR 736.6.

EXPLANATORY NOTES

CONCEPTS

Guest – Individual that spends at least one overnight stay in a tourist accommodation establishment.

Overnight stay – Time spent by an individual between midday and midday of the following day.

Average stay – Relation between the number of overnight stays and the number of guests that originated those overnight stays during the reference period.

Net bed occupancy rate – corresponds to the relation between the number of overnight stays and the number of available beds, in the reference period, counting two beds for each double bed.

Total revenue – revenue from the activity of tourist accommodation establishments: room renting, food and beverage, and others related to the activity itself (assignment of spaces, laundry, tobacco, communications, etc.).

Revenue from accommodation – revenue from overnight stays spent by guests in all tourist accommodation establishments.

RevPAR – Revenue per available room, measured by the relation between the revenue from accommodation and the number of available rooms, in the reference period.

ADR – Average daily rate, measured by the relation between the revenue from accommodation and the number of occupied rooms in the reference period.

Herfindahl-Hirschman Index (HHI) – an indicator that allows competition to be assessed when concentration is the result of an uneven distribution of market shares or a small number of companies in the market. This index is calculated by summing the squares of the individual market shares of all the participants in a given market. The HHI ranges from approximately zero (in a market with a large number of companies, all of which have a similar market share) to 10,000 (in which case there is a pure monopoly). A low degree of concentration means that the sector is closer to a scenario of perfect competition, in which many companies of more or less equal size share the market. Increases in the HHI generally indicate a decrease in competition and an increase in market power, while decreases indicate the opposite.

Hotels and similar – Includes hotels, apartment hotels, "pousadas", "quintas da Madeira", tourist apartments, and tourist villages.

Local accommodation – Establishments that provide temporary accommodation services for remuneration but do not meet the requirements to be considered tourist facilities, and may take the form of guest houses, apartments, and lodging establishments (including hostels). Note: Includes pensions, motels, and inns previously classified as other tourist accommodations. Only local accommodation establishments with 10 or more beds are considered according to the statistical threshold set in EU Regulation 692/2011.

Rural tourist – Establishments that provide accommodation services to tourists in rural areas, providing an adequate set of facilities, structures, equipment, and complementary services, preserving, and enhancing the architectural, historical, and natural legacies of the respective region.

Lodging tourist – Establishments of a family nature, located in private real estate, namely palaces and mansions, depending on their architectural, historical, or artistic value, both in rural and urban areas.

Quinta da Madeira – Establishment located in one or more preexisting buildings, with characteristics and architectural, patrimonial, and cultural value alluding to the historical past of Madeira.

Campsites –A collective, fenced-off facility for tents, caravans, trailers, and mobile homes.

Holiday camp – A holiday complex with appropriate facilities for providing free or low-cost holidays, usually as a social service by public or private entities.

Youth hostel – A non-profit establishment providing accommodation for young people or small groups of young people.

Seasonality rate – an indicator that makes it possible to assess the relative weight of tourist demand in the months with the highest demand, in relation to the annual total, measured by the number of overnight stays in the accommodation establishments registered.

Year-on-year rates of change – Comparison between the variable level in the reference period and the same period of the year before. The calculation of year-on-year rates of change for the main indicators is based on values in units, although in this press release, they are visible only in thousands.

Usual living environment - Environment in the proximity of an individual's residence, concerning its working and studying places, as well as other places frequently visited. Distance and frequency are two closely related dimensions to this concept and include the places located near the place of residence, regardless of how often visited, and the places located at a considerable distance from the place of residence (including those in a foreign country), frequently visited (once or several times per week on average) on a routine basis.

One individual has only one usual living environment, with the concept applied to both levels of domestic tourism and international tourism.

Visitor - A person who travels to a place outside his/her habitual environment, for a period of less than 12 months, whose main motive is other than the exercise of an activity remunerated from within the place visited. There are two categories of visitors: same-day visitors and tourists.

Tourist - Traveller staying at least one night in a private or collective accommodation site in a particular place, regardless of the motivation to travel.

Tourism trip - A trip to one or multiple tourist destinations, including the returning trip to the starting point and covering the whole period during which an individual remains outside his usual living environment.

Total gross monthly remuneration - The total gross monthly remuneration corresponds to the total gross remuneration (before tax and Social Security deductions) paid by the company, subject to IRS withholding tax and Social Security deductions. Therefore, the values disclosed in this press release, only consider the remunerations subject to taxation, i.e., subject to IRS withholding and discount for SS or CGA. Therefore, amounts such as, for example, meal allowances up to the value of 5.20 Euros (from October 2022 onwards) or 7.63 Euros, if paid in cash or meal card, are excluded. It includes all the components of the variable remuneration nature.

Main sources of primary information: Source: Statistics Portugal, Survey on guests stays in hotel establishments and other accommodations, Survey on guests stays in holiday camps and youth hostels, Survey on guests stays in camping sites survey.

Further statistical information on Tourism can be found on the [Statistics Portugal website]