



28 February 2025
TOURIST ACTIVITY
January 2025 – Flash statistics

TOURISM ACTIVITY STARTS 2025 WITH AN ACCELERATION TRAJECTORY

The **tourist accommodation sector**¹ accounted for 1.6 million guests (+8.3%)² and 3.7 million overnight stays (+6.3%) in **January 2025**, amounting to EUR 262.0 million in total revenue and EUR 188.9 million in revenue from accommodation (+13.8% and +14.2%, respectively).

Overnight stays by residents increased by 11.3% (-0.2% in December), amounting to 1.3 million, and those by non-residents grew by 3.8% (+4.4% in December 2024), totalling 2.4 million.

Among the top 10 inbound markets in terms of overnight stays in January, the Polish stood out with the largest increase (+16.6%).

The revenue per available room (RevPAR) stood at EUR 33.2 (+10.0%) and the average daily rate (ADR) amounted to EUR 89.3 (+7.3%).

With the release of the data for January 2025, **Statistics Portugal starts publishing a single monthly press release, within 30 days, covering all the usual monthly indicators** (guests; overnight stays, broken down by residents and non-residents and by main countries; occupancy rates; revenues; RevPAR and ADR; the press release will also include information on all types of accommodation establishments (including camping and holiday camps and youth hostels)).

Figure 1. Monthly overview of the activity of tourist accommodation establishments, January 2025



¹ Monthly series that include three accommodation segments: hotel establishments (hotels, apartment hotels, tourist apartments, tourist villages, pousadas, and quintas in Madeira), local accommodation with 10 or more beds (following the statistical threshold laid down in EU Regulation 692/2011) and rural and lodging tourism.

² Unless otherwise stated, the rates of change shown in this press release correspond to year-on-year rates of change, compared to the same period in the previous year.

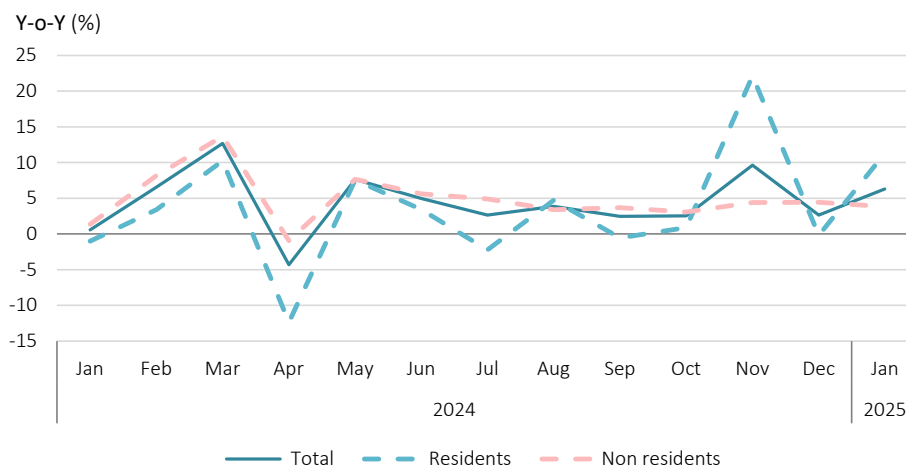


Overnight stays by residents increased by 11.3%

In **January 2025**, the tourist accommodation sector recorded 1.6 million guests and 3.7 million overnight stays, corresponding to 8.3% and 6.3% growth, respectively (+3.4% and +2.6% in December 2024, in the same order).

Overnight stays by residents totalled 1.3 million, having grown by 11.3% (-0.2% in December). External markets increased by 3.8% (+4.4% in December), totalling 2.4 million overnight stays.

Figure 2. Overnight stays spent in tourism accommodation establishments, Jan. 2024 - Jan. 2025
Year-on-year rates of change



Poland stood out with a 16.6% growth in January

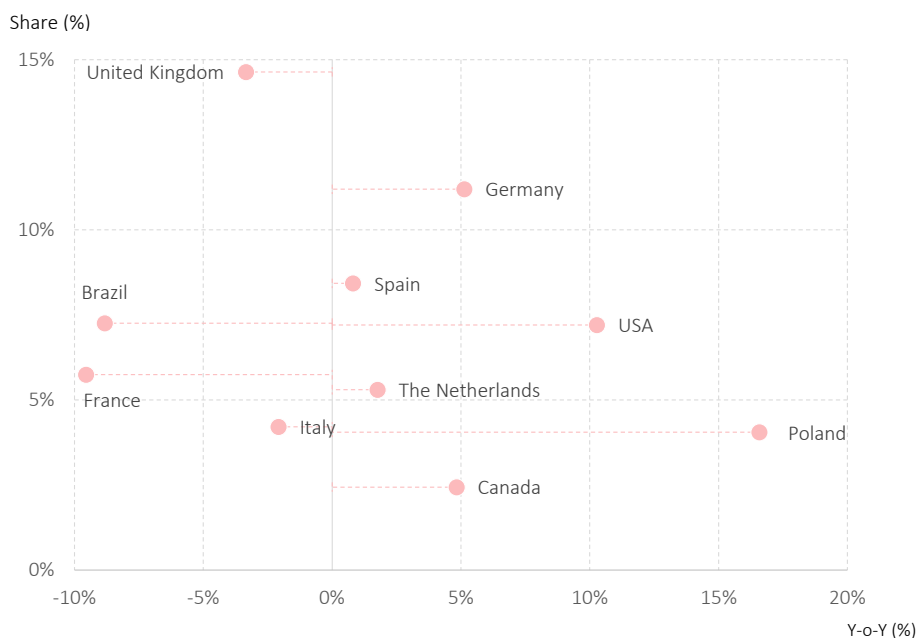
The 10 most important inbound markets accounted for 70.5% of total non-resident overnight stays in January, with the British continuing to hold the largest share (14.6% of total non-resident overnight stays in January), despite a 3.3% decrease from the same month last year.

The German market, the second most important inbound market in January (11.2% of the total), grew by 5.1%. The Spanish market followed, ranking third (8.4% share), with a 0.8% growth.

Among the 10 most important inbound markets in January, the Polish recorded the largest growth (+16.6%), followed by the United States (+10.3%). Conversely, the decreases in the French (-9.6%) and Brazilian (-8.8%) markets stood out.



Figure 3. Overnight stays in tourist accommodation establishments, by main (10) inbound markets, Jan. 2025
Year-on-year rates of change



Overnight stays increased in all regions

In January, overnight stays increased in all regions, with the highest growth occurring in Península de Setúbal (+14.4%) and Alentejo (+11.4%). There was a less significant growth in Algarve (+1.1%).

Overnight stays by residents increased in all regions, more so in RA Madeira (+35.9%) and Algarve (+19.3%).

Overnight stays by non-residents grew in most regions, more significantly in Península de Setúbal (+25.2%). Algarve and Centro were the only regions to record decreases (-3.3% and -2.9% respectively).

Table 1. Overnight stays in tourist accommodation establishments, by NUTS II regions, Jan. 2025

NUTS II	Total		Residents		Non residents	
	Overnight stays (10 ³)	Y-oY rate of change (%)	Overnight stays (10 ³)	Y-oY rate of change (%)	Overnight stays (10 ³)	Y-oY rate of change (%)
Portugal	3 670.7	6.3	1 270.0	11.3	2 400.7	3.8
Norte	679.2	7.6	312.4	9.9	366.8	5.7
Centro	280.4	6.1	216.5	9.1	63.9	-2.9
Oeste e Vale do Tejo	135.4	13.9	82.1	4.7	53.3	2.8
Grande Lisboa	1071.2	5.5	240.1	6.3	831.1	5.3
Península de Setúbal	76.7	14.4	45.1	7.9	31.6	25.2
Alentejo	129.3	11.4	91.8	12.6	37.5	8.5
Algarve	569.7	1.1	132.1	19.3	437.6	-3.3
RA Açores	98.3	10.2	57.0	9.8	41.4	10.9
RA Madeira	630.5	9.3	93.1	35.9	537.4	5.7



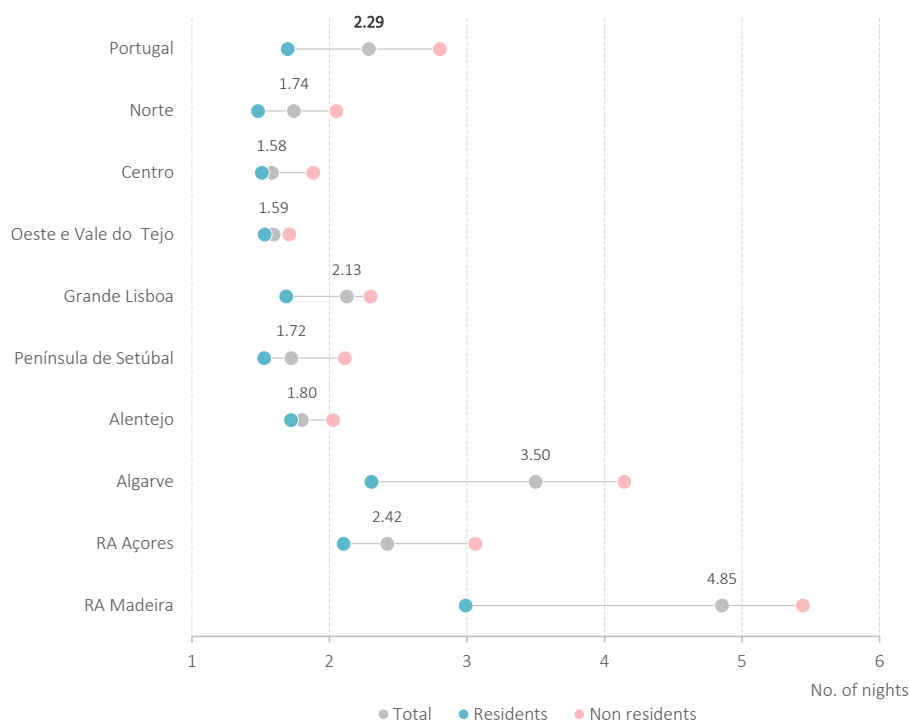
Average stay continued to decline in January, reflecting shorter stays by non-residents

In January, the average stay in tourist accommodation establishments (2.29 nights) continued to decline (-1.9%, after -0.8% in December). The highest values for this indicator continued to be recorded in RA Madeira (4.85 nights) and Algarve (3.50 nights), while the shortest stays were recorded in Centro (1.58 nights) and Oeste e Vale do Tejo (1.59 nights).

In January, the average stay of residents (1.70 nights) increased by 1.1%, while that of non-residents (2.80 nights) decreased by 2.8%.

RA Madeira recorded the longest average stay for both non-residents (5.44 nights) and residents (2.99 nights).

Figure 4. Average stay in tourist accommodation establishments, by NUTS II regions, Jan. 2025

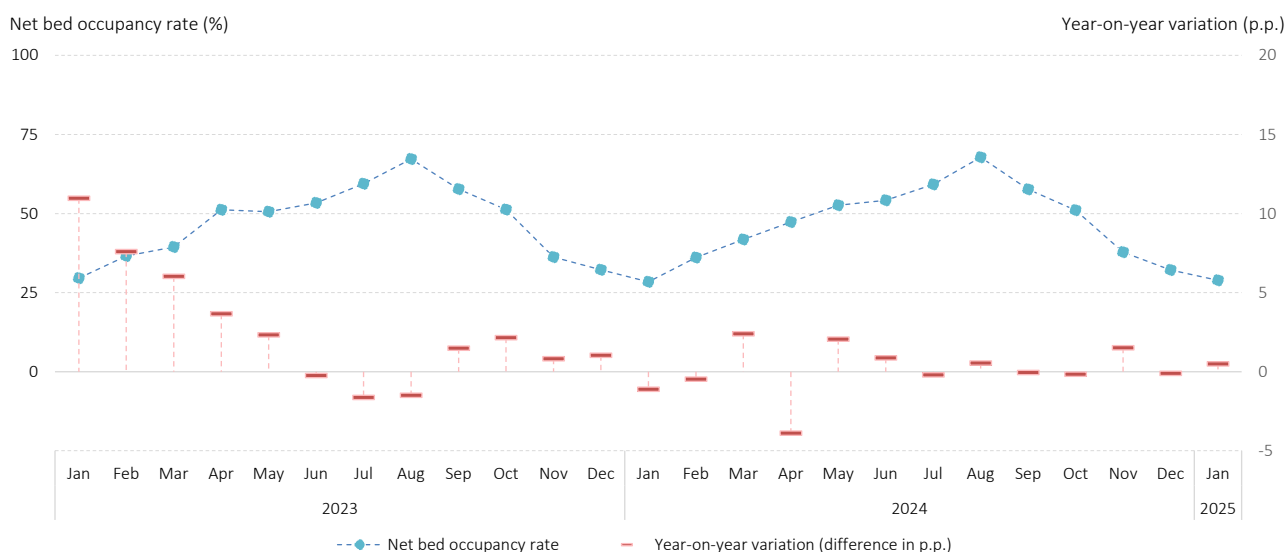




Net occupancy rates increased slightly in January

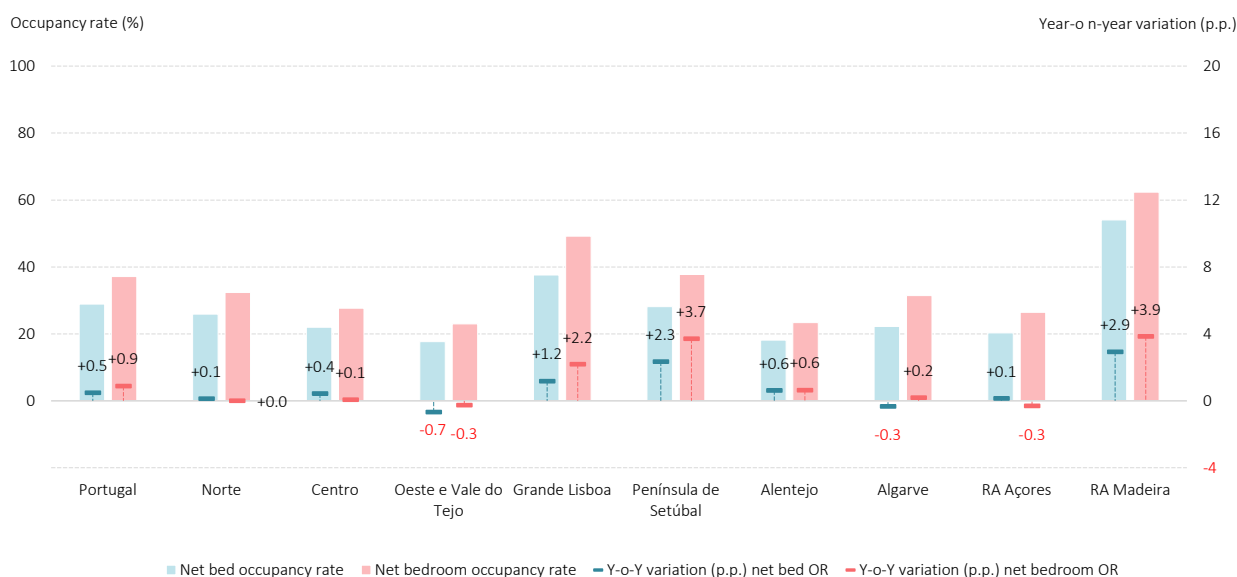
The net bed occupancy rate in tourist accommodation establishments (28.9%) increased in January (+0.5 p.p., after -0.1 p.p. in December). The net bedroom occupancy rate (37.2%) also grew, +0.9 p.p. (unchanged in December).

Figure 5. Net bed occupancy rate in tourist accommodation establishments, Jan 2023 – Jan. 2025



The largest increases in the net bed occupancy rate occurred in RA Madeira (+2.9 p.p.) and Península de Setúbal (+2.3 p.p.). Oeste e Vale do Tejo and Algarve recorded decreases in this indicator (-0.7 p.p. and 0.3 p.p., respectively). The highest bed occupancy rates were recorded in RA Madeira (54.1%), followed by Grande Lisboa (37.6%), while the lowest were in Oeste e Vale do Tejo (17.7%) and Alentejo (18.2%).

Figure 6. Net bed and bedroom occupancy rates (OR) in tourist accommodation establishments, Jan. 2025

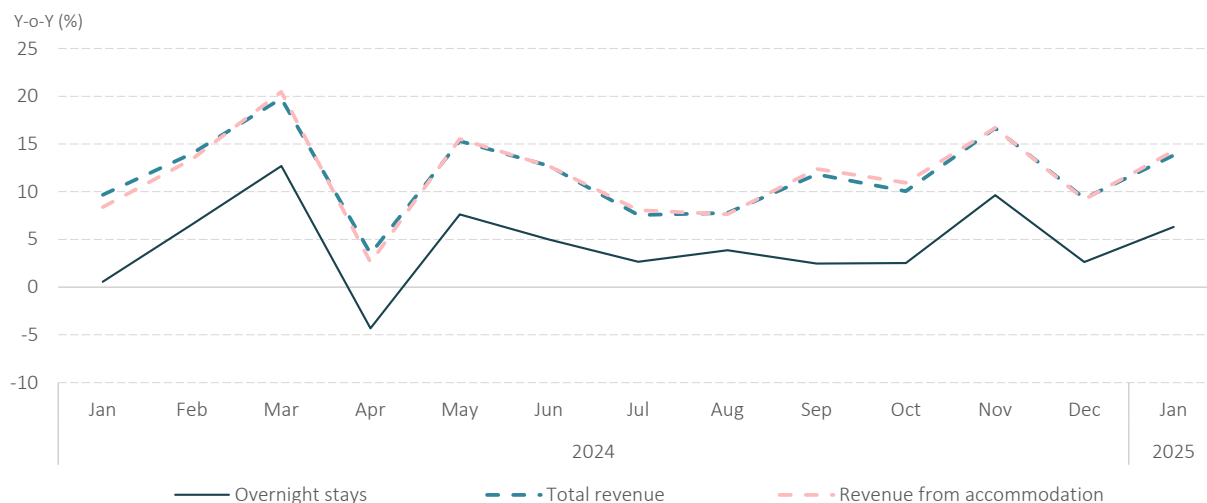




Revenue growth accelerated in January

In January, total revenue reached EUR 262.0 million and revenue from accommodation amounted to EUR 188.9 million, reflecting increases of 13.8% and 14.2%, respectively (+9.3% and +9.2% respectively in December).

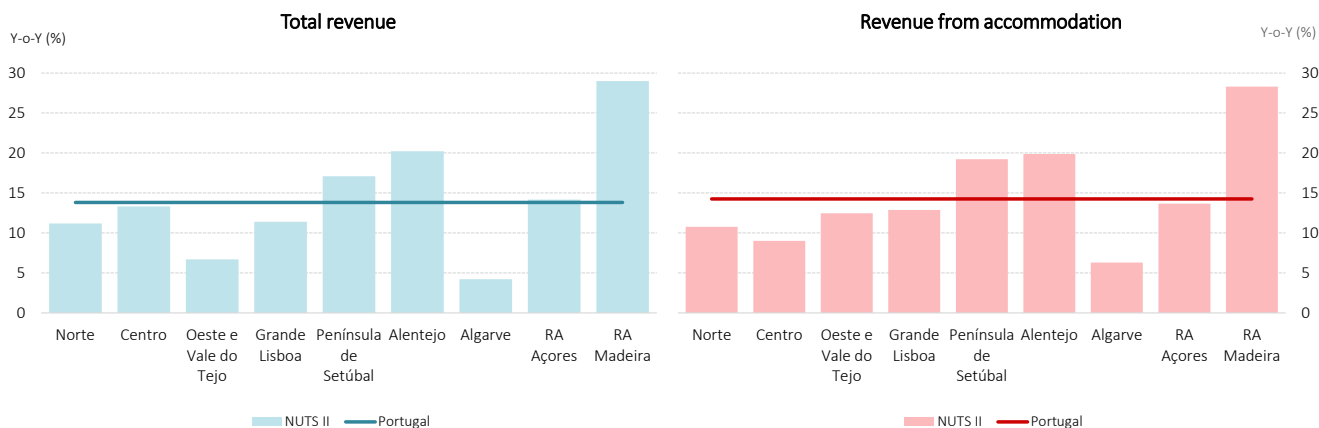
Figure 7. Revenue in tourist accommodation establishments, Year-on-year rate of change, Jan. 2024 – Jan. 2025



Grande Lisboa was the region contributing the most to overall revenue (35.1% of total revenue and 37.2% of revenue from accommodation), followed by RA Madeira (19.1% and 18.1%, respectively) and Norte (16.4% and 16.5%, in the same order).

All regions recorded revenue growth, with the largest increases occurring in RA Madeira (+29.0% in total revenue and +28.3% in revenue from accommodation) and Alentejo (+20.2% and +19.9%, respectively).

Figure 8. Total revenue and revenue from accommodation in tourist accommodation establishments, by NUTS II regions, Jan. 2025
Year-on-year rate of change

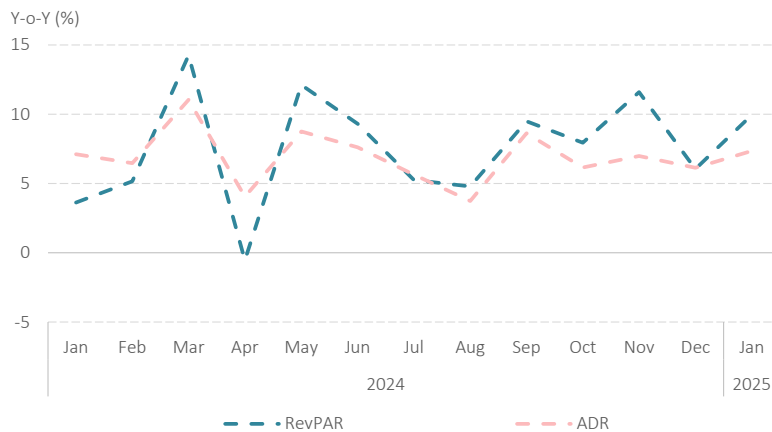




RevPAR and ADR increased in all regions

Considering all tourist accommodation establishments, the revenue per available room (RevPAR) totalled EUR 33.2 in January, reflecting an increase of 10.0% (+6.0% in December). The average daily rate (ADR) totalled EUR 89.3 (+7.3%, after +6.1% in December).

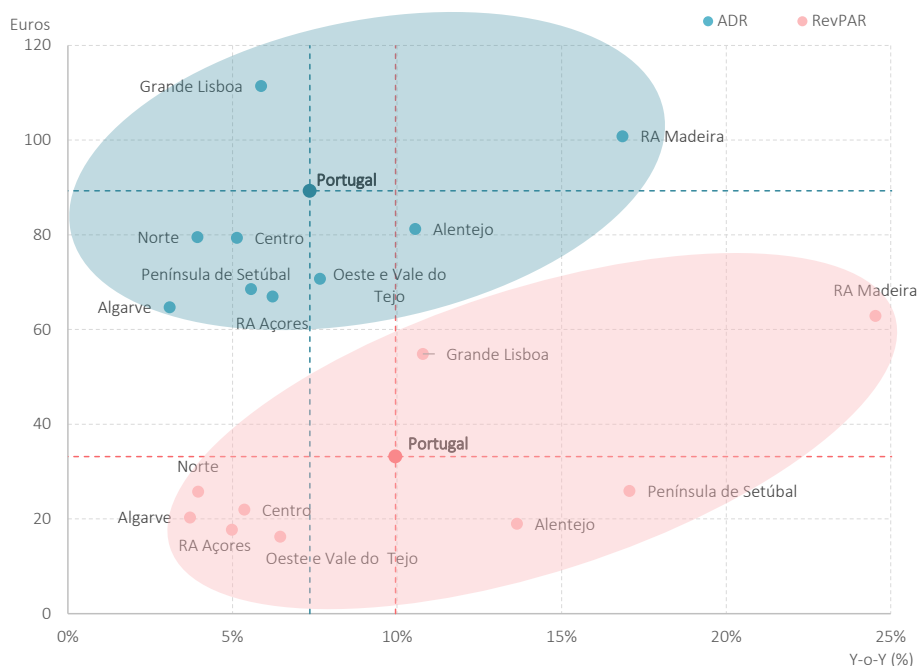
Figure 9. RevPAR and ADR in tourist accommodation establishments, by month, Jan. 2024 – Jan. 2025



The highest RevPAR values were recorded in RA Madeira (EUR 62.9) and Grande Lisboa (EUR 54.8). The largest increases were recorded in RA Madeira (+24.5%) and Península of Setúbal (+17.1%)

Grande Lisboa stood out with the highest ADR (EUR 111.4), followed by RA Madeira (EUR 100.8). All regions recorded an increase in this indicator, with the most significant increases occurring in RA Madeira (+16.8%) and Alentejo (+10.5%).

Figure 10. RevPAR and ADR in tourist accommodation establishments, by NUTS II regions, Jan. 2025





Albufeira recorded a 9.8% decrease in the first month of 2025

The municipality of Lisboa accounted for 24.3% of all overnight stays, with a total of 892.8 thousand (+5.2%, after +2.2% in December). Overnight stays by residents increased by 5.7% and those by non-residents grew by 5.1%. This municipality accounted for 30.8% of all overnight stays by non-residents in January.

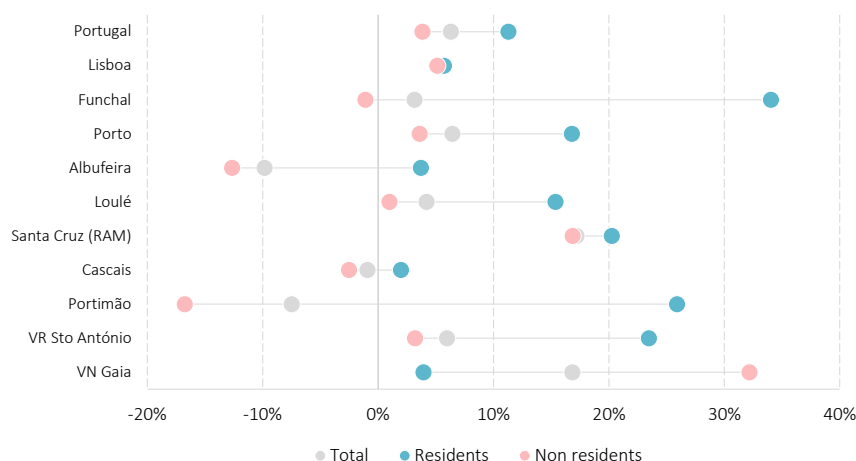
Funchal was the second municipality with the highest number of overnight stays (431.9 thousand overnight stays, 11.8% share) and grew by 3.1% (+5.2% in December). Overnight stays by residents increased significantly (+34.0%), while those by non-residents decreased by 1.1%. This municipality accounted for 15.2% of all overnight stays by non-residents in January.

In Porto, 319.2 thousand overnight stays were registered (8.7% of the total), showing an increase of 6.4% (+4.6% in December), with contributions from overnight stays by both residents (+16.8%) and non-residents (+3.6%).

Among the top 10 municipalities, Santa Cruz, in RA Madeira (2.0% of the total), with an increase of 17.2% (+20.2% for residents and +16.8% for non-residents), and Vila Nova de Gaia (1.5% of the total), with an increase of 16.8% (+3.9% for residents and +32.2% for non-residents), both stood out. Albufeira and Portimão recorded the largest January decreases (-9.8% and -7.5, respectively).

Regarding overnight stays by residents, the municipalities of Portimão and Vila Real de Santo António are also worth a remark for their significant growth in January (+25.9% and +23.4%, respectively). In these municipalities, overnight stays by non-residents fell by 16.8% in Portimão and increased by 3.2% in Vila Real de Santo António.

Figure 11. Overnight stays by residents and non-residents in tourist accommodation establishments, by main municipalities, Jan. 2025 - year-on-year rate of change





Accommodation Activity – overview

In January 2025, considering all means of accommodation (tourist accommodation establishments, camping and holiday camps, and youth hostels), there were 1.7 million guests and 4.0 million overnight stays (+8.2% and +6.3%), respectively). Overnight stays spent by residents increased by 11.0% and those by non-residents grew by 4.0%. In all establishments, the average stay (2.36 nights) decreased by 1.8% (+0.7% regarding residents and -2.4% considering non-residents).

Table 2. Main indicators of accommodation activity, Jan. 2025

	Unit	Total		Residents		Non residents	
		Jan-25	Y-o-y change rate (%)	Jan-25	Y-o-y change rate (%)	Jan-25	Y-o-y change rate (%)
Guests							
Total	10 ³	1 681.8 ▲	8.2	786.6 ▲	10.2	895.2 ▲	6.5
Tourist accommodation establishments	"	1 605.7▲	8.3	748.9▲	10.1	856.8▲	6.8
Camping sites	"	65.9▲	8.8	30.3▲	19.4	35.6▲	1.2
Holiday camps and youth hostels	"	10.1▼	-8.2	7.3▼	-4.9	2.8▼	-15.8
Overnight stays							
Total	10 ³	3 961.3 ▲	6.3	1 379.4 ▲	11.0	2 581.9 ▲	4.0
Tourist accommodation establishments	"	3 670.7▲	6.3	1 270.0▲	11.3	2 400.7▲	3.8
Camping sites	"	263.2▲	7.2	89.9▲	5.4	173.3▲	8.2
Holiday camps and youth hostels	"	27.4▲	0.3	19.5▲	19.7	7.9▼	-28.4
Average stay							
Total	no. Nights	2.36 ▼	-1.8	1.75 ▲	0.7	2.88 ▼	-2.4
Tourist accommodation establishments	"	2.29▼	-1.9	1.70▲	1.1	2.80▼	-2.8
Camping sites	"	3.99▼	-1.5	2.97▼	-11.7	4.87▲	6.9
Holiday camps and youth hostels	"	2.70▲	9.2	2.66▲	25.8	2.80▼	-15.1

Overnight stays increased in all tourist accommodation establishments

In January, tourist accommodation establishments recorded 1.6 million guests (+8.3%) and 3.7 million overnight stays (+6.3%). The average stay (2.29 nights) decreased by 1.9%. Overnight stays by residents increased by 11.3% and those by non-residents grew by 3.8%.

Camping sites recorded 65.9 thousand campers and 263.2 thousand overnight stays, corresponding to rates of change of +8.8% in guests and +7.2% in overnight stays (+5.4% concerning residents and +8.2% considering non-residents), with the average stay (3.99 nights) decreasing by 1.5%.

Holiday camps and youth hostels welcomed 10.1 thousand guests (-8.2%), leading to 27.4 thousand overnight stays (+0.3%), with the average stay (2.70 nights) increasing by 9.2%. Overnight stays by residents increased by 19.7% and those by non-residents decreased by 28.4%.



EXPLANATORY NOTES

As of February 2025, with the release of data for January 2025, Statistics Portugal will release a single 30-day monthly press release with all the usual monthly indicators (guests; overnight stays, broken down by residents and non-residents and main countries; occupancy rates; revenue; RevPAR and ADR; information on all means of accommodation (including camping and holiday camps and youth hostels). Additionally, a quarterly press release will be published, analysing the quarter's data in greater detail than the monthly press release (for example, the segments and types of tourist accommodation establishments and an analysis of other indicators of the activity of tourist accommodation establishments).

The sources used in this press release are:

- The Survey on guest stays in hotel establishments and other accommodations,
- The Survey on guest stays in camping sites,
- The Survey on guest stays in holiday camps and youth hostels.

Data made available in this press release relates to establishments operating in each reference period, considering:

- 2024 – January to December: provisional results; 2025 – January: preliminary results.

In between preliminary, provisional, and final data, results are revised due to definitive answers instead of provisional and mainly due to the replacement of non-response estimates with effective responses. These effective responses include situations of suspended activity (seasonal, temporarily for other reasons, or definitive) not duly reported, resulting in the substitution of estimates by a null result, a situation with higher occurrence during the low season.

The degree of revision, measured by the difference, in percentage points, between the year-on-year rates of change of the provisional and preliminary results for the reference month of **December**, is as follows:

	Guests	Overnight stays	Total revenue	Revenue from accommodation
December 2024	-0.2 p.p.	-0.3 p.p.	+0.1 p.p.	-0.1 p.p.

From the reference month of January 2024, in response to the changes resulting from **the adoption of the new Nomenclature of Territorial Units for Statistics - NUTS 2024**, following the [European Commission's Delegated Regulation \(EU\) 2023/674 of 26 December 2022](#), the press releases of tourism activity will be based on the new NUTS configuration. In this new configuration, Portugal's 308 municipalities are now grouped into 26 NUTS III territorial units, which in turn are grouped into **9 NUTS II territorial units**, creating three statistical regions at this level: Península de Setúbal, Grande Lisboa, and Oeste e vale do Tejo. The new NUTS 2024 also abolishes Área Metropolitana de Lisboa and redefines Centro and Alentejo regions.

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.

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 revenue from accommodation and the number of available rooms, in the reference period.

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

Hotels and similar – include 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.

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.

To simplify the language, the term “foreigner” might be used instead of “non-resident”.

INFORMATION MADE AVAILABLE

With this press release, in addition to the files attached to the press itself, the following indicators are made available on Statistics Portugal's website:

[Guests \(No.\) in tourist accommodation establishments by Place of residence \(Portugal, Estrangeiro\); Monthly](#)

[Nights \(No.\) in tourist accommodation establishments by Place of residence \(Portugal, Estrangeiro\); Monthly](#)



Indicators according to the previous version of the NUTS classification (NUTS 2013):

[Guests \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Segment \(tourist accommodation establishment\); Monthly](#)

[Nights \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Segment \(tourist accommodation establishment\); Monthly](#)

[Total incomes \(€\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Type \(tourist accommodation establishment\); Monthly](#)

[Lodging incomes \(€\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Type \(tourist accommodation establishment\); Monthly](#)

Indicators according to the new version of the NUTS classification (NUTS 2024):

[Guests \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2024\) and Type \(tourist accommodation establishment\); Monthly](#)

[Nights \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2024\) and Type \(tourist accommodation establishment\); Monthly](#)

[Total incomes \(€\) in tourist accommodation establishments by Geographic localization \(NUTS - 2024\) and Type \(tourist accommodation establishment\); Monthly](#)

[Lodging incomes \(€\) in tourist accommodation establishments by Geographic localization \(NUTS - 2024\) and Type \(tourist accommodation establishment\); Monthly](#)

Indicators to be released on **14th March 2025**

Indicators according to the previous version of the NUTS classification (NUTS 2013):

[Guests \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Segment \(tourist accommodation establishment\); Monthly](#)

[Nights \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Segment \(tourist accommodation establishment\); Monthly](#)

Indicators according to the new version of the NUTS classification (NUTS 2024):

[Guests \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2024\) and Segment \(tourist accommodation establishment\); Monthly](#)

[Nights \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2024\) and Segment \(tourist accommodation establishment\); Monthly](#)

Further statistical information on Tourism can be found on the [Statistics Portugal website](#).

Date of next flash statistics – 31st March 2025

Date of next quarterly press release – 15th May 2025
