

31 January 2019

Tourism Demand of Residents
3rd Quarter 2018

**Number of tourism trips of residents keep growing at a slower pace,
with a decrease in trips abroad**

In the 3rd quarter 2018, residents in Portugal took a total of 7.8 million trips, which stood for a slight 0.1% increase¹ (+2.1% in the 2nd Q; +12.1% in the 1st Q). Domestic trips grew by 0.3% (+0.1% in the 2nd Q), standing for 90.0% of the total, while the number of trips abroad declined in this period: -1.3% (following +18.1% in the 2nd Q and +14.9% in the 1st Q).

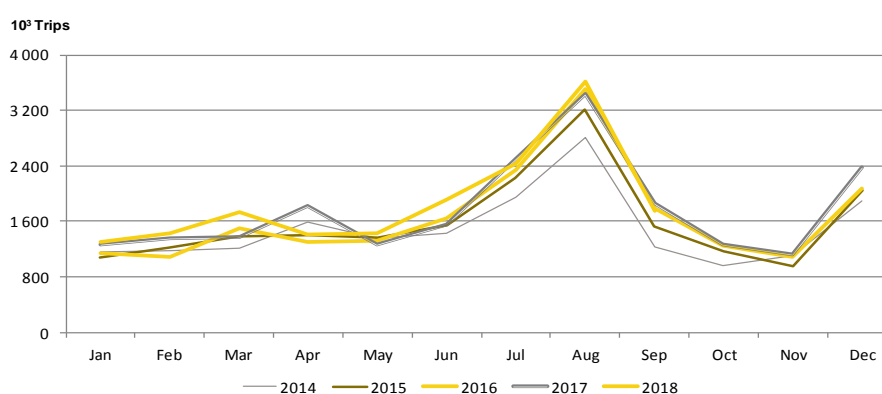
“Leisure, recreation or holidays” was the main reason to travel, corresponding to 4.8 million trips (the equivalent to 61.1% of the total, i.e. +0.8 p.p.), followed by “visit to relatives or friends” with 2.5 million trips (31.6% of the total, -1.2 p.p.). “Professional or business” trips attained 4.6% of the total (+0.8 p.p.).

“Hotel and similar establishments”, the choice for 20.4% of the total overnight stays, became more relevant (+2.2 p.p.). Conversely, “free private accommodation” lost representativeness (-1.4 p.p.), although having been chosen for the majority (60.5%) of the total overnight stays in the 3rd quarter 2018.

“Leisure, recreation or holiday” trips grew in importance

In the 3rd quarter 2018, trips made by residents in Portugal amounted to 7.8 million, growing slightly by 0.1%, following increases of 2.1% in the 2nd Q and 12.1% in the 1st Q 2018.

Figure 1. Tourist trips of residents by month



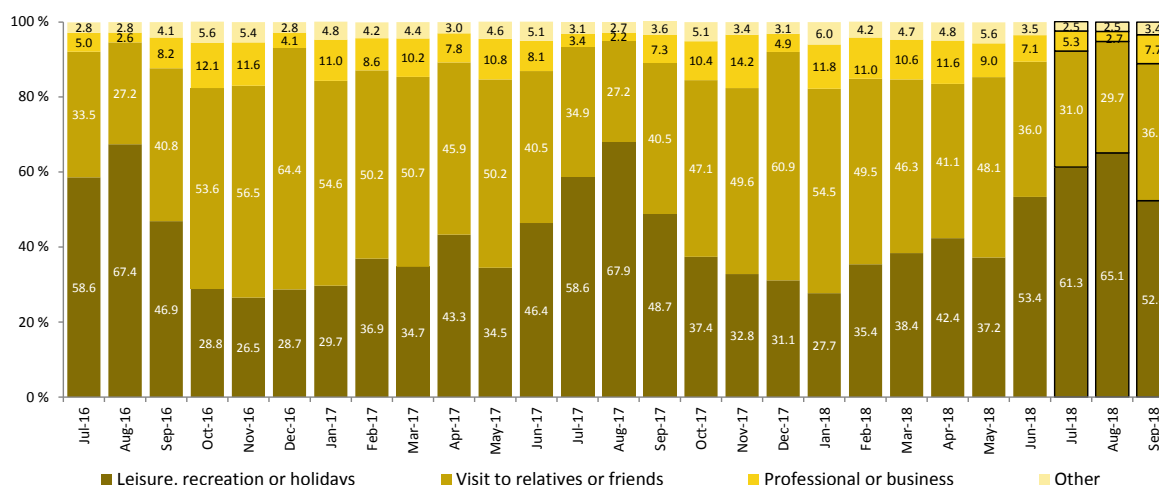
As usual in the 3rd quarter, “leisure, recreation or holidays” was the main reason to travel, corresponding to 4.8 million trips (+1.4%), the equivalent to 61.1% of the total and standing for a 0.8 p.p. increase in its weight, in relation to the same quarter of the preceding year.

¹ Unless stated otherwise, the change rates in this press release correspond to year-on-year change rates.

"Visit to relatives or friends" justified 2.5 million trips (-3.6%), losing representativeness (-1.2 p.p., corresponding to 31.6% of the total).

Trips for "professional or business" reasons (360.2 thousand) represented 4.6% of the total (+0.8 p.p.).

Figure 2. Breakdown of trips according to main purposes, by month



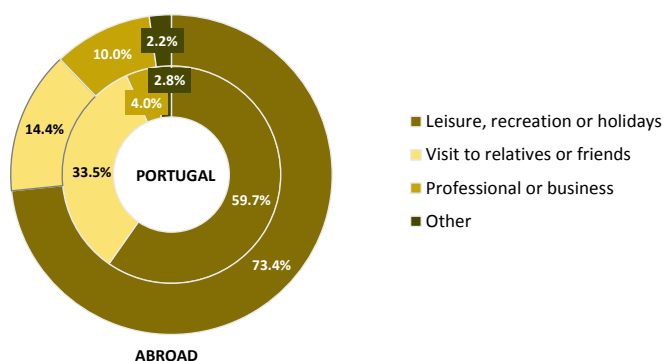
Slight increase in trips in Portugal

In the 3rd quarter 2018, domestic trips corresponded to 90.0% of all tourism trips and amounted to 7.0 million, reflecting an increase of 0.3% (+0.1% in the 2nd Q). Trips abroad totalled 778.6 thousand and decreased by 1.3% (following +18.1% in the 2nd Q), with a slight loss in representativeness (-0.1 p.p.).

In domestic trips, "leisure, recreation or holidays" was the main reason to travel (59.7%; +0.9 p.p.). "Visit to relatives or friends" in national territory motivated 33.5% of the trips (-1.5 p.p.). Trips taken for "professional or business" reasons stood for 4.0% of the total domestic trips (+1.1 p.p.).

As regards trips abroad, "leisure, recreation or holidays" as the main reason to travel ascended to 73.4% of the total (-0.3 p.p.), while "visit to relatives or friends" had a 14.4% weight (+1.1 p.p.).

Figure 3. Breakdown of trips according to purposes, by destination, 3rd Q 2018

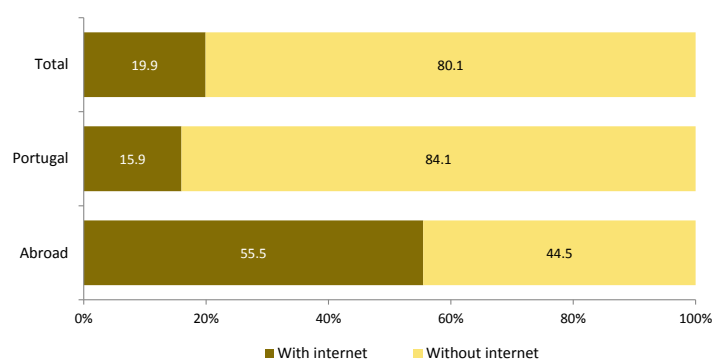


Internet use in the planning of trips has increased, particularly in trips abroad

In the 3rd quarter 2018, booking in advance was a practice in 36.0% of tourism trips (+0.9 p.p.), more so in trips abroad (88.9%, i.e. +0.3 p.p.) and 30.1% (+1.0 p.p.) in domestic trips.

The internet was used in the planning of 19.9% of tourism trips (+0.8 p.p.). The use of the internet while planning trips abroad (55.5% of the total) increased more expressively (+2.9 p.p.) comparing with domestic trips (15.9% with internet planning; +0.6 p.p.).

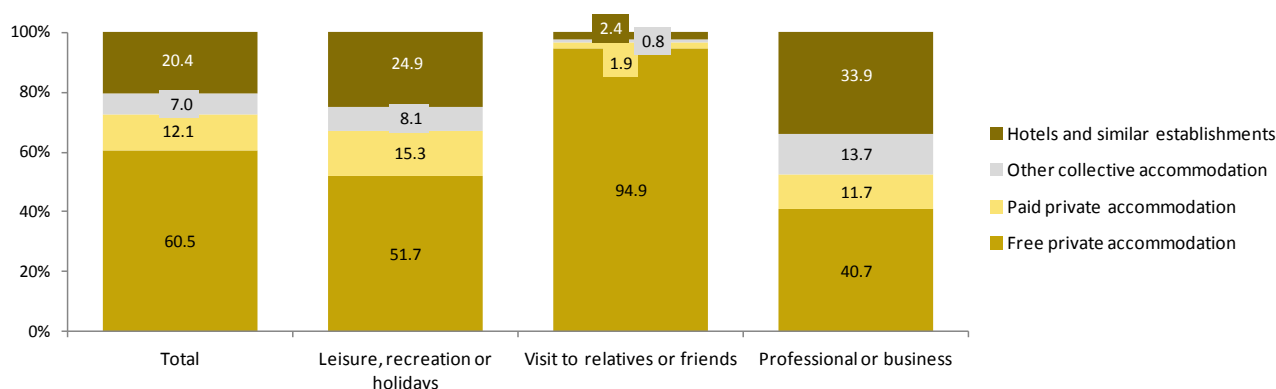
Figure 4. Breakdown of trips according to the use of internet, by destination, 3rd Q 2018



“Hotel and similar establishments” continued to grow in importance

In the 3rd quarter 2018, “hotels and similar establishments” were used in 20.4% of overnight stays, with an increase of 2.2 p.p. in its share. The use of other collective accommodation (7.0% weight) grew in importance (+1.0 p.p.). “Free private accommodation”, although remaining as the main accommodation option (60.5% of overnight stays), lost some share (-1.4 p.p.), as did “paid private accommodation” (12.1%, i.e. -1.8 p.p.).

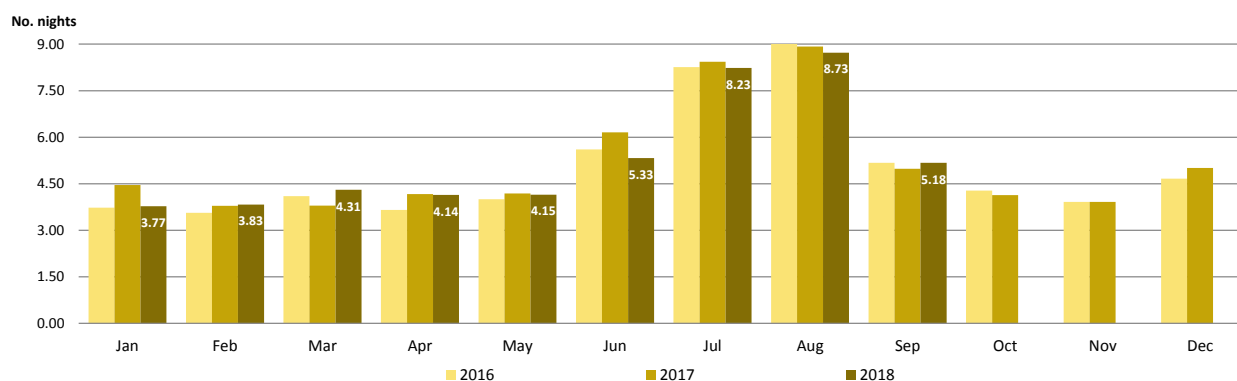
Figure 5. Breakdown of overnight stays by type of accommodation, according to main purposes, 3rd Q 2018



Number of overnight stays per tourist declined slightly

In the 3rd quarter 2018, on average, each resident tourist spent 7.81 overnight stays (-0.9%) in its tourism trips. As usual, the highest number of overnight stays by tourist occurred in August (8.73 nights), followed by July (8.23 nights). As in recent years, the number of overnight stays in September, per tourist (5.18), was lower than the number for June (5.33 nights).

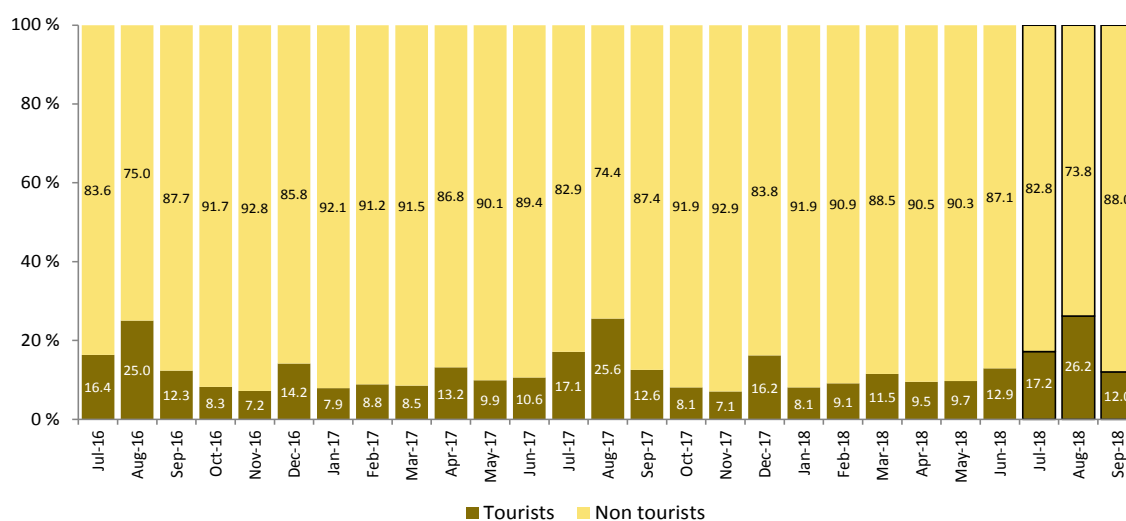
Figure 6. Overnight stays spent by tourist during trips, by month



Increase in the number of tourists

In the 3rd quarter 2018, the proportion of residents who took at least one tourist trip was 37.9% (+1.2 p.p.). In August, the proportion of residents who travelled ascended to 26.2% (+0.6 p.p.), while in July there were 17.2% resident tourists (+0.1 p.p.), a ratio that has gone down to 12.0% (-0.6 p.p.) in September.

Figure 7. Proportion of tourists and non tourists in the resident population, by month



METHODOLOGICAL NOTES

Results from the "Survey on Tourist Demand of Residents" are gathered from surveying a sample of about 5 000 housing units (12 000 individuals), with a 50% rotation in the beginning of each year, with a quarterly telephone interview.

Data for 2017 – final data.

Data for 2018 – provisional data.

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

Tourist trip – A trip to one or multiple tourist destinations, including the returning trip to the starting point and covering the whole period of time during which an individual remains outside its usual living environment.

Usual living environment – Environment in the proximity of an individual's residence, in relation to 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 of 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 on both levels of domestic tourism and international tourism.

Hotels and similar establishments – Tourist accommodation establishments whose main economic activity consists on the provision of accommodation services and other complementary or support services, with or without provision of meals, in exchange for payment.

Other collective accommodation – Establishments, places or facilities providing accommodation services to tourists mostly in exchange for payment including camping sites, holiday camps, youth hostels, collective means of transportation, working or holiday projects, amongst others.

Free private accommodation – Accommodation used by tourists consisting of a second residence or provided by relatives or friends, for free.

Paid private accommodation – Private accommodation, with or without official licensing for the provision of tourist accommodation, having available a limited number of paid independent places (rooms or housing).

Date of next Press Release: 29 April 2019