27 April 2022
TOURISM DEMAND OF RESIDENTS
4th Quarter of 2021

PROGRESSIVE APPROACH TO 2019 LEVELS CONTINUED

In **2021**, trips made by residents increased by 21.6%[1] and amounted to 17.5 million (-28.4% compared to 2019; -41.1% in 2020). Domestic trips increased by 20.2% and trips abroad grew by 48.8% (-22.7% and -67.4%, in the same order, compared to 2019; -35.7% and -78.1%, respectively, in 2020). “Free private accommodation”, despite losing expression, continued to be the main means of accommodation used (66.3%, -2.9 p.p.[2] compared to 2020), and the average number of overnight stays spent per tourist decreased by 1.5% (from 6.72 nights in 2020 to 6.62 nights in 2021).

In the **4th quarter of 2021**, residents in Portugal made 4.6 million trips, which corresponded to an increase of 96.1% (-16.5% compared to the 4th quarter of 2019; +21.3% in the 3rd quarter of 2021). Domestic trips corresponded to 91.3% of the total trips (4.2 million) increasing by 84.0% (-13.9% when compared with the 4th quarter of 2019). Trips abroad increased by 547.3% (-37.0% vis-à-vis the same period in 2019), amounting to 398.9 thousand trips, corresponding to 8.7% of total trips (5.9% in the 3rd quarter of 2021).

Significant increase in the number of trips but still below 2019 levels

In the 4th quarter of 2021, the residents in Portugal took 4.6 million trips, an increase of 96.1% year-on-year (+21.3% in the 3rd quarter of 2021). The large variation observed was due to more restrictive measures to circulation being implemented in the same period of 2020, especially in November and December. However, the figures were still below those recorded in the same quarter of 2019 (-16.5%, a period in which 5.5 million trips were made).

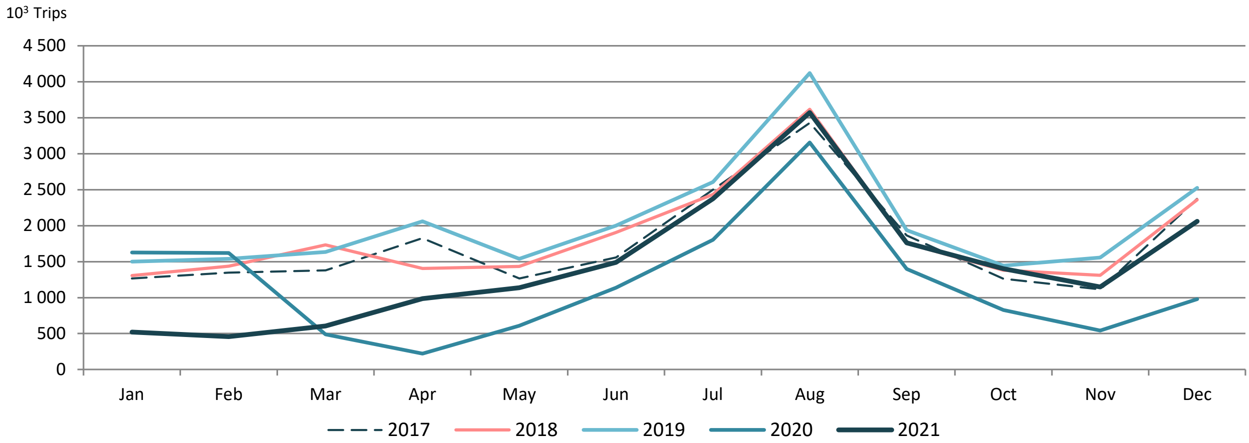
The number of trips increased in all months of the quarter: +69.0% in October, +111.8% in November, and +110.3% in December.

In 2021 as a whole (provisional results), 17.5 million trips were made (+21.6% compared to 2020; -28.4% compared to 2019).

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

[2] In the analysis of proportions, a comparison is made between corresponding periods of previous years.

Figure 1. Tourism trips of residents by month



In the **4th quarter of 2021**, domestic trips corresponded to 91.3% of all the trips (94.1% in the 3rd quarter of 2021; 88.5% in the 4th quarter of 2019), increasing by 84.0% year-on-year (-13.9% compared to the 4th quarter of 2019; +17.1% in the 3rd quarter of 2021). In a monthly analysis, the rates of change were +55.6% in October, +96.4% in November, and +100.9% in December. Tourist trips abroad increased by 547.3%, accounting for 398.9 thousand trips (-37.0% compared to 4th quarter of 2019; +180.9% in the 3rd quarter of 2021), representing 8.7% of the total (5.9% in the 3rd quarter of 2021; 11.5% in the 4th quarter of 2019), the highest proportion since the 1st quarter of 2020.

Figure 2. Tourism trips destination, by month

Unit: 10^3

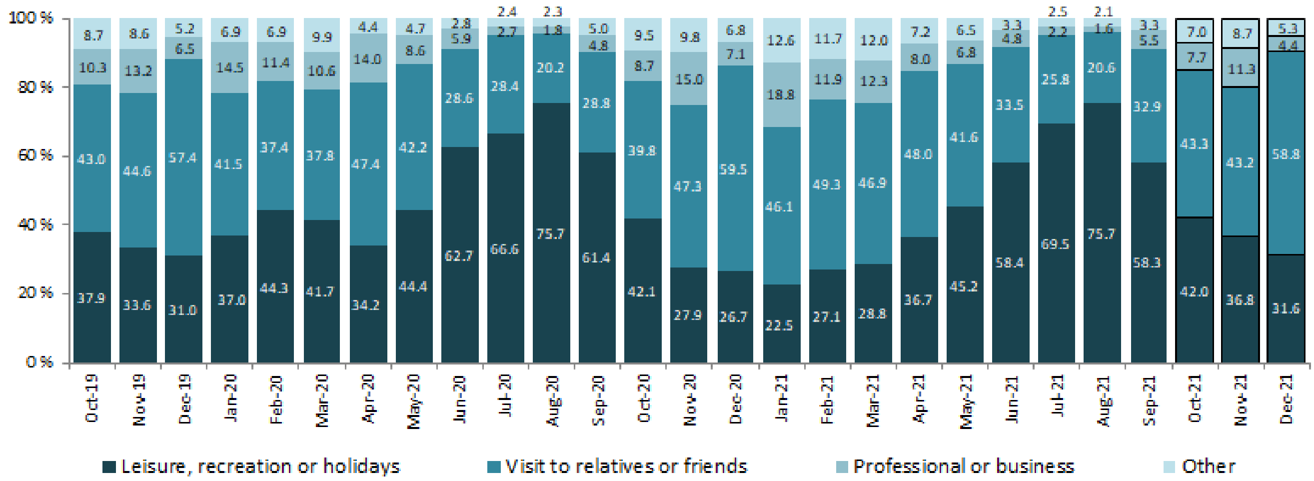
MONTH	Total (No)			Total Portugal (No)			Total Abroad (No)		
	2019	2020	2021	2019	2020	2021	2019	2020	2021
Total	**24,463**	**14,410**	**17,518**	**21,363**	**13,730**	**16,506**	**3,100**	**680**	**1,012**
January	1,501	1,627	522	1,313	1,430	494	188	198	28
February	1,539	1,620	456	1,363	1,412	445	176	208	11
March	1,634	490	607	1,422	452	600	212	38	7
April	2,060	222	987	1,739	220	976	321	3	11
May	1,539	608	1,138	1,356	607	1,109	184	0	30
June	2,001	1,137	1,491	1,677	1,127	1,420	323	9	71
July	2,607	1,803	2,374	2,304	1,765	2,272	303	38	101
August	4,122	3,155	3,573	3,595	3,080	3,391	527	74	182
September	1,939	1,398	1,761	1,705	1,349	1,590	234	49	171
October	1,443	829	1,400	1,278	805	1,252	165	24	148
November	1,555	541	1,147	1,365	527	1,036	190	14	111
December	2,524	980	2,061	2,246	956	1,922	278	23	139

The "visit to relatives or friends" was the main motivation for travel in the **4th quarter of 2021**, accounting for 2.3 million trips (+98.1%; -16.3% when compared to the 4th quarter of 2019), standing for more than half the total (50.2%; +0.5 p.p. vis-à-vis the 4th quarter of 2020). "Leisure, recreation, or holidays" as a motivation to travel corresponded to 1.7 million trips made (+118.0%; -10.3% in comparison with the 4th quarter of 2019; +20.9% in the 3rd quarter of 2021), representing 36.0% of the total (+3.6 p.p. compared to the 4th quarter of

2020). Trips for “professional or business” reasons (328.4 thousand) increased by 47.8% (-36.6% compared to 2019; +20.2% in the 3rd quarter of 2021), despite a decrease in its representativeness (7.1% of the total; 9.5% in the 4th quarter of 2020).

Considering the trips made in **2021 as a whole**, “leisure, recreation, or holidays” as a motivation to travel was associated with 52.5% of the total, corresponding to 9.2 million trips (+18.1% compared to 2020; -23.9% vis-à-vis 2019). The “visit to relatives or friends” was the reason for 36.8% of the trips (6.4 million trips, +32.2%; -30.3% compared to 2019). “Business or professional trips” represented 5.6% of the total (1.0 million trips, -2.8%; -50.9% compared to 2019).

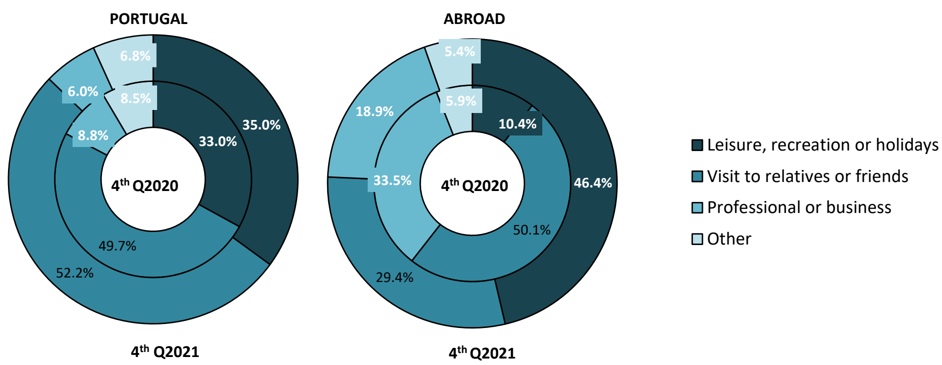
Figure 3. **Breakdown of trips according to the main purposes, by month**



"Leisure, recreation or holidays" trips increased their proportion in trips abroad

In the **4th quarter of 2021**, the “visit to relatives or friends” as a motivation to travel was associated with most domestic trips (2.2 million; weight of 52.2%) and was the second main motivation in trips abroad (117.1 thousand trips; weight 29.4%). “Leisure, recreation, or holidays” was the main reason for trips abroad (184.9 thousand trips; weight 46.4%) and the second reason for domestic trips (1.5 million trips; weight 35.0%).

Figure 4. **Breakdown of trips according to purposes, by destination**

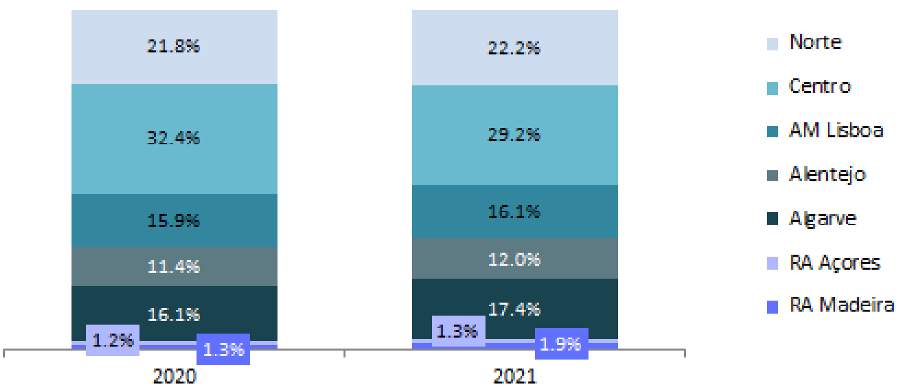


In 2021 as a whole, the number of trips abroad increased by 48.8% (-67.4% compared to 2019; -78.1% in 2020), standing for 5.8% of the total (+1.1 p.p.), mostly for "leisure, recreation, or holidays" (weight of 49.7%, +5.8 p.p.). Domestic trips increased by 20.2% (-22.7% compared to 2019; -35.7% in 2020), with "leisure, recreation, or holidays" also being the motivation associated with the highest number of trips (weight of 52.7%; -1.9 p.p.).

The Algarve strengthened its 3rd position as the main destination of domestic trips

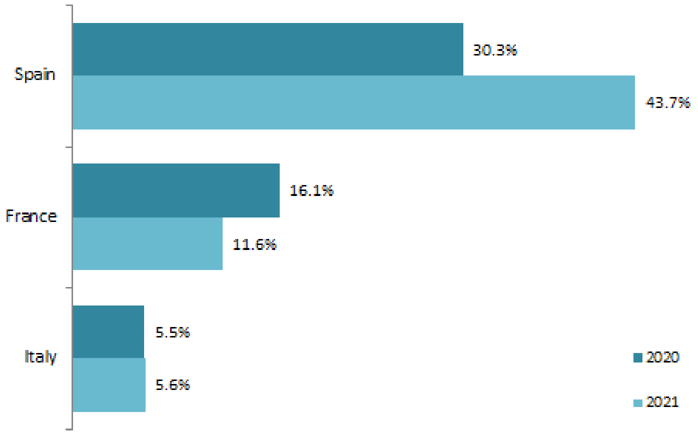
In 2021 as a whole, the Centro region remained the main destination region for domestic trips, corresponding to 29.2% of the total (-3.2 p.p. compared to 2020), followed by the Norte region (22.2% of the total; +0.4 p.p.). The Algarve was the region that became more relevant compared to the previous year (+1.4 p.p.; +3.0 p.p. in 2019), strengthening its 3rd position as the main destination of domestic trips (17.4%).

Figure 5. **Distribution of domestic trips by NUTS II**



In 2021, among the main destination countries for trips abroad, Spain and France were still 1st and 2nd, respectively, with 43.7% (+13.3 p.p.) and 11.6% (-4.5 p.p.) of trips. Italy rose to 3rd with 5.6% (+0.1 p.p.), previously taken by the United Kingdom in 2020 which dropped to 6th in 2021 (2.9%; 8.4% in 2020). Among the trips made abroad, 82.4% were destined for European Union countries (+3.0 p.p. compared to 2020).

Figure 6. The proportion of trips to the three main foreign destinations

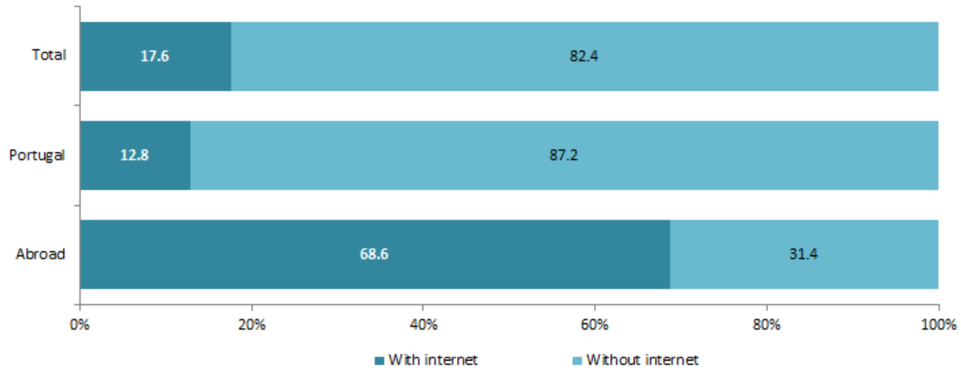


The use of the Internet to organise trips gained expression in both destinations in the quarter, but lost relevance when considering the whole year

In the **4th quarter of 2021**, 26.9% of the trips were made through the booking of services (+9.2 p.p.), a proportion that amounted to 89.6% (+18.4 p.p.) for trips abroad. In domestic trips, the booking of services was used in 20.9% of the trips (+4.7 p.p.).

The Internet was used to organize 17.6% of the trips (+8.0 p.p.), having been an option in 68.6% (+14.9 p.p.) of trips abroad and 12.8% (+4.3 p.p.) of domestic trips.

Figure 7. Breakdown of trips according to the use of the internet, by destination, 4th Q 2021

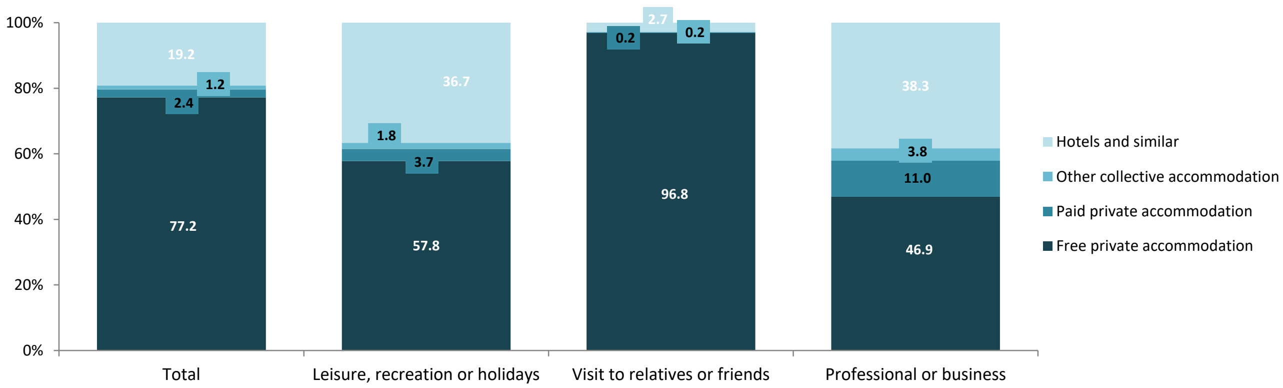


In 2021, pre-booked trips accounted for 31.0% of the total (-0.5 p.p. compared to 2020) and 83.7% of the trips abroad (-2.2 p.p.). The internet was used in 19.1% (-1.6 p.p.) of trips in 2021, a figure that increases to 64.1% when considering only trips abroad.

"Hotels and similar" strengthened their predominance in the quarter and in annual terms

"Hotels and similar" hosted 19.2% of overnight stays spent on trips in the **4th quarter of 2021**, gaining representativeness (+8.9 p.p.) for the third consecutive quarter. "Free private accommodation" remained the main accommodation option (77.2% of all overnight stays) although it lost representativeness (-8.5 p.p.).

Figure 8. **Breakdown of overnight stays by type of accommodation, according to main purposes, 4th Q 2021**

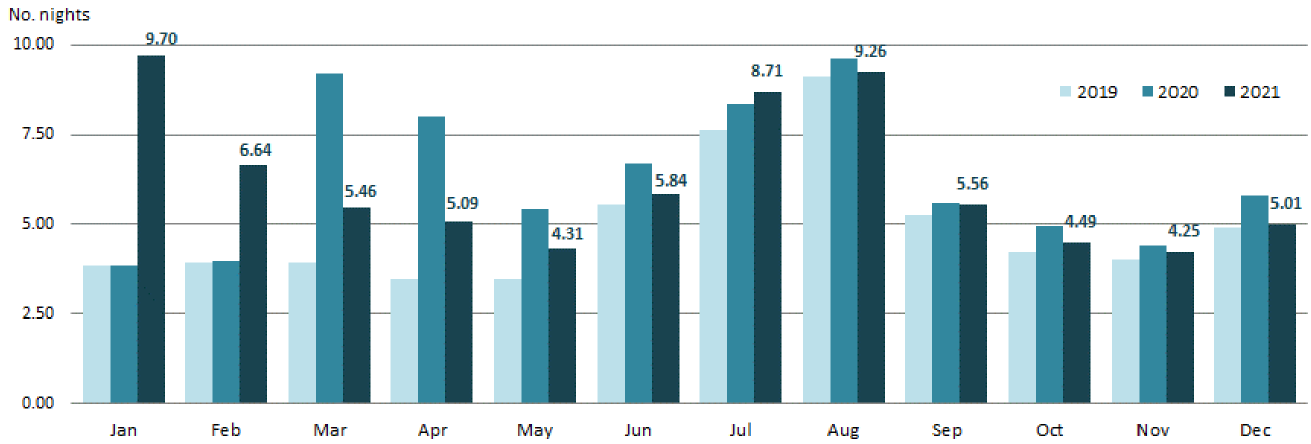


In 2021, overnight stays spent in "free private accommodation" lost preponderance in the total, corresponding to 66.3% (69.2% in 2020). Conversely, "hotels and similar" gained representativeness (23.4% of total overnight stays; +2.7 p.p.), as a result of the increase of 33.8% in the number of overnight stays spent in this type of accommodation compared to 2020.

The average number of overnight stays per tourist decreased in the quarter and year-on-year, yet increased when compared to 2019

In the **4th quarter of 2021**, each resident tourist slept, on average, 4.67 nights during tourism trips (-10.7%; 5.22 nights in the 4th quarter of 2020; 4.49 nights in the 4th quarter of 2019). The highest average stay was observed in trips taken in December (5.01 nights).

Figure 9. **Overnight stays spent by tourists during trips, by month**

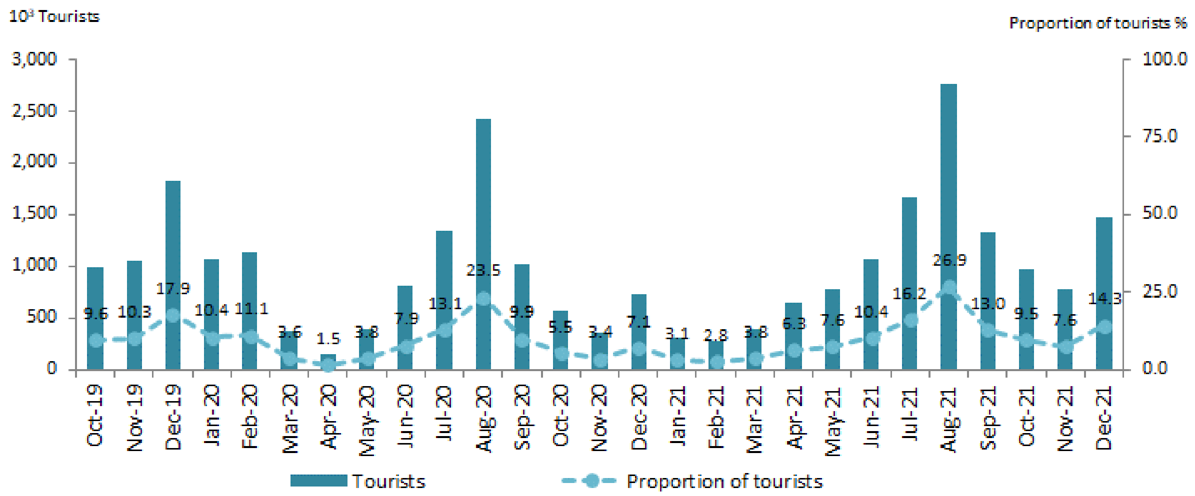


In **2021 as a whole**, each tourist spent an average of 6.62 overnight stays (6.72 in 2020 and 5.45 in 2019), with very high figures in the pandemic months of January and February of 2021 (9.70 nights and 6.64 nights, respectively) compared with the same months in 2019 and 2020 when the pandemic had not been declared in Portugal.

The proportion of resident tourists increased in the quarter

In the **4th quarter of 2021**, 17.7% of the resident population made at least one tourism trip, i.e., an increase of 8.1 p.p. compared to the 4th quarter of 2020 (22.2% in the 4th quarter of 2019). In this quarter, every month registered year-on-year increases compared to 2020 in the proportion of residents who travelled (+4.0 p.p., +4.1 p.p., and +7.2 p.p. in October, November, and December, respectively) but still below the 2019 levels: -0.1 p.p. in October, -2.8 p.p. in November, and -3.5 p.p. in December.

Figure 10. **Proportion of tourists in the resident population, by month**



METHODOLOGICAL NOTE

Results from the "Travel survey of residents" are gathered from surveying a sample of housing units, with a 50% rotation at the beginning of each year, with a quarterly telephone interview.

Results in this Press Release are:

Up until 2020 – definitive data

2021 – provisional data

Main concepts

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.

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.

Hotels and similar – Tourist accommodation establishments whose main economic activity consists of the provision of accommodation services and other complementary or support services, with or without the 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 – 27th of July 2022
