27 April 2023
TOURISM DEMAND OF RESIDENTS
4th Quarter 2022

TOURIST TRIPS MADE BY RESIDENTS GREW BY 33.8% IN 2022, BUT WERE STILL SHORT OF 2019 LEVELS

In **2022**, trips made by residents increased by 33.8%[1] and amounted to 23.4 million (-4.2% compared to 2019; +21.6% in 2021). Domestic trips increased by 25.1% and trips abroad grew by 176.0% (-3.4% and -9.9%, in the same order, when compared to 2019; +20.2% and +48.8%, respectively, in 2021). Free private accommodation, despite losing expression, continued to be the main means of accommodation used (60.8%, -5.5 p.p.[2] compared to 2021). The average trip duration was 4.21 nights (4.72 nights in 2021 and 4.05 nights in 2019).

The Centro region (30.3%) strengthened its position as the main destination of domestic trips, followed by the Norte region (21.6%) and the AM Lisboa (17.6%), which overtook the Algarve. Spain (38.2%), France (10.7%) and Italy (6.5%) remained the main countries of destination for trips abroad.

In the **4th quarter of 2022**, residents in Portugal made 5.1 million trips, which corresponded to an increase of 10.4% (-7.9% compared to the 4th quarter of 2019; +5.9% in the 3rd quarter of 2022). Domestic trips represented 87.7% of the total trips (4.5 million) increasing by 6.0% (-8.7% when compared with the 4th quarter of 2019). Trips abroad increased by 56.7% (-1.3% vis-à-vis the 4th quarter of 2019; +109.0% in the 3rd quarter of 2022), amounting to 625.0 thousand trips, corresponding to 12.3% of the total trips.

Tourist trips made by residents grew by 33.8% in 2022, but still not reaching 2019 levels

In the 4th quarter of 2022, the residents in Portugal took 5.1 million trips, an increase of 10.4% year-on-year (+5.9% in the 3rd quarter of 2022). However, the figures were still 7.9% below those recorded in the 4th quarter of 2019, when 5.5 million trips were made.

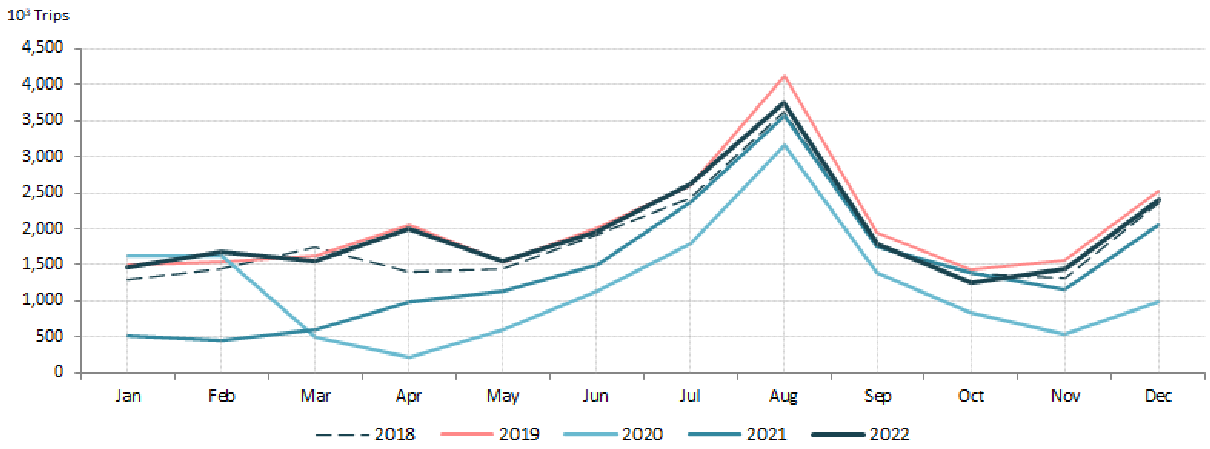
The number of trips increased in November and December by +25.5% and +16.8%, respectively. In October, there was a decrease of 11.3%, which may be justified by calendar effects, which determine, to a certain extent, residents' travel decisions. When compared to the same months in 2019, the rates of change were -13.9% in October, -7.4% in November, and -4.7% in December.

In 2022 as a whole (provisional results), there were 23.4 million trips made (+33.8% vis-à-vis 2021; -4.2% compared to 2019).

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

[2] When analysing proportions, a comparison is made between corresponding periods of previous years.

Figure 1. **Tourism trips of residents by month**



In the **4th quarter of 2022**, domestic trips corresponded to 87.7% of all the trips made (88.4% in the 3rd quarter of 2022; 88.5% in the 4th quarter of 2019), increasing by 6.0% year-on-year (-8.7% compared to the 4th quarter of 2019; -0.6% in the 3rd quarter of 2022). Monthly, the rates of change were -14.4% in October, +22.0% in November, and +10.7% in December. Tourist trips abroad increased by 56.7%, accounting for 625.0 thousand trips (-1.3% compared to the 4th quarter of 2019; +109.0% in the 3rd quarter of 2022), representing 12.3% of the total (11.6% in the 3rd quarter of 2022; 11.5% in the 4th quarter of 2019).

Table 1. **Tourism trips by destination, by month**

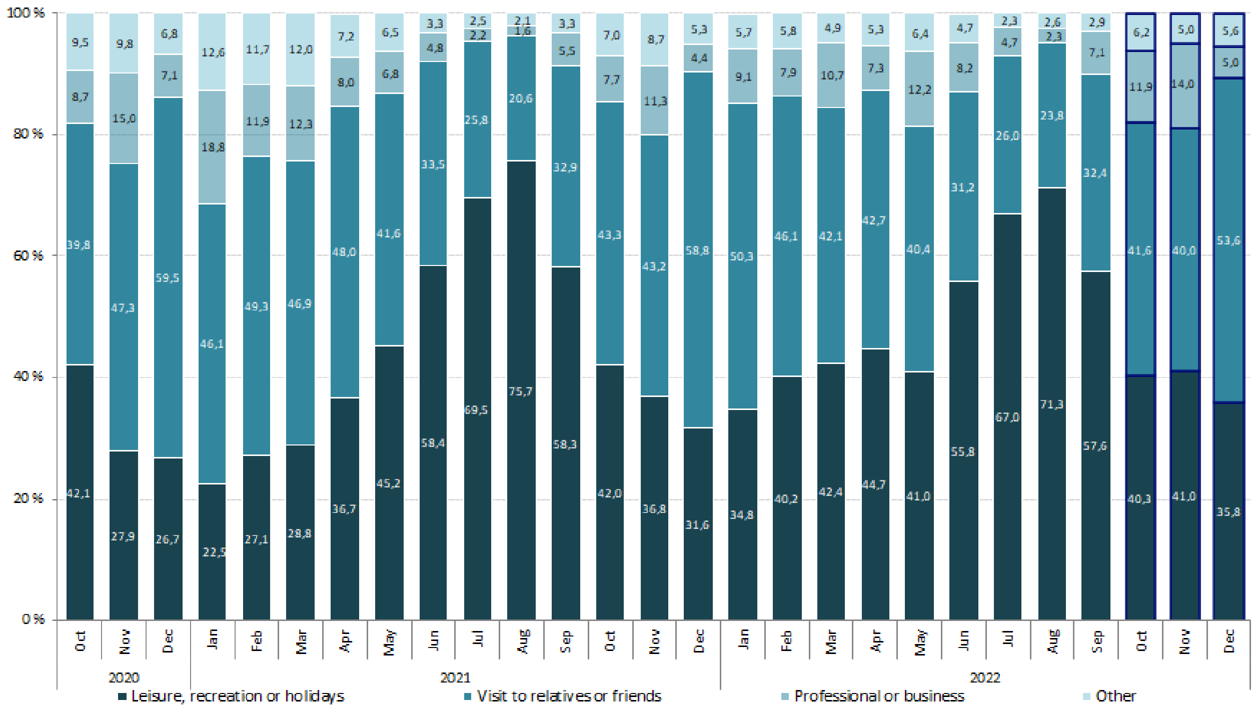
Unit: 10^3

MONTH	Total (No)				Total Portugal (No)				Total Abroad (No)			
	2019	2020	2021	2022	2019	2020	2021	2022	2019	2020	2021	2022
Total	**24,463**	**14,410**	**17,518**	**23,439**	**21,363**	**13,730**	**16,506**	**20,646**	**3,100**	**680**	**1,012**	**2,793**
January	1,501	1,627	522	1,458	1,313	1,430	494	1,352	188	198	28	106
February	1,539	1,620	456	1,669	1,363	1,412	445	1,525	176	208	11	144
March	1,634	490	607	1,559	1,422	452	600	1,367	212	38	7	193
April	2,060	222	987	2,001	1,739	220	976	1,686	321	3	11	315
May	1,539	608	1,138	1,547	1,356	607	1,109	1,354	184	0	30	194
June	2,001	1,137	1,491	1,955	1,677	1,127	1,420	1,689	323	9	71	266
July	2,607	1,803	2,374	2,625	2,304	1,765	2,272	2,330	303	38	101	294
August	4,122	3,155	3,573	3,741	3,595	3,080	3,391	3,328	527	74	182	413
September	1,939	1,398	1,761	1,795	1,705	1,349	1,590	1,552	234	49	171	244
October	1,443	829	1,400	1,243	1,278	805	1,252	1,071	165	24	148	171
November	1,555	541	1,147	1,440	1,365	527	1,036	1,264	190	14	111	176
December	2,524	980	2,061	2,406	2,246	956	1,922	2,128	278	23	139	278

"Visit to relatives or friends" was the main motivation for travel in the **4th quarter of 2022**, accounting for 2.4 million trips (+3.0%; -13.7% when compared to the 4th quarter of 2019), although representativeness have decreased by 3.4 p.p. (46.8% of the total). "Leisure, recreation, or holidays" as a motivation to travel corresponded to 2.0 million trips made (+17.6%; +1.5% in the 3rd quarter of 2022), representing 38.4% of the total (+2.3 p.p. compared to the 4th quarter of 2021), being the only motivation with a positive variation compared to the same period of 2019 (+5.4%). Trips for "professional or business" reasons (469.0 thousand), corresponding to 9.2% of the total (+2.1 p.p.), increased by 42.8% (-9.4% compared to 2019; +63.4% in the 3rd quarter of 2022).

Considering the trips made in **2022 as a whole**, “leisure, recreation, or holidays” was the main motivation to travel (50.6%), corresponding to 11.9 million trips (+29.0% compared to 2021; -1.9% vis-à-vis 2019). “Visit to relatives or friends” ranked second as a motivation to travel at 37.5% of all trips taken (8.8 million trips, +36.4%; -5.0% compared to 2019). “Business or professional” trips represented 7.4% of the total (1.7 million trips) and registered the largest rate of change compared to 2021 (+75.2%), yet they stood below the 2.0 million trips made in 2019 for the same reason.

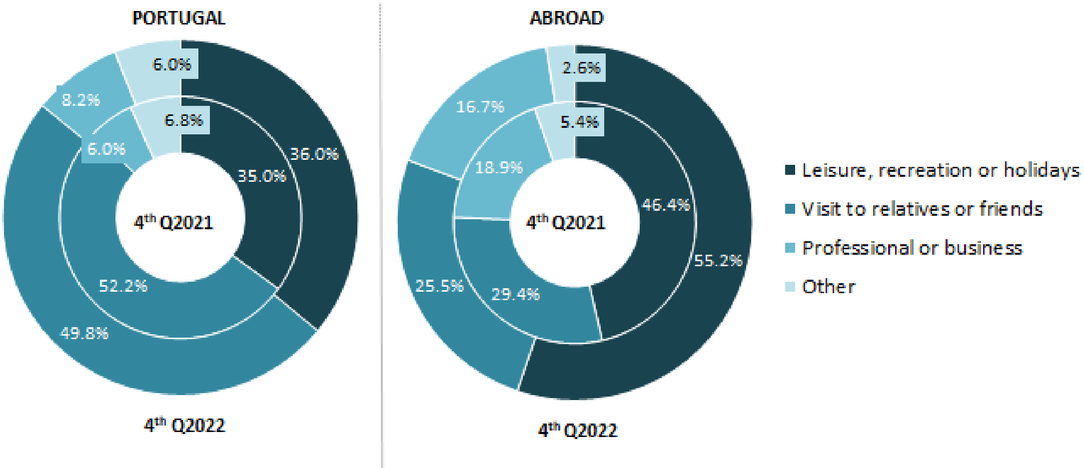
Figure 2. **Breakdown of trips according to the main purposes, by month**



“Leisure, recreation, or holidays” trips represented more than half the trips abroad in the 4th quarter of 2022

In the **4th quarter of 2022**, “visit to relatives or friends” as a motivation to travel was associated with half of all domestic trips (2.2 million; a share of 49.8%) and it stood as the second main motivation in trips abroad (159.1 thousand trips; a share of 25.5%). “Leisure, recreation, or holidays” was the main reason for trips abroad (345.2 thousand trips; a share of 55.2%) and the second reason for domestic trips (1.6 million trips; weight of 36.0%).

Figure 3. **Breakdown of trips according to purposes, by destination**

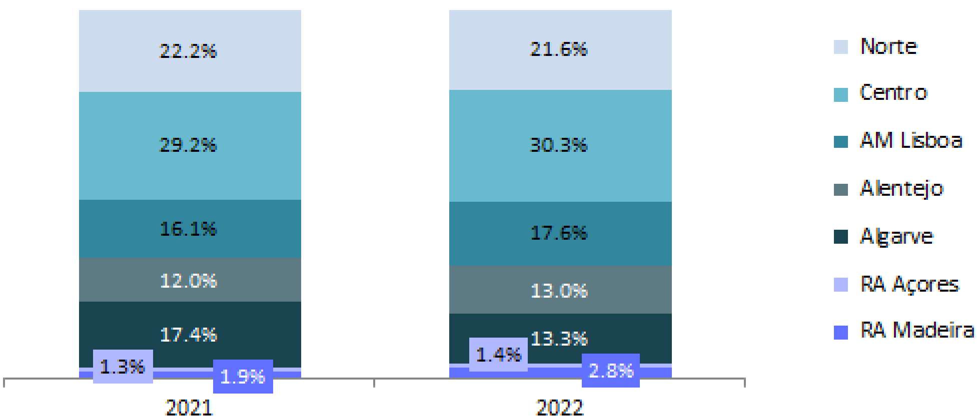


In 2022 as a whole, the number of trips abroad increased by 176.0% (-9.9% compared to 2019; +48.8% in 2021), standing for 11.9% of the total (+6.1 p.p.), mostly for “leisure, recreation, or holidays” (share of 65.3%, +15.5 p.p.). Domestic trips increased by 25.1% (-3.4% compared to 2019; +20.2% in 2021), with “leisure, recreation, or holidays” also being the motivation to travel associated with the highest number of trips (share of 48.7%; -4.0 p.p.).

AM Lisboa rose to 3rd position as main destination for domestic trips in total 2022, overtaking the Algarve

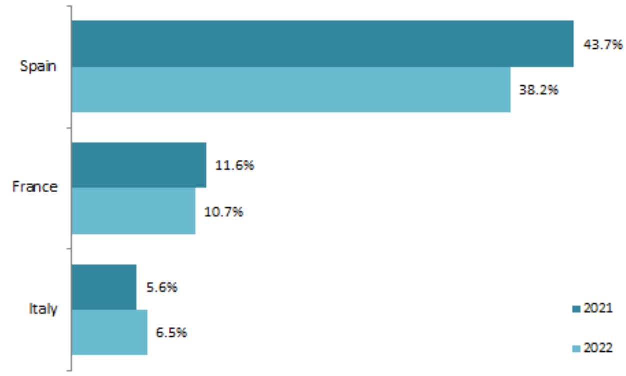
In 2022 as a whole, the Centro region strengthened its position as the main destination region for domestic trips, corresponding to 30.3% of the total (+1.1 p.p. compared to 2021), followed by the Norte region (21.6% of the total; -0.6 p.p.). AM Lisboa was the region that became more relevant compared to the previous year (+1.5 p.p.), ranking 3rd as the main destination for domestic trips (17.6% of the total), surpassing the Algarve (13.3%, -4.1 p.p.).

Figure 4. **Distribution of domestic trips by NUTS II**



In 2022 as a whole, Spain, France, and Italy kept ranking 1st, 2nd, and 3rd as main destination countries for trips abroad, respectively, with 38.2% (-5.5 p.p.), 10.7% (-0.9 p.p.), and 6.5% (+0.9 p.p.) of trips. Among the trips made abroad, the ones that had as a destination the countries of the European Union decreased (-3.9 p.p. compared to 2021, to 78.5% of the total).

Figure 5. **The proportion of trips to the three main foreign destinations**

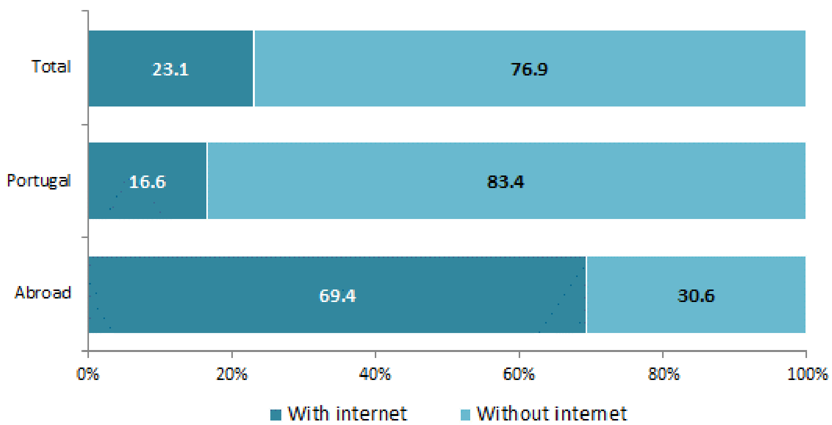


The use of the Internet to organise trips gained expression regarding both destinations in the quarter and in 2022 as a whole

In the **4th quarter of 2022**, 33.9% of the trips were made through the booking of services (+7.0 p.p.), a proportion that amounted to 91.5% (+1.9 p.p.) for trips abroad. In domestic trips, the booking of services was used in 25.8% of the trips (+4.9 p.p.).

The Internet was used to organise 23.1% of the trips (+5.4 p.p.), having been an option in 69.4% (+0.7 p.p.) of trips abroad and 16.6% (+3.8 p.p.) of domestic trips.

Figure 6. **Breakdown of trips according to the use of the internet, by destination, 4th quarter of 2022**

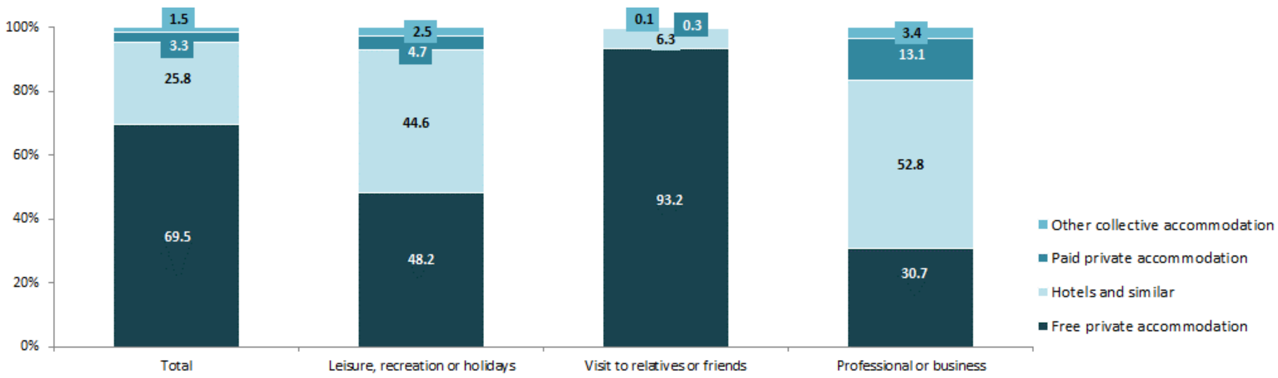


In 2022, pre-booked trips accounted for 37.9% of the total (+7.0 p.p. compared to 2021) and 93.4% of the trips abroad (+9.7 p.p.). The Internet was used in 25.8% (+6.7 p.p.) of trips in 2022; in 20.0% of domestic trips (+3.6 p.p.), and in 68.6% of trips abroad (+4,6 p.p.).

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

"Hotels and similar" establishments hosted 25.8% of overnight stays spent on trips in the **4th quarter of 2022**, gaining representativeness (+6.6 p.p.; +3.5 p.p. compared to the 4th quarter of 2019). "Free private accommodation" remained the main option in terms of accommodation (69.5% of all overnight stays), although it lost representativeness (-7.8 p.p.; -4.1 p.p. compared to the 4th quarter of 2019).

Figure 7. **Breakdown of overnight stays by type of accommodation, according to main purposes, 4th quarter of 2022**

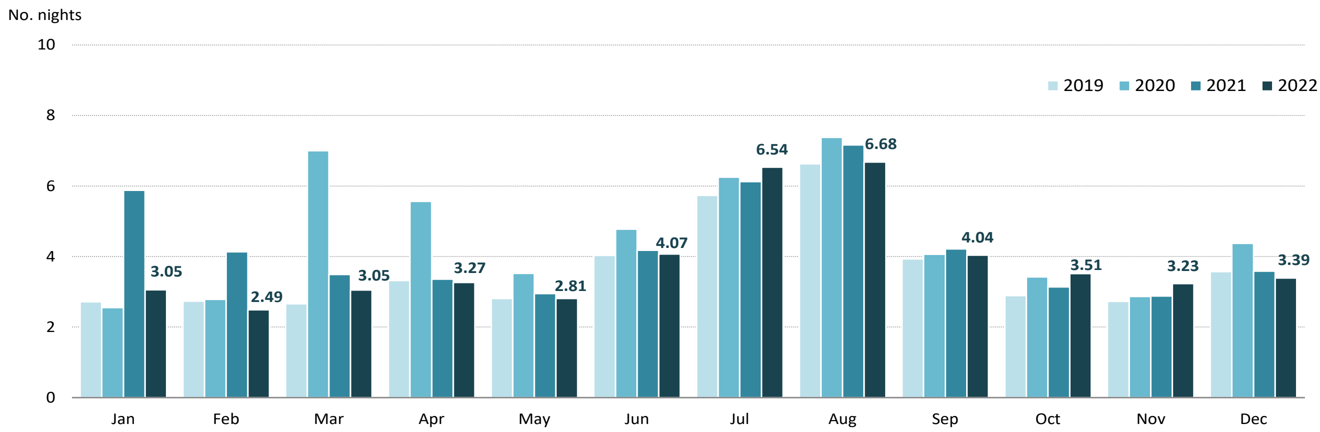


In 2022, overnight stays spent in "free private accommodation" lost preponderance in the total, corresponding to 60.8% (66.3% in 2021). Conversely, "hotels and similar" establishments gained representativeness (29.0% of total overnight stays; +5.6 p.p.), as a result of the increase of 48.1% in the number of overnight stays spent in this type of accommodation when compared to 2021.

The average trip duration increased in the 4th quarter of 2022, but decreased in annual terms

In the **4th quarter of 2022**, on average, each trip lasted 3.38 nights (3.27 nights in the 4th quarter of 2021; 3.15 nights in the 4th quarter of 2019). The lowest average duration was observed in November (3.23 nights), and the highest occurred in October (3.51 nights).

Figure 8. Average trip duration, by month

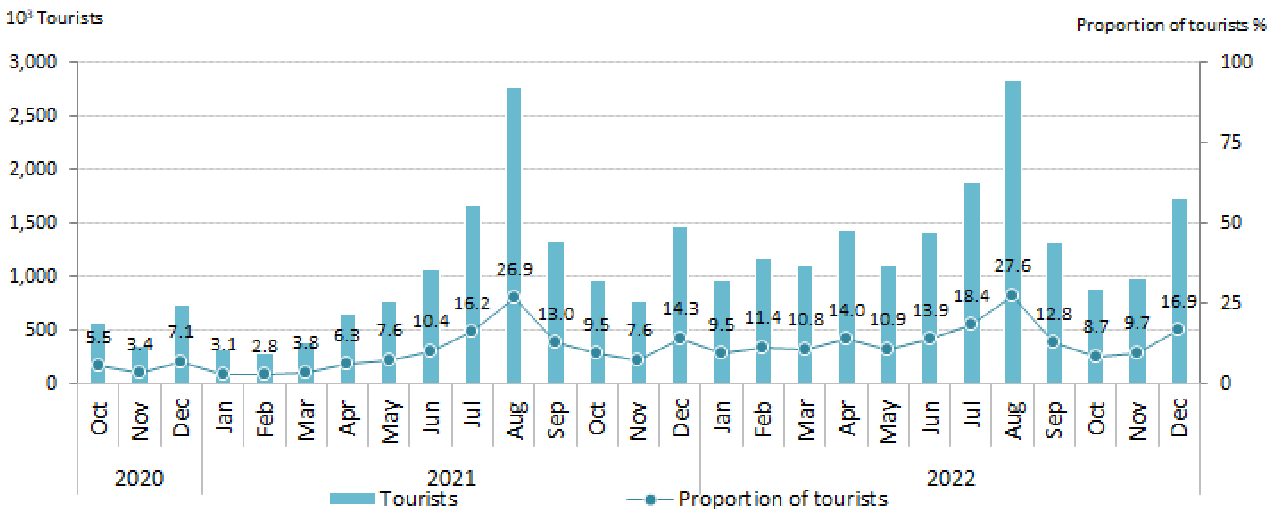


In **2022 as a whole**, each trip had an average duration of 4.21 nights (4.72 nights in 2021 and 4.05 nights in 2019).

The proportion of resident tourists increased in the quarter, but below 2019 figures

In the **4th quarter of 2022**, 20.8% of the resident population made at least one tourism trip, i.e., an increase of 3.2 p.p. compared to the 4th quarter of 2021 (22.2% in the 4th quarter of 2019). On a monthly analysis, there were increases in the proportion of residents who travelled in November and December (+2.1 p.p. and +2.6 p.p., respectively, compared to the same months in 2021), having decreased slightly in October (-0.8 p.p.). Compared with the same months in 2019, the rates of change observed were -0.9 p.p. in October, -0.6 p.p. in November and -1.0 p.p. in December.

Figure 9. 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.

The results in this Press Release are:

Up until 2021 – final data

2022 – 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 2023