



28 April 2023
TOURIST ACTIVITY
March 2023 – Flash Statistics

NORTH AMERICAN MARKET WITH THE HIGHER GROWTH IN OVERNIGHT STAYS, COMPARED TO 2019

The **tourist accommodation sector**¹ registered 2.1 million guests and 5.1 million overnight stays in **March 2023**, corresponding to increases of 30.8% and 26.7%², respectively (+32.5% and +37.7% in February 2023, in the same order). Compared to March 2019, there were increases of 10.4% in guests and 10.2% in overnight stays.

In March, the domestic market contributed 1.5 million overnight stays (+16.3%) and external markets totalled 3.6 million (+31.6%). Vis-à-vis March 2019, there were increases of 10,0% in overnight stays from residents and 10.3% from non-residents.

Overnight stays from United Kingdom residents (17.0% of total overnight stays from non-residents in March) increased by 8.9% compared to March 2019. The German market (13.7% share) decreased by 3.6% while the Spanish market (9.0% share) grew by 2.9%. The growth of the North American market continued to stand out, both compared to March 2022 (+71,4%) and to March 2019 (+77,9%).

Compared to March 2019, residents' overnight stays increased in all the regions, more than doubling in RA Madeira (+105,2%). Regarding non-residents, only in the Algarve overnight stays did not reach 2019 levels (-0,7%).

The net bed occupancy rate in tourist accommodation establishments (39.2%) increased 5.8 p.p. in March (36,5%, +7.4 p.p. in February). The net bedroom occupancy rate (49.6%) increased 7.5 p.p. (45,9%, +10.1 p.p. in February). Vis-à-vis March 2019, there were increases of 0.6 p.p. and 2.2 p.p., respectively.

In the **first quarter of 2023**, overnight stays increased by 40.9%, +22.5% in residents and +51.6% in non-residents. Compared to the first quarter of 2019, overnight stays grew by 14.1%, +19.6% in residents and +11.8% in non-residents.

In March, 28.7% of tourist accommodation establishments were closed or did not register guests (33.6% in February).

¹ Monthly series which include three types of accommodation facilities: hotel establishments (hotels, apartment hotels, tourist apartments, tourist villages, pousadas and quintas da Madeira), local accommodation with 10 or more beds (according to the statistical threshold defined by EU Regulation 692/2011) and tourism in rural areas and lodging tourism.

² Unless stated otherwise, the rates of change presented in this press release correspond to year-on-year rates of change.



Table 1. Global results of the tourist accommodation sector

Tourist accommodation establishments	Unit	February 2023		March 2023		Jan - Mar 23	
		Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)
Guests	10³	1 646.9	32.5	2 057.4	30.8	5 159.8	40.8
Residents in Portugal	"	772.7	15.4	837.8	17.7	2 297.1	22.0
Residents abroad	"	874.2	52.6	1 219.6	41.5	2 862.7	60.6
Overnight stays	10³	4 022.7	37.7	5 077.8	26.7	12 563.0	40.9
Residents in Portugal	"	1 348.7	17.7	1 492.3	16.3	4 017.1	22.5
Residents abroad	"	2 674.0	50.7	3 585.5	31.6	8 545.9	51.6
Average stay	no. of nights	2.44	3.9	2.47	-3.1	2.43	0.1
Residents in Portugal	"	1.75	2.0	1.78	-1.2	1.75	0.4
Residents abroad	"	3.06	-1.2	2.94	-7.0	2.99	-5.6
Net bed occupancy rate	%	36.5	7.4 p.p.	39.2	5.8 p.p.	35.2	8.0 p.p.
Net bedroom occupancy rate	%	45.9	10.1 p.p.	49.6	7.5 p.p.	44.4	10.4 p.p.