26 April 2024
TOURISM DEMAND OF RESIDENTS
4th Quarter 2023

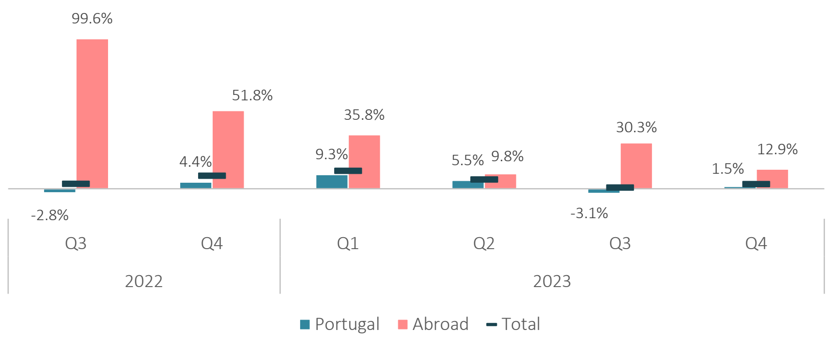
TOURIST TRIPS ABROAD BY RESIDENTS REACHED AN ALL-TIME HIGH IN 2023

In 2023 as a whole, the number of trips made by residents grew by 4.6%[1] and totalled 23.7 million. Domestic trips increased by 2.4% and trips abroad grew by 21.5%, reaching an all-time high. Free private accommodation became more relevant and remained the main means of accommodation used (61.3%, +0.2 p.p.[2] compared to 2022). The average duration of trips was 4.08 nights (4.18 nights in 2022).

Spain (41.6%; +3.2 p.p.), France (10.1%, -0.7 p.p.) and Italy (6.9%, +0.2 p.p.) remained the main destination countries for residents travelling abroad.

In the **4th quarter of 2023**, residents in Portugal made 5.1 million trips, which corresponded to a growth of 2.9% (+0.7% in the 3rd quarter of 2023). Domestic trips accounted for 86.7% of all trips (4.5 million), i.e., an increase of 1.5%. Trips abroad grew by 12.9% (+30.3% in the 3rd quarter of 2023), totalling 683,600 trips, which corresponded to 13.3% of the total.

Figure 1. **Year-on-year change (%) in resident trips by destination, quarterly**



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

[2] When analysing proportions, a year-on-year comparison between quarters is carried out.

Tourist trips abroad made by residents reached an all-time high in 2023

In **the 4th quarter of 2023**, residents in Portugal made 5.1 million trips, which corresponded to an increase of 2.9% compared to the same period in 2022 (+0.7% in the 3rd quarter of 2023). The number of trips kept below the levels of the 4th quarter of 2019 (-6.8%), when 5.5 million trips were made.

The number of trips increased in October and December (+2.1% and +8.5% respectively), while a decrease in November (-6.2%) occurred. Compared to the same months in 2019, there were rates of change of -10.1% in October, -18.6% in November, and +2.3% in December.

In **the 4th quarter of 2023**, domestic trips accounted for 86.7% of trips (85.2% in the 3rd quarter of 2023; 88.5% in the 4th quarter of 2019) and grew by 1.5% compared to the same period in 2022 (-3.1% in the 3rd quarter of 2023; -8.7% compared to the 4th quarter of 2019). In a monthly analysis, there were increases of 2.5% in October and 7.1% in December, and a decrease of 9.1% in November. Trips abroad accounted for 13.3% of the total in the last quarter of the year (+1.2 p.p. compared to the 4th quarter of 2022 and +1.8 p.p. compared to the 4th quarter of 2019) and grew by 12.9%, totalling 683.6 thousand trips (+30.3% in the 3rd quarter of 2023; +8.0% compared to the 4th quarter of 2019). When carrying a monthly analysis, there was only a slight decrease in trips abroad by residents in October (-0.1%), having increased in November and December (+15.7% and +19.1%, respectively).

In **2023 as a whole** (provisional results), there were 23.7 million trips, i.e., an increase of 4.6% compared to 2022(-3.2% compared to 2019).

Table 1. Tourism trips by destination, by month

Unit: 10^3

MONTH	Total (No)			Total Portugal (No)			Total Abroad (No)		
	2019	2022	2023	2019	2022	2023	2019	2022	2023
Total	24 463	22 627	23 668	21 363	19 969	20 440	3 100	2 657	3 228
January	1 501	1 373	1 570	1 313	1 275	1 423	188	97	148
February	1 539	1 538	1 781	1 363	1 401	1 529	176	137	252
March	1 634	1 431	1 502	1 422	1 261	1 352	212	170	150
April	2 060	1 972	2 177	1 739	1 666	1 873	321	306	304
May	1 539	1 456	1 546	1 356	1 282	1 334	184	174	212
June	2 001	1 901	1 933	1 677	1 641	1 636	323	260	297
July	2 607	2 565	2 523	2 304	2 294	2 192	303	271	330
August	4 122	3 614	3 685	3 595	3 206	3 136	527	408	548
September	1 939	1 778	1 806	1 705	1 549	1 502	234	229	305
October	1 443	1 270	1 297	1 278	1 103	1 130	165	167	166
November	1 555	1 350	1 266	1 365	1 188	1 080	190	161	187
December	2 524	2 381	2 583	2 246	2 103	2 252	278	278	331

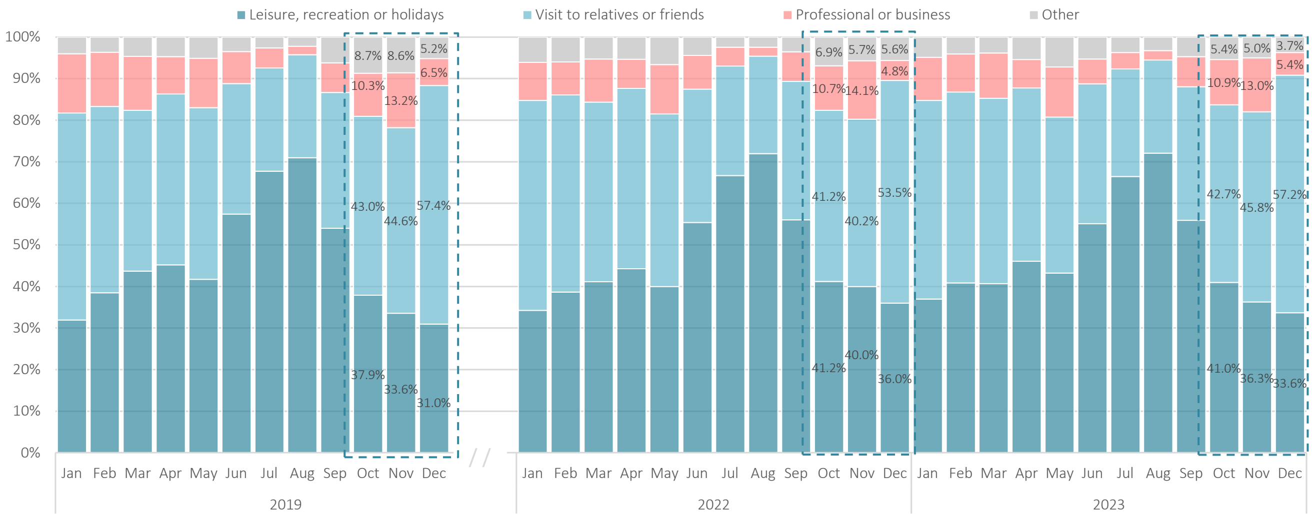
Trips for *professional or business* reasons recorded the biggest decrease in comparison with the pre-pandemic period

Visiting family or friends was the main reason for travelling in the **4th quarter of 2023**, totalling 2.6 million trips (+11.5%; -5.6% compared to the 4th quarter of 2019), accounting for around half of all trips (50.7%, +3.9 p.p. compared to the 4th quarter of 2022). *Leisure, recreation or holiday* reasons to travel were associated with 1.9 million trips (-3.2%), which represented 36.1% of the total (-2.3 p.p. compared to the 4th quarter of

2022). The latter was the only reason to travel that recorded a positive rate of change in the 4th quarter of 2023 compared to the same period in 2019, albeit a slight one (+0.5%). Trips for *professional or business* reasons (446.2 thousand), which accounted for 8.7% of the total (-0.2 p.p.), increased by 1.0% (-13.8% compared to 2019).

Considering **the total number of trips made in 2023**, the main reason for travelling was *leisure, recreation or holidays* (50.1%), corresponding to 11.9 million trips (+4.1% compared to 2022; -2.0% compared to 2019). *Visiting family or friends* was the second main reason for travelling, accounting for 38.2% of trips (9.0 million trips, +5.6% compared to 2022; -2.1% compared to 2019). *Professional or business* reasons for travelling accounted for 7.2% of the total (1.7 million trips), up by 4.9% compared to 2022. Trips taken for the latter reason accounted for the largest decrease compared to the pre-pandemic period (-15.5%).

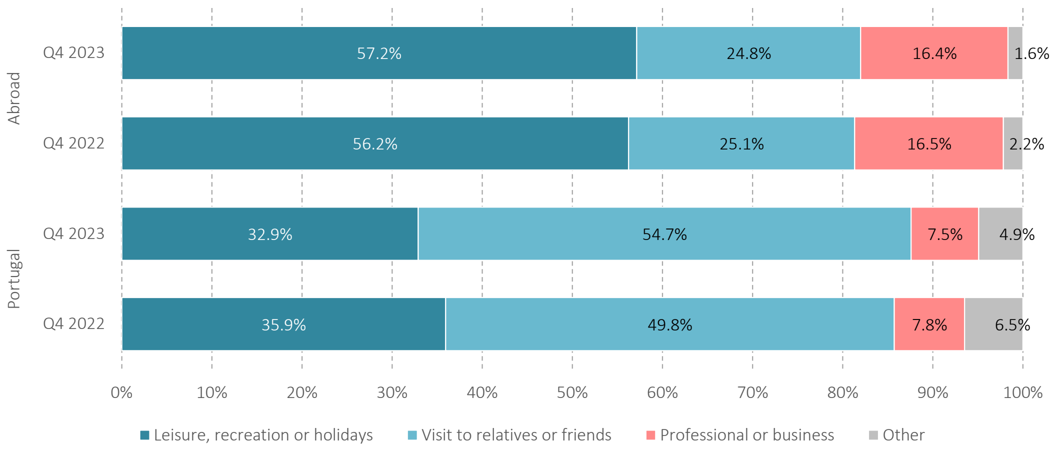
Figure 2. **Breakdown of trips according to the main purposes, by month**



More than half of trips abroad in the 4th of 2023 were taken for *leisure, recreation or holiday* purposes

In **the 4th quarter of 2023**, *visiting family or friends* as the reason to travel accounted for more than half of domestic trips (2.4 million; share of 54.7%), and was the second main reason for trips abroad (169.8 thousand trips; share of 24.8%). *Leisure, recreation or holidays* were the main reason for trips abroad (390.7 thousand trips; weight of 57.2%) and the second reason for domestic trips (1.5 million trips; share of 32.9%).

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

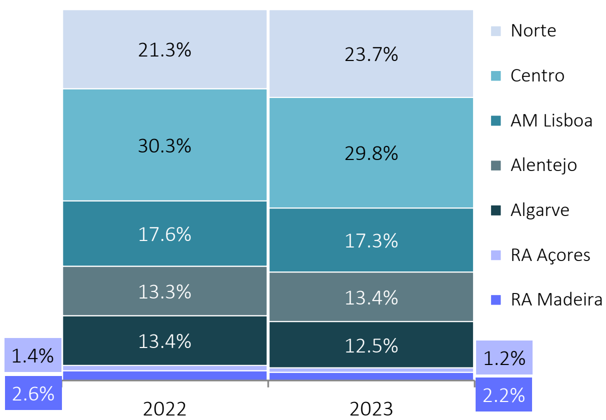


In **2023**, domestic trips grew by 2.4% (-4.3% compared to 2019), accounting for 86.4% of the total (-1.9 p.p.), mostly for *leisure, recreation or holiday* reasons (share of 47.2%, -1.1 p.p.). Trips abroad increased by 21.5% (+4.1% compared to 2019), and it was also *leisure, recreation or holidays* that were associated with a greater number of trips (share of 68.2%; +3.1 p.p.).

Norte consolidated its 2nd position in the rank as the main destination for domestic trips in 2023

In 2023 as a whole, the Centro region kept the leading position as the main destination region for domestic trips, concentrating 29.8% of the total (-0.5 p.p. compared to 2022), followed by the Norte region (23.7% of the total), which gained in representativeness compared to the previous year (+2.4 p.p.).

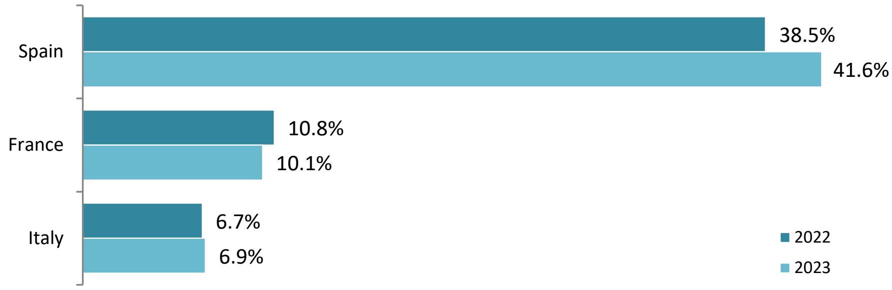
Figure 4. **Distribution of domestic trips by NUTS II**



Trips made within the European Union stood for 79% of all trips abroad

In total for 2023, Spain, France, and Italy once again ranked 1st, 2nd and 3rd as the main destinations for trips abroad, with shares of 41.6% (+3.2 p.p.), 10.1% (-0.7 p.p.) and 6.9% (+0.2 p.p.) of all trips made, respectively. Among trips abroad, those to European Union countries as a whole increased by 22.0%, accounting for 79.0% of the total (+0.3 p.p.).

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

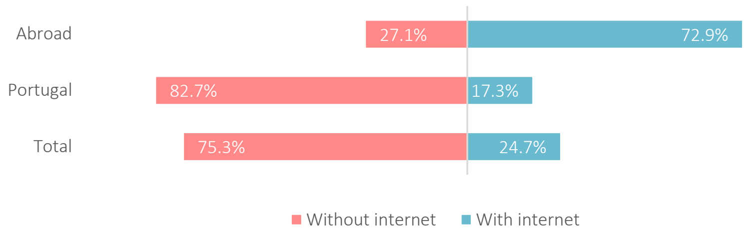


The use of the internet for organising trips gained expression in the 4th quarter, especially in trips abroad

In **the 4th quarter of 2023**, the prior booking of services was used in 35.3% of all trips made (+2.2 p.p.), having reached 92.4% (+1.2 p.p.) in terms of trips with a foreign destination. The prior booking of services was linked to 26.5% of all domestic trips (+1.4 p.p.).

In the process of organising trips, the Internet was used in 24.7% of trips (+2.1% p.p.), with this option being used in 72.9% (+3.6 p.p.) of trips abroad and 17.3% (+1.1 p.p.) of domestic trips.

Figure 6. **Breakdown of trips according to the use of the internet, by destination, 4th quarter of 2023**

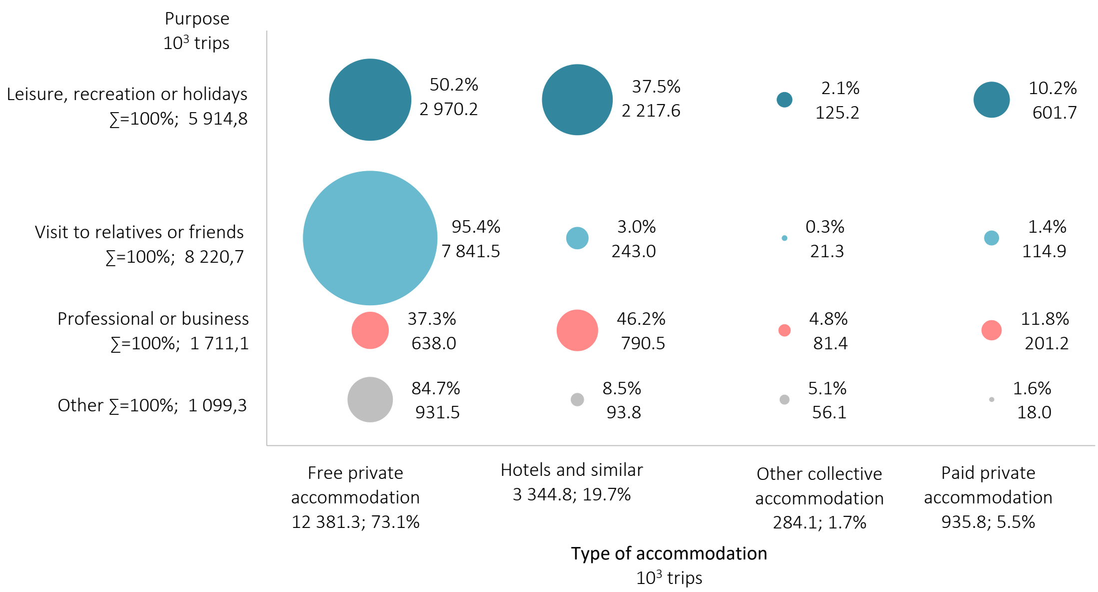


In **2023**, in 38.9% of all trips (+1.6 p.p. compared to 2022), residents chose to use pre-booked services, and for trips abroad this was the option in 92.2% (-0.9 p.p.) of the situations. The Internet was used in 25.7% (+0.5 p.p.) of trips, 19.2% of trips to Portugal (-0.2 p.p.) and 66.9% of trips abroad (-1.8 p.p.).

Free private accommodation strengthened its expression in overnight trips

Free private accommodation strengthened its position as the main accommodation option for resident trips (73.1% of overnight stays) in the 4th quarter of 2023, having increased its weight in the total (+3.4 p.p.; -0.5 p.p. compared to the 4th quarter of 2019). *Hotels and similar* were the second main accommodation option, concentrating 19.7% of overnight stays (3.3 million). This type of accommodation accounted for 46.2% of overnight stays on trips for *professional or business* reasons and 37.5% of trips for *leisure, recreation or holidays*.

Figure 7. Breakdown of overnight stays by type of accommodation, according to main purposes, 4th quarter of 2023



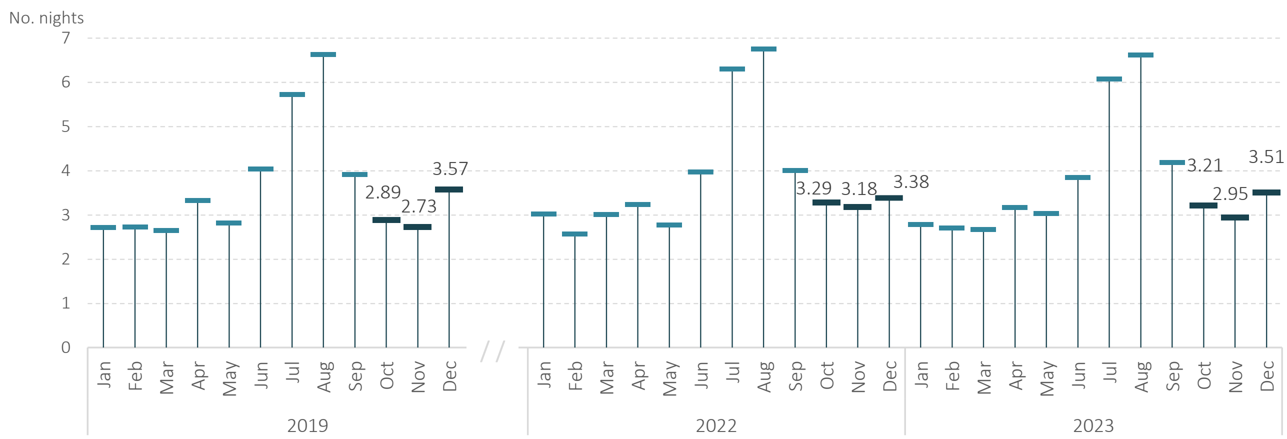
In 2023, overnight stays in *free private accommodation* accounted for 61.3% (61.1% in 2022) and increased by 2.3% (-2.6% compared to 2019). *Hotels and similar* accounted for 23.6% of total overnight stays, while *private paid* accommodation accounted for 11.0% of the total.

The average trip duration decreased

In the **4th quarter of 2023**, each trip had an average duration of 3.29 nights (3.30 in the 4th quarter of 2022; 3.15 in the 4th quarter of 2019). The lowest average duration was recorded in November (2.95 nights), while the longest occurred in December (3.51 nights).

In 2023 as a whole, each trip had an average duration of 4.08 nights (4.18 nights in 2022 and 4.05 nights in 2019).

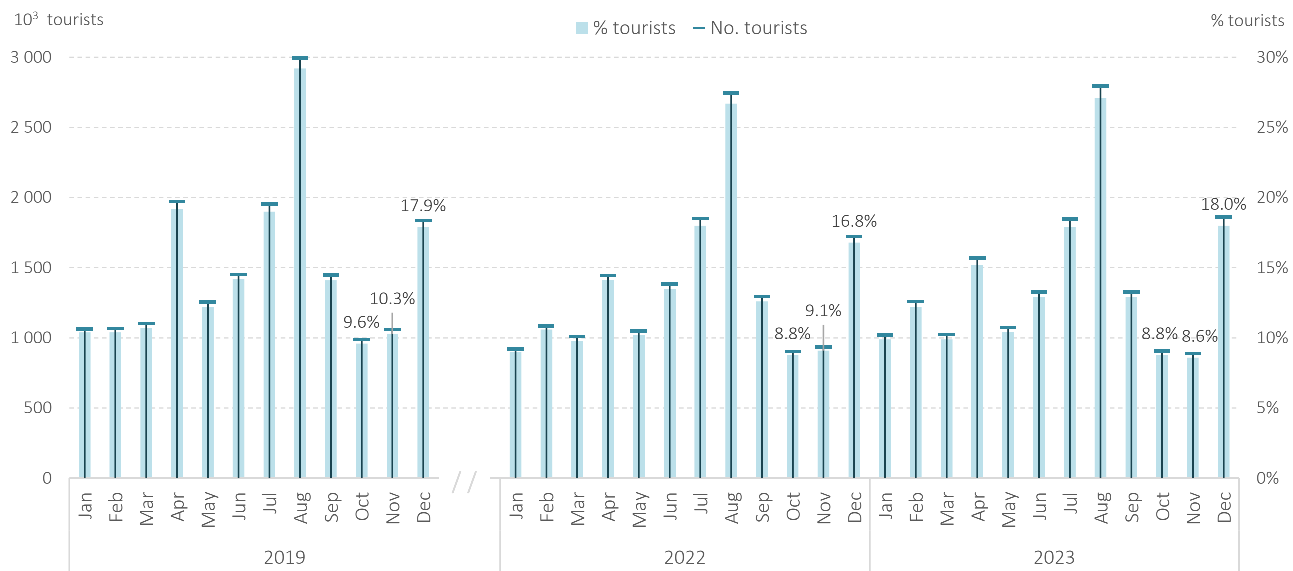
Figure 8. **Average trip duration, by month**



The proportion of resident tourists increased in the quarter but stood below 2019 levels

In **the 4th quarter of 2023**, 21.9% of residents made at least one tourist trip, i.e., an increase of 1.6 p.p. compared to the same period of the previous year (22.2% in the 4th quarter of 2019). In a monthly analysis, the proportion of residents who travelled remained at the same level in October, while in November this proportion fell slightly (-0.5 p.p.), followed by an increase in December (+1.2 p.p.). Compared to the same months in 2019, the rates of change were -0.8 p.p. in October, -1.7 p.p. in November, and +0.1 p.p. in December.

Figure 9. **Proportion of tourists in the resident population, by month**



METHODOLOGICAL NOTE

The statistical findings 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 2022 – final data

2023 – 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 – 26th of July 2024