



15 May 2025
TOURIST ACTIVITY
1st Quarter of 2025

RA MADEIRA AND ALGARVE WERE THE REGIONS MOST DEPENDENT ON EXTERNAL MARKETS IN THE 1ST QUARTER OF THE YEAR

The **tourist accommodation sector**¹ accounted for 5.7 million guests and 13.4 million overnight stays in the **1st quarter of 2025**, with changes² of +2.3% and -0.5%, respectively (+6.6% and +4.6% in the same order, in the 4th quarter of 2024).

External markets were dominant, with 67.9% of total overnight stays, the lowest value since the 3rd quarter of 2022 (65.7% of the total), totalling 9.1 million (-2.3%). Overnight stays by residents rose by 3.6% to 4.3 million.

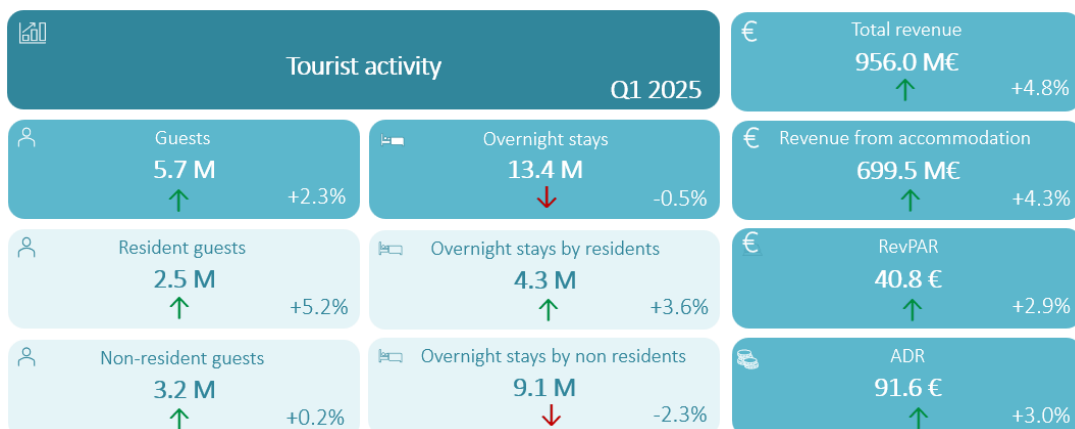
In the **1st quarter of 2025**, RA Madeira was the region most dependent on external markets regarding overnight stays (85.2% of the total), followed by Algarve (81.2%). In contrast, in Centro and Alentejo, overnight stays by non-residents were less significant in the regional totals (24.3% and 31.2% respectively).

Grande Lisboa was the region with the more overnight stays in the **1st quarter of 2025** (28.3% of the total), followed by Algarve (18.6% of the total) and Norte (18.0%). Overnight stays by residents were most concentrated in Norte (24.0% of the total), while those by non-residents were mainly spent in Grande Lisboa (32.9% of the total).

Total revenue reached EUR 956.0 million and revenue from accommodation totalled EUR 699.5 million, increasing by 4.8% and 4.3%, respectively (+11.7% and +12.1% in the previous quarter).

It should be noted that the results for the 1st quarter were influenced by the moving structure of the calendar, i.e., by the effect of the Easter holiday period, which took place in April this year, while in the previous year it was mostly concentrated in March.

Figure 1. Overview of the activity of tourist accommodation establishments, 1st quarter of 2025



¹ Monthly series that include three accommodation segments: hotel establishments (hotels, apartment hotels, tourist apartments, tourist villages, pousadas, and quintas in Madeira), local accommodation with 10 or more beds (following the statistical threshold laid down in EU Regulation 692/2011) and rural and lodging tourism.

² Unless otherwise stated, the rates of change shown in this press release correspond to year-on-year rates of change, compared to the same period in the previous year.