

14 August 2025
 TOURIST ACTIVITY
 2nd Quarter 2025

GRANDE LISBOA AND RA MADEIRA WERE THE REGIONS MOST DEPENDENT ON FOREIGN MARKETS IN THE 2ND QUARTER OF THE YEAR

The **tourism accommodation sector**¹ accounted for 9.2 million guests and 23.0 million overnight stays in the **second quarter of 2025**, with changes² of +4.4% and +4.2%, respectively (+2.4% and -0.4% in the same order, in the first quarter of 2025). Total revenue reached EUR 2.0 billion, while revenue from accommodation totalled EUR 1.6 billion, marking growth of 9.4% and 9.8%, respectively (+4.6% and +4.1% in the previous quarter).

Foreign markets accounted for the largest share, representing 72.3% of the total, with 16.7 million overnight stays (+2.9%). Overnight stays by residents increased by 7.6% to 6.4 million.

In the second quarter, Grande Lisboa depended most on foreign markets for overnight stays (82.9% of the total), followed by RA Madeira (82.4%) and Algarve (81.4%). Conversely, Centro and Alentejo showed the lowest dependence on foreign markets (34.6% and 36.0%, respectively).

In the second quarter of 2025, Algarve recorded the highest number of overnight stays (27.1% of the total), followed by Grande Lisboa (23.4%) and Norte (17.8%). Overnight stays by residents were mainly concentrated in the Norte region (21.7%), while non-resident overnight stays primarily occurred in Algarve (30.5%).

The quarterly results available in this press release were influenced by the flexible calendar structure, particularly the Easter holiday period, which occurred in the second quarter this year, whereas last year it was mainly celebrated in the first quarter.

Figure 1

OVERVIEW OF THE ACTIVITY OF TOURIST ACCOMMODATION ESTABLISHMENTS, 2ND QUARTER 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.

In the first six months of 2025, tourist accommodation establishments recorded 14.9 million guests (+3.6%) and 36.4 million overnight stays (+2.4%), amounting to EUR 3.0 billion in total revenue (+7.8%) and EUR 2.3 billion in revenue from accommodation (+8.0%). Overnight stays by residents increased by 6.0%, corresponding to 10.7 million, while those by non-residents grew by 1.0%, totalling 25.8 million.

This press release also includes data on the 'Gross monthly earnings per employee', based on information from the Monthly Statement of Earnings (*Declaração Mensal de Remunerações*) from Social Security (DMR/SS) and the Contributory Relation (*Relação Contributiva*) of *Caixa Geral de Aposentações* (RC/CGA). According to these data, the gross monthly earnings per employee (per job) in Accommodation activities (CAE 55) increased by 6.6% in the second quarter compared to the same period last year, standing at EUR 1,370, i.e., EUR 372 below the total for the economy as a whole, where remuneration increased by 6.0%.