



14 August 2023
TOURIST ACTIVITY
June 2023

REVENUE FROM TOURIST ACTIVITY INCREASED MORE THAN 30% IN THE FIRST HALF OF 2023

In **June 2023¹**, the **tourist accommodation sector²** accounted for 2.9 million guests (+7.1%)³ and 7.4 million overnight stays (+3.7%), corresponding to EUR 622.1 million in total revenue (+14.0%) and EUR 480.6 million in revenue from accommodation (+15.5%). When compared with June 2019, there were increases of 33.5% in total revenue and 35.5% in revenue from accommodation.

The revenue per available room (RevPAR) stood at EUR 78.1 and the average daily rate (ADR) amounted to EUR 123.1 (+11.6% and +11.7% respectively). When compared to June 2019, the RevPAR increased by 25.8% and the ADR grew by 26.1%. In AM Lisboa and Norte, ADR reached new historical highs (EUR 152.6 and EUR 113.0, respectively).

In June, among the municipalities with the highest representation in total overnight stays, Albufeira kept short of the 2019 levels (-10.2% in total; -26.6% in residents and -5.2% in non-residents). Vila Nova de Gaia and Porto stood out, growing by 30.6% and 25.1%, respectively, when compared to 2019.

In the first half of 2023, total overnight stays grew by 18.8% (+7.7% in residents and +24.2% in non-residents), which corresponded to increases of 31.8% in total revenue and 34.0% in revenue from accommodation (+38.3% and +41.7%, respectively, when compared with the same period in 2019).

When considering **all means of accommodation** (tourist accommodation establishments, camping and holiday camps and youth hostels), in the first half of 2023, there were 14.5 million guests and 36.7 million overnight stays registered, corresponding to increases of 20.9% and 18.7%, respectively. When compared with the same period in 2019, overnight stays increased by 11.0% (+11.6% concerning residents and +10.7% regarding non-residents).

This press release includes an analysis of the evolution of overnight stays in the first half of 2023, compared to the same period in 2019, especially those generated by foreign markets. It is the first time since the beginning of the pandemic that the number of overnight stays (total and non-residents) in the first half of the year

¹ Statistics Portugal released, on the 31st of July, the [Tourism activity flash estimate: June 2023](#), which includes the main indicators (guests, overnight stays, breakdown by residents, non-residents, main countries and occupancy rates). In this press release, some of these indicators are presented with a greater geographical breakdown, and the remaining indicators usually published on a monthly basis are disseminated - namely revenue, RevPAR, and ADR - and information on most types of accommodation (including camping and holiday camps and youth hostels) is presented.

² Monthly series which includes 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 rural areas and lodging tourism.

³ Unless stated otherwise, the rates of change presented in this press release correspond to year-on-year rates of change compared to the same period of the previous year.



exceeds the 2019 levels. Only the Algarve recorded decreases, both in overnight stays from residents (-3.1%) and from non-residents (-0.3%).

Table 1. Global results of the tourist accommodation sector

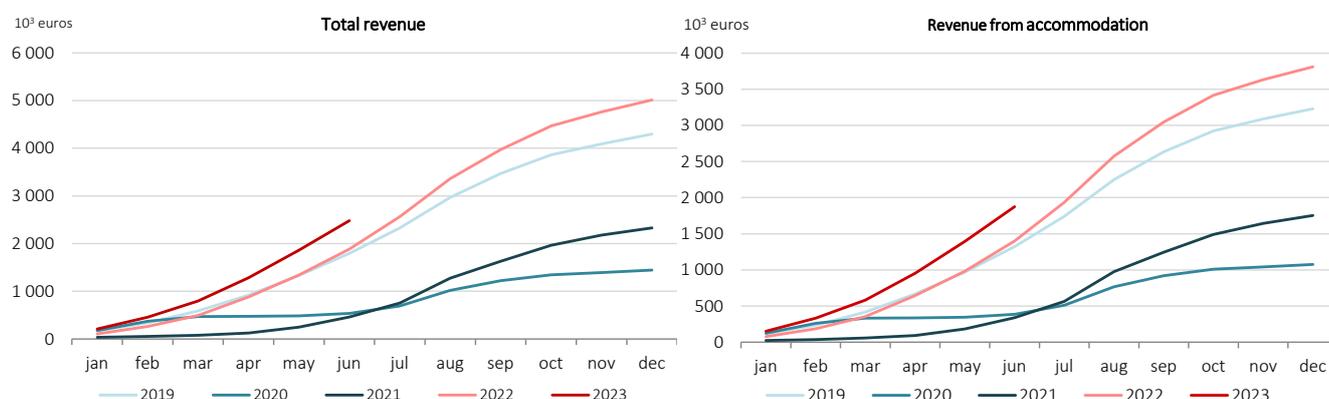
Tourist accommodation establishments	Unit	May 2023		June 2023		Jan - Jun 23	
		Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)	Value	Year-on-year change rate (%)
Guests	10³	2 843.4	12.2	2 859.1	7.1	13 597.3	21.3
Residents in Portugal	"	965.8	1.7	1 070.3	-1.6	5 397.8	10.1
Residents abroad	"	1 877.6	18.5	1 788.8	13.0	8 199.5	30.0
Overnight stays	10³	7 144.7	9.9	7 448.3	3.7	33 997.9	18.8
Residents in Portugal	"	1 779.8	0.0	2 172.4	-6.7	9 991.8	7.7
Residents abroad	"	5 364.9	13.7	5 275.9	8.7	24 006.1	24.2
Average stay	no. of nights	2.51	-2.0	2.61	-3.1	2.50	-2.0
Residents in Portugal	"	1.84	-1.7	2.03	-5.2	1.85	-2.1
Residents abroad	"	2.86	-4.1	2.95	-3.8	2.93	-4.5
Net bed occupancy rate	%	50.2	1.9 p.p.	53.0	-0.6 p.p.	43.9	4.4 p.p.
Net bedroom occupancy rate	%	62.1	3.3 p.p.	63.5	0.0 p.p.	53.9	6.1 p.p.
Total revenue	EUR 10 ⁶	574.6	25.9	622.1	14.0	2 482.2	31.8
Revenue from accommodation	"	438.3	29.5	480.6	15.5	1 874.2	34.0
RevPAR (Average revenue per available room)	EUR	70.0	24.1	78.1	11.6	54.7	26.8
ADR (Average Daily Rate)	"	112.7	17.5	123.1	11.7	101.5	12.4

Revenue increases above 30% in the 1st half of 2023

Total revenue increased by 14.0% (+25.9% in May), reaching EUR 622.1 million, and revenue from accommodation grew by 15.5% (+29.5% in May) to EUR 480.6 million. When compared to June 2019, there were increases of 33.5% in total revenue and 35.5% in revenue from accommodation.

In the **1st half of 2023**, total revenue increased by 31.8% and revenue from accommodation grew by 34.0%. When compared to the same period in 2019, there were increases of 38.3% and 41.7%, respectively. In this period, the total revenue amounted to EUR 2.5 billion and revenue from accommodation reached EUR 1.9 billion.

Figure 1. Total revenue and revenue from accommodation in tourist accommodation establishments, by month – cumulative sum





In June, AM Lisboa accounted for 30.8% of total revenue and 32.3% of revenue from accommodation, followed by Algarve (29.9% and 28.7%, respectively), Norte (15.5% and 16.1%, in the same order,) and RA Madeira (9.5% and 8.7%, respectively).

The largest increases occurred in RA Açores (+23.7% in total revenue and +25.2% in revenue from accommodation), Norte (+22.4% and +23.7%, respectively), AM Lisboa (+18.2% and +19.2%, in the same order) and Centro (+16.9% in both). When compared to June 2019, the rates of change in RA Açores (+57.6% in total revenue and +58.7% in revenue from accommodation), RA Madeira (+51.3% and +67.9%, respectively), Norte (+42.9% and +43.4%, in the same order) and Alentejo (+38.9% and +47.3%, respectively) stood out.

In **the first half of 2023**, RA Açores (+53.8% in total revenue and +54.3% in revenue from accommodation), RA Madeira (+52.8% and +64.3%, respectively) and Alentejo (+47.5% and +54.9%, in the same order) recorded the highest revenue growth, compared to the same period in 2019.

Table 2. Revenue in tourist accommodation establishments,
by NUTS II regions

NUTS II	Total revenue				Revenue from accommodation			
	Jun 23		Jan - Jun 23		Jun 23		Jan - Jun 23	
	EUR 10 ⁶	Y-o-y change rate (%)	EUR 10 ⁶	Y-o-y change rate (%)	EUR 10 ⁶	Y-o-y change rate (%)	EUR 10 ⁶	Y-o-y change rate (%)
Portugal	622.1	14.0	2 482.2	31.8	480.6	15.5	1 874.2	34.0
Norte	96.7	22.4	404.2	35.7	77.2	23.7	315.3	37.5
Centro	41.0	16.9	185.3	27.5	30.3	16.9	135.9	28.1
AM Lisboa	191.4	18.2	856.4	41.9	155.3	19.2	685.9	44.3
Alentejo	25.1	3.1	99.7	18.0	19.9	6.5	75.1	20.0
Algarve	186.1	7.1	570.5	19.4	137.9	8.0	399.4	19.4
RA Açores	22.7	23.7	72.7	34.5	18.3	25.2	55.3	35.3
RA Madeira	59.1	11.1	293.4	33.1	41.7	14.5	207.3	37.9

In June, revenue evolved positively in all three accommodation segments. In hotel establishments, the total revenue and the revenue from accommodation (shares of 87.2% and 85.3% in total tourism accommodation) increased by 13.1% and 14.5%, respectively. Compared to June 2019, there were increases of 31.3% and 33.0%, in the same order.

Local accommodation establishments (shares of 9.1% and 10.8%, respectively) registered increases of 22.8% in total revenue and 24.4% in revenue from accommodation. Compared to June 2019, there were increases of 40.4% and 43.2%, respectively.

In tourism in rural areas and lodging tourism (representing 3.7% and 3.9%, respectively) there were increases of 14.8% and 14.9%, in the same order. Compared to June 2019, the increases were more significant at +85.2% and +83.5%, respectively.



Table 3. Revenue in tourist accommodation establishments,
by segment and by type

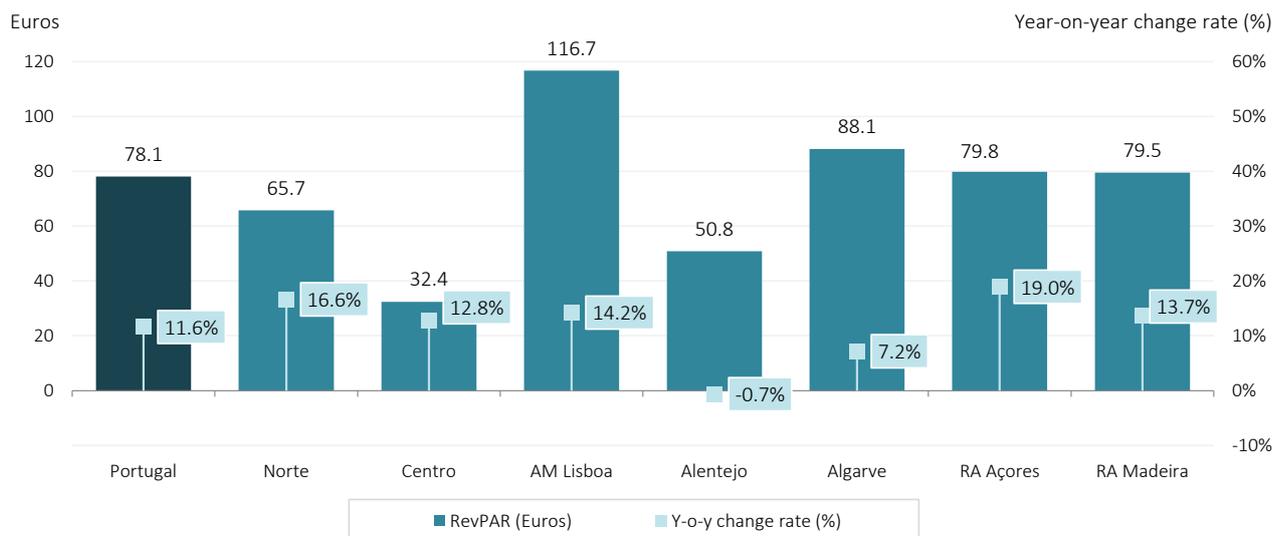
Type of establishment	Total revenue				Revenue from accommodation			
	Jun 23		Jan - Jun 23		Jun 23		Jan - Jun 23	
	EUR 10 ⁶	Y-o-y change rate (%)	EUR 10 ⁶	Y-o-y change rate (%)	EUR 10 ⁶	Y-o-y change rate (%)	EUR 10 ⁶	Y-o-y change rate (%)
Total	622.1	14.0	2 482.2	31.8	480.6	15.5	1 874.2	34.0
Hotels and similar	542.2	13.1	2 170.0	31.3	410.1	14.5	1 602.6	33.5
Hotels	420.3	14.9	1 743.8	33.7	316.5	16.2	1 288.8	36.2
Apartment hotels	64.1	7.1	225.9	23.9	48.3	8.9	161.8	24.8
Pousadas and quintas da Madeira	9.3	5.8	42.4	19.9	6.8	9.3	30.0	22.0
Tourist apartments	29.8	14.8	93.1	27.8	25.1	14.6	77.6	28.3
Tourist villages	18.6	-1.3	64.8	12.2	13.3	1.3	44.4	12.1
Local accommodation	56.7	22.8	226.8	40.1	52.0	24.4	205.7	42.1
Tourism in rural areas and lodging tourism	23.2	14.8	85.4	23.2	18.6	14.9	65.9	23.5

The average daily rate reached once again historical highs in AM Lisboa and Norte

When considering all the tourist accommodation establishments, the revenue per available room (RevPAR) amounted to EUR 78.1 in June 2023, having increased by 11.6%, compared to the same month in 2022 (+24.1% in May), and 25.8%, when compared to June 2019.

The highest RevPAR values were recorded in AM Lisboa (EUR 116.7) and Algarve (EUR 88.1). The largest increases occurred in RA Açores and Norte (+19.0% and +16.6%, respectively).

Figure 2. Revenue per available room (RevPAR) in tourist accommodation establishments,
by NUTS II regions



In June, this indicator increased by 12.5% in hotel establishments (+25.2% in May), 13.4% in local accommodation (+26.3% in May) and 5.7% in tourism in rural areas and lodging tourism (+12.5% in May).



Table 4. Revenue per available room (RevPAR) in tourist accommodation establishments,
by type and category

Type of establishment and category	RevPAR (€)			Year-on-year change rate (%)	
	May 23	Jun 23	Jan - Jun 23	Jun 23	Jan - Jun 23
Total	70.0	78.1	54.7	11.6	26.8
Hotels and similar	78.1	87.9	60.5	12.5	28.2
Hotels	84.7	90.9	64.1	13.4	30.1
*****	143.5	162.2	109.0	12.1	26.0
****	79.3	84.0	60.3	10.6	30.0
***	60.0	60.2	45.4	16.9	34.4
** / *	46.8	49.3	37.0	20.3	34.4
Apartment hotels	72.1	97.5	59.9	8.7	20.4
*****	124.8	170.4	101.8	-5.3	3.9
****	65.5	88.1	54.2	11.0	25.5
*** / **	41.7	57.9	38.3	19.4	23.7
Pousadas and quintas da Madeira	113.2	113.5	86.3	7.8	21.6
Tourist apartments	44.7	64.7	38.9	14.6	24.7
Tourist villages	41.6	56.4	32.9	3.4	12.4
Local accommodation	45.6	49.2	36.8	13.4	28.0
Tourism in rural areas and lodging tourism	36.9	42.9	30.1	5.7	10.0

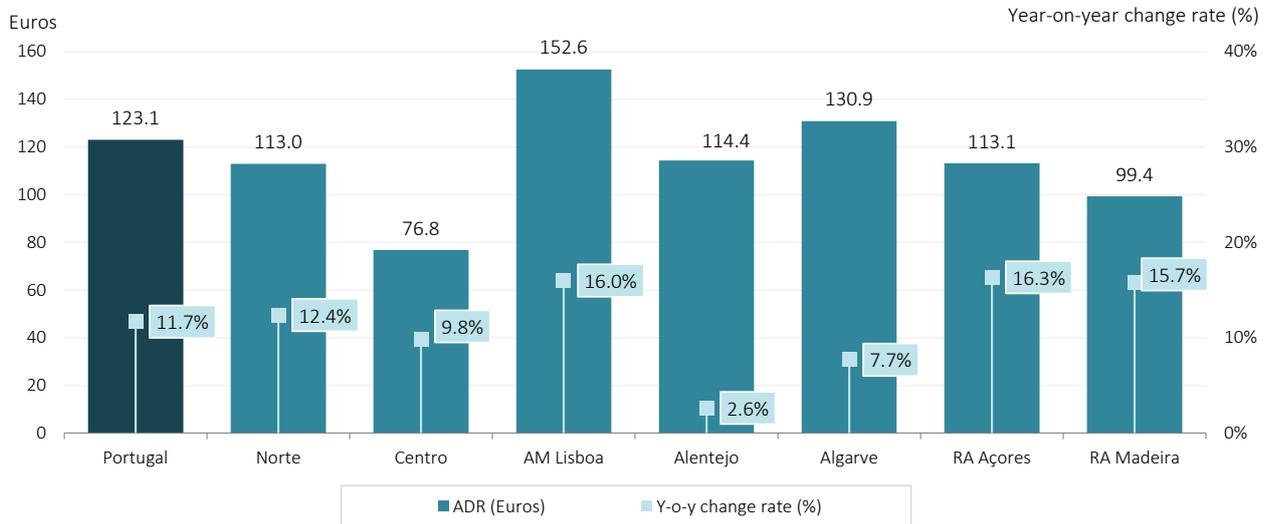
When considering total tourist accommodation establishments, the average daily rate (ADR) amounted to EUR 123.1 in June, +11.7% when compared to the same month in 2022 (+17.5% in May) and +26.1% compared to June 2019.

AM Lisboa recorded the highest ADR value (EUR 152.6), reaching a new historical high in the region, in the entire series available. It was followed by Algarve (EUR 130.9) and Alentejo (EUR 114.4). Norte also registered a new historical high in the whole available series (EUR 113.0).

The most significant increases were in RA Açores and AM Lisboa regions (+16.3% and +16.0%, respectively).



Figure 3. Average daily rate (ADR) in tourist accommodation establishments,
by NUTS II regions



In June, the ADR increased by 12.0% in hotel establishments (+17.5% in May), 13.8% in local accommodation (+22.0% in May) and 4.7% in tourism in rural areas and lodging tourism (+8.8% in May).

Table 5. Average daily rate (ADR) in tourist accommodation establishments,
by type and category

Type of establishment and category	ADR (€)			Year-on-year change rate (%)	
	May 23	Jun 23	Jan - Jun 23	Jun 23	Jan - Jun 23
Total	112.7	123.1	101.5	11.7	12.4
Hotels and similar	115.5	127.3	104.0	12.0	12.0
Hotels	119.7	128.5	106.9	12.4	12.4
*****	207.1	229.5	189.5	13.8	11.4
****	106.5	113.1	96.3	8.7	10.3
***	86.8	88.6	76.2	16.4	16.9
** / *	77.4	81.5	70.4	18.0	19.6
Apartment hotels	102.9	131.1	96.6	9.7	10.3
*****	199.1	230.0	179.8	-8.9	0.3
****	91.8	118.4	87.9	12.3	13.7
** / **	57.5	77.6	54.7	24.4	13.6
Pousadas and quintas da Madeira	173.2	167.2	151.6	12.7	13.7
Tourist apartments	85.9	107.7	81.3	14.6	10.8
Tourist villages	95.9	114.4	83.3	6.4	5.3
Local accommodation	93.5	98.2	83.6	13.8	17.9
Tourism in rural areas and lodging tourism	116.6	120.7	109.9	4.7	6.6



Overnight stays in Albufeira decreased in the 1st half of 2023, mainly by residents.

In June 2023, there were 2.9 million guests (+7.1%) and 7.4 million overnight stays (+3.7%) in tourist accommodation establishments, of which 74.1% were concentrated in the 23 main municipalities⁴.

Table 6. Overnight stays in tourist accommodation establishments, by NUTS II regions

Unit: 10³

NUTS II	Overnight stays from residents				Overnight stays from non residents			
	Jun 23		Jan - Jun 23		Jun 23		Jan - Jun 23	
	Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)
Portugal	2 172.4	-6.7	9 991.8	7.7	5 275.9	8.7	24 006.1	24.2
Norte	442.2	0.7	2 214.4	8.7	777.9	15.9	3 594.9	33.8
Centro	392.0	-2.6	1 980.9	8.0	313.4	21.2	1 341.1	34.0
AM Lisboa	358.4	-4.3	2 018.2	10.4	1 467.0	6.5	7 471.8	28.2
Alentejo	220.5	-1.2	920.4	9.2	101.0	9.9	472.6	21.9
Algarve	512.9	-14.3	1 633.5	2.4	1 748.7	7.0	6 873.5	16.1
RA Açores	101.6	-10.7	525.7	2.6	196.5	14.5	601.3	27.3
RA Madeira	144.7	-17.5	698.7	12.1	671.3	3.7	3 650.9	20.2

The municipality of Lisboa accounted for 18.0% of the total overnight stays in June 2023 (8.5% of total overnight stays of residents and 21.9% of non-residents), reaching 1.3 million overnight stays. When compared to June 2019, the number of overnight stays increased by 5.3% (-9.7% concerning residents and +8.2% regarding non-residents).

Albufeira still ranked 2nd (share of 12.2%), having registered 907.8 thousand overnight stays, but not reaching the levels seen in 2019 (-10.2% in total; -26.6% in residents and -5.2% in non-residents).

In Porto, there were 536.4 thousand overnight stays (7.2% of the total), 25.1% more when compared to June 2019 (+31.7% regarding residents and +23.9% concerning non-residents).

Funchal accounted for 532.3 thousand overnight stays (share of 7.1%), having increased by 17.2% (+54.9% regarding residents and +12.3% concerning non-residents) when compared to June 2019.

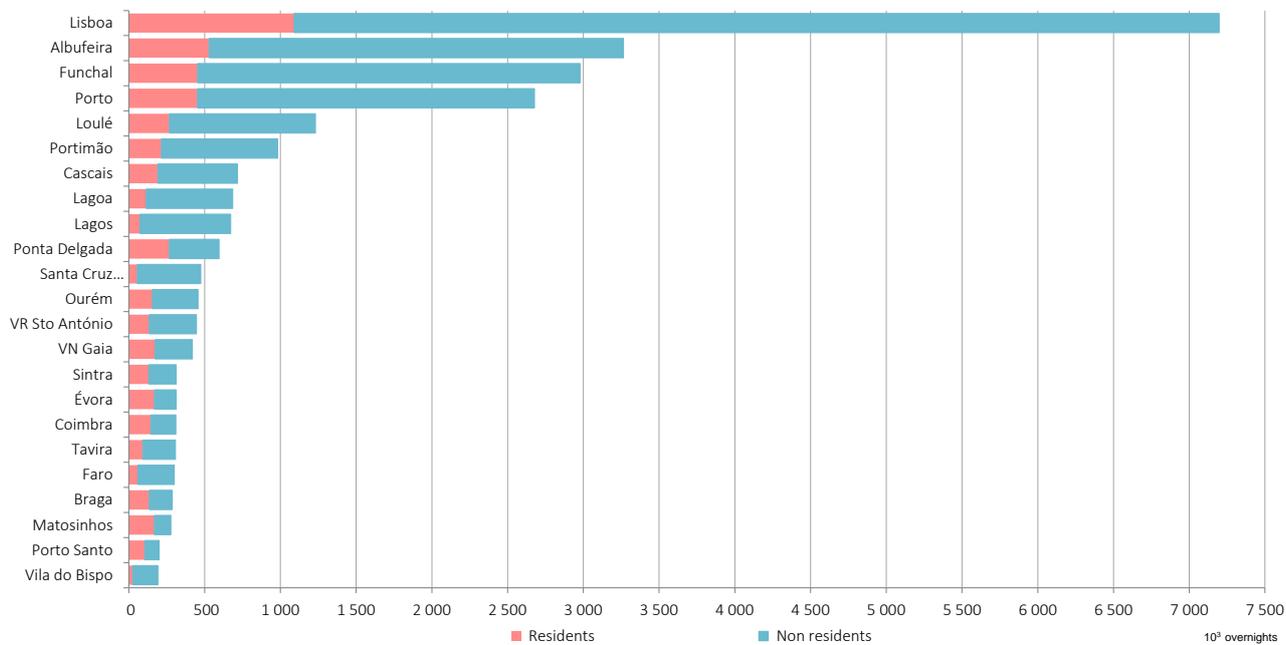
Among the main municipalities, the increases recorded in Vila Nova de Gaia (+30.6%) and Matosinhos (+14.1%) in June, compared to the same month of 2019, also stood out.

In the 1st half of 2023, compared to the same period in 2019, amongst the main municipalities, Porto stood out with a 29.4% growth (+19.8% in residents and +31.6% in non-residents), followed by Vila Nova de Gaia (+29.3%; +21.3% in residents and +35.5% in non-residents). Conversely, the largest decreases occurred in Vila Real de Santo António (-13.7%; -7.6% in residents and -16.1% in non-residents) and Albufeira (-8.5%; -17.1% concerning residents and -6.7% regarding non-residents).

⁴ The selection of the main municipalities is based on the results of overnight stays for 2022.



Figure 4. Overnight stays in tourist accommodation establishments
by main municipalities, January-June 2023





Accommodation Activity – overview

In the 1st half of 2023, when considering the **whole set of means of accommodation** (tourist accommodation establishments, camping sites and holiday camps and youth hostels), there were 14.5 million guests and 36.7 million overnight stays, corresponding to increases of 20.9% and 18.7%, respectively. When compared to the same period in 2019, overnight stays increased by 11.0% (+11.6% concerning residents and +10.7% regarding non-residents). In the whole set of accommodation establishments, the average stay (2.53 nights) decreased by 1.9% (-1.7% concerning residents and -4.3% regarding non-residents).

Table 7. Main indicators of accommodation activity

	Unit	Total				Residents				Non residents			
		Jun 23		Jan - Jun 23		Jun 23		Jan - Jun 23		Jun 23		Jan - Jun 23	
		Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)	Value	Y-o-y change rate (%)
Guests													
Total	10 ³	3092.3	6.0	14525.1	20.9	1203.2	-2.8	5851.3	9.7	1889.1	12.6	8673.8	29.9
Tourist accommodation establishments	"	2859.1	7.1	13597.3	21.3	1070.3	-1.6	5397.8	10.1	1788.8	13.0	8199.5	30.0
Camping sites	"	195.4	-8.0	771.5	13.7	107.8	-16.4	351.6	1.7	87.6	4.9	419.9	26.2
Holiday camps and youth hostels	"	37.8	15.3	156.4	29.1	25.1	14.4	102.0	22.8	12.7	17.0	54.4	42.9
Overnight stays													
Total	10 ³	8124.4	3.4	36718.7	18.7	2595.9	-6.1	11305.3	7.8	5528.5	8.6	25413.3	24.2
Tourist accommodation establishments	"	7448.3	3.7	33997.9	18.8	2172.4	-6.7	9991.8	7.7	5275.9	8.7	24006.1	24.2
Camping sites	"	600.0	-1.8	2399.5	14.9	373.8	-5.1	1114.7	6.4	226.2	4.1	1284.8	23.4
Holiday camps and youth hostels	"	76.1	14.9	321.3	31.8	49.7	12.7	198.8	21.6	26.4	19.5	122.4	52.7
Average stay													
Total	no. Nights	2.63	-2.5	2.53	-1.9	2.16	-3.4	1.93	-1.7	2.93	-3.6	2.93	-4.3
Tourist accommodation establishments	"	2.61	-3.1	2.50	-2.0	2.03	-5.2	1.85	-2.1	2.95	-3.8	2.93	-4.5
Camping sites	"	3.07	6.7	3.11	1.0	3.47	13.5	3.17	4.7	2.58	-0.8	3.06	-2.2
Holiday camps and youth hostels	"	2.01	-0.3	2.05	2.1	1.98	-1.5	1.95	-1.0	2.08	2.1	2.25	6.8

Overnight stays grew in all means of accommodation in the 1st half of 2023

When considering the first half of 2023, the **tourist accommodation establishments** hosted 13.6 million guests (+21.3%) that spent 34.0 million overnight stays (+18.8%). Overnight stays of residents increased by 7.7% and those of non-residents grew by 24.2%. In comparison with the same period in 2019, the number of overnight stays increased by 10.7% (+13.2% concerning residents and +9.6% regarding non-residents). The average stay (2.50 nights) decreased by 2.0% compared to the same period in 2022.

The **camping sites** registered 771.5 thousand campers and 2.4 million overnight stays in the 1st half of 2023, corresponding to increases of 13.7% and 14.9%, respectively. Overnight stays spent by residents increased by 6.4% and those of non-residents grew by 23.4%. Compared to the same period in 2019, overnight stays increased by 16.4% (+2.9% concerning residents and +31.4% regarding non-residents). The average stay (3.11 nights) increased by 1.0% vis-à-vis the 1st half of 2022.

In the 1st half of 2023, the **holiday camps and youth hostels** recorded 156.4 thousand guests (+29.1%), that spent 321.3 thousand overnight stays (+31.8%). Overnight stays spent by residents increased by 21.6% and those of non-residents grew by 52.7%. When compared to the same period in 2019, overnight stays increased by 6.8% (-7.6% concerning residents and +42.9% regarding non-residents). The average stay (2.05 nights) increased by 2.1% vis-à-vis the 1st half of 2022.



Analysis of the evolution of overnight stays in the first half of 2023, compared to the same period in 2019

Since the beginning of 2023, the 2019 levels have been surpassed, thus registering new historical highs of overnight stays in tourist accommodation establishments, having totalled 34.0 million overnight stays in the **first half of 2023** (+10.7% compared to the same period in 2019). It was the first time, since the beginning of the pandemic, that the number of overnight stays in the first half of the year exceeds the 2019 figures, after decreases of 66.2% in 2020, 73.6% in 2021 and 6.9% in 2022.

The largest increases compared to 2019 occurred in February (+19.5%), April (+14.3%) and January (+14.1%).

Figure 5. Overnight stays in tourist accommodation establishments and year-on-year rate of change, compared to 2019, by month – 1st half of 2023



The largest increases were recorded in Norte (+23.2%), RA Madeira (+21.5%), RA Açores (+15.1%) and Alentejo (+14.4%), while in Algarve there was still a slight decrease (-0.8%).

Figure 6. Year-on-year rate of change of overnight stays in tourist accommodation establishments, compared to 2019, by NUTS II regions – 1st half of 2023



In this period, overnight stays of non-residents were predominant, standing for 70.6% of the total, despite the slight decrease in representativeness (71.3% in 2019).



The domestic market grew significantly in RA Madeira

Overnight stays from the domestic market increased by 13.2% compared to the first half of 2019, a higher evolution than in 2022, when there was a 5.0% growth compared to the same period.

In all months there were increases compared to 2019, with the emphasis on the evolutions in February (+30.0%), January (+21.8%) and April (+20.8%). In June, there was a slight increase (+0.5%).

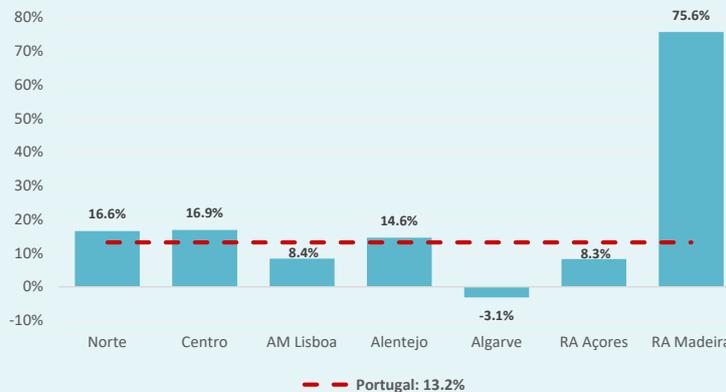
Figure 7. Overnight stays of residents in tourist accommodation establishments and year-on-year rate of change, compared to 2019, by month – 1st half of 2023



Overnight stays of residents were mainly located in Norte (22.2% of the total), AM Lisboa (20.2%), Centro (19.8%) and Algarve (16.3%).

RA Madeira stood out with a 75.6% growth compared to the first half of 2023, followed by Centro (+16.9%) and Norte (+16.6%).

Figure 8. Year-on-year rate of change of overnight stays of residents in tourist accommodation establishments, compared to 2019, by NUTS II regions – 1st half of 2023





In the 1st half of 2023, overnight stays of non-residents surpassed 2019 levels for the first time since the beginning of the pandemic

In the first half of the year, overnight stays from non-residents exceeded 24.0 million and grew by 9.6% compared to the same period in 2019 (an increase of 2.1 million overnight stays). This growth comes after 3 years of decreases compared to the first half of 2019: -71.4% in 2020; -86.0% in 2021; -11.7% in 2022.

New historical highs were recorded in all months, with an emphasis on the growth in February (+14.9%) and April (+11.8%).

Figure 9. Overnight stays of non-residents in tourist accommodation establishments and year-on-year rate of change, compared to 2019, by month – 1st half of 2023



AM Lisboa accounted for 31.1% (+0.1 p.p.) of overnight stays from non-residents in the 1st half of 2023, surpassing Algarve (28.6%; -2.9 p.p.). RA Madeira (15.2%; +0.7 p.p.) and the Norte (15.0%; +2.1 p.p.) followed.

The largest increases were observed in Norte (+27.6%), RA Açores (+21.9%), RA Madeira (+14.8%) and Alentejo (+14.2%). Algarve registered a slight decrease (-0.3%).

Figure 10. Year-on-year rate of change of overnight stays of non-residents in tourist accommodation establishments, compared to 2019, by NUTS II regions – 1st half of 2023





The top 10 inbound markets in 2019 remained the same in 2023 (based only on the analysis of the first half of the year), despite some changes in positions, accounting for 76.5% of overnight stays from non-residents (+0.1 p.p.).

The United Kingdom remained the main inbound market, accounting for 18.5% (-0.9 p.p.) of overnight stays from non-residents, followed by Germany, which continues to rank second, with 11.7% (-1.2 p.p.). The Spanish market overtook the French one and ranked third, with 8.9% of overnight stays.

In terms of market share gain, the USA stood out, shifting from 5.4% in 2019 to 8.4% of overnight stays from non-residents in 2023 (+3.0 p.p.), as a result of a 71.2% growth recorded in this period.

Germany had the largest reduction on share, from 12.9% in 2019 to 11.7% in the 1st half of 2023 (-1.2 p.p.), followed by Brazil, which represented 5.3% of overnight stays from non-residents (-1.0 p.p.).

In the first half of 2023, the growth recorded by the Israeli (+75.5%), which climbed seven positions, Canadian (+42.6%), Polish (+27.6%), and Irish (+27.4%) markets also stood out.

Conversely, the Swedish (-23.7%), Brazilian (-8.3%), Danish (-3.3%), Dutch (-0.5%), and German (-0.4%) markets decreased.

Table 8. Performance of the main inbound markets of overnight stays of non-residents in tourist accommodation establishments, by NUTS II regions – 1st half of 2023

Rank	Country	Overnight stays (10 ⁶)	Share 2023 (%)		Y-o-Y (%) 2023/19
			Country	Accumulated	
1. ^o → 0	United Kingdom	4 451.9	18.5%	18.5%	4.7% ↑
2. ^o → 0	Germany	2 816.6	11.7%	30.3%	-0.4% ↓
3. ^o ↑ 1	Spain	2 146.2	8.9%	39.2%	10.8% ↑
4. ^o ↓ -1	France	2 109.5	8.8%	48.0%	0.8% ↑
5. ^o ↑ 1	USA	2 012.1	8.4%	56.4%	71.2% ↑
6. ^o ↓ -1	Brazil	1 266.0	5.3%	61.7%	-8.3% ↓
7. ^o → 0	Netherlands	1 108.7	4.6%	66.3%	-0.5% ↓
8. ^o → 0	Ireland	965.2	4.0%	70.3%	27.4% ↑
9. ^o → 0	Italy	823.0	3.4%	73.7%	14.1% ↑
10. ^o → 0	Canada	663.9	2.8%	76.5%	42.6% ↑
11. ^o ↑ 1	Poland	520.2	2.2%	78.7%	27.6% ↑
12. ^o ↓ -1	Belgium	481.7	2.0%	80.7%	8.5% ↑
13. ^o → 0	Switzerland	444.5	1.9%	82.5%	14.5% ↑
14. ^o → 0	Sweden	277.7	1.2%	83.7%	-23.7% ↓
15. ^o ↑ 1	Denmark	276.1	1.2%	84.8%	-3.3% ↓
16. ^o ↑ 1	Austria	242.8	1.0%	85.8%	8.9% ↑
17. ^o ↑ 7	Israel	199.7	0.8%	86.7%	75.5% ↑



EXPLANATORY NOTES

In 2020, in the context of the COVID-19 pandemic, Statistics Portugal started to release a flash estimate of tourism activity, anticipating, by 15 days, the dissemination of data on guests and overnight stays in tourist accommodation establishments. The revisions occurring with the publication of later results have not been significant, so from the release of January 2021 data, Statistics Portugal anticipated, by 15 days, the dissemination of preliminary data on tourism activity, thus releasing flash statistics (at 30 days).

With the flash statistics, the main indicators are disclosed (guests, overnight stays, with a breakdown by residents and non-residents, and main countries and occupancy rates). The dissemination of results at 45 days is kept, with a greater geographical breakdown, with the remaining indicators - namely revenue, RevPAR, and ADR - and considering the information on most types of accommodation (including camping and holiday camps and youth hostels).

The sources used in this press release are the Survey on guest stays in hotel establishments and other accommodations, the Survey on guest stays in camping sites, and the Survey on guest stays in holiday camps and youth hostels.

Data made available in this press release relates to establishments operating in each reference period, considering:

- 2023 – January to May: provisional results; 2023 - June: preliminary results.

In between preliminary, provisional, and final data, results are revised due to definitive answers instead of provisional and mainly due to the replacement of non-response estimates with effective responses. These effective responses include situations of suspended activity (seasonal, temporarily for other reasons, or definitive) not duly reported, resulting in the substitution of estimates by a null result, a situation with higher occurrence during the low season.

Guest – individual that spends at least one overnight stay in a tourist accommodation establishment.

Overnight stay – time spent by an individual between midday and midday of the following day.

Average stay – relation between the number of overnight stays and the number of guests that originated those overnight stays during the reference period.

Total revenue – revenue from the activity of tourist accommodation establishments: room renting, food and beverage, and others related to the activity itself (assignment of spaces, laundry, tobacco, communications, etc.).

Revenue from accommodation – revenue from overnight stays spent by guests in all tourist accommodation establishments.

RevPAR – revenue per available room, measured by the relation between revenue from accommodation and the number of available rooms, in the reference period.

ADR – average daily rate, measured by the relation between revenue from accommodation and the number of occupied rooms in the reference period.

Hotels and similar – include hotels, apartment hotels, “pousadas”, “quintas da Madeira”, tourist apartments, and tourist villages.

Local accommodation – establishments that provide temporary accommodation services for remuneration but do not meet the requirements to be considered tourist facilities, and may take the form of guest houses, apartments, and



lodging establishments (including hostels). Note: Includes pensions, motels, and inns previously classified as other tourist accommodations. Only local accommodation establishments with 10 or more beds are considered according to the statistical threshold set in EU Regulation 692/2011.

Rural tourist – establishments that provide accommodation services to tourists in rural areas, providing an adequate set of facilities, structures, equipment, and complementary services, preserving, and enhancing the architectural, historical, and natural legacies of the respective region.

Lodging tourist – establishments of a family nature, located in private real estate, namely palaces, and mansions, depending on their architectural, historical, or artistic value, both in rural and urban areas.

Quinta da Madeira – establishment located in one or more preexisting buildings, with characteristics and architectural, patrimonial, and cultural value alluding to the historical past of Madeira.

Campsites – a collective, fenced-off facility for tents, caravans, trailers, and mobile homes.

Holiday camp – a holiday complex with appropriate facilities for providing free or low-cost holidays, usually as a social service by public or private entities.

Youth hostel – a non-profit establishment providing accommodation for young people or small groups of young people.

Year-on-year rates of change – comparison between the variable level in the reference period and the same period of the year before. The calculation of year-on-year rates of change for the main indicators is based on values in units, although in this press release, they are visible only in thousands.

To simplify the language, the term “foreigner” might be used instead of “non-resident”.

INFORMATION MADE AVAILABLE

With this press release, in addition to the files attached to the press itself, the following indicators are made available on Statistics Portugal's website:

[Guests \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Segment \(tourist accommodation establishment\); Monthly](#)

[Nights \(No.\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Segment \(tourist accommodation establishment\); Monthly](#)

[Total incomes \(€\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Type \(tourist accommodation establishment\); Monthly](#)

[Lodging incomes \(€\) in tourist accommodation establishments by Geographic localization \(NUTS - 2013\) and Type \(tourist accommodation establishment\); Monthly](#)

Further statistical information on Tourism can be found on the [Statistics Portugal website](#).

Date of next flash statistics – 31st August 2023

Date of next press release – 14th September 2023
