

Tourism Barometer



Context

The survey period for the 74th edition of the IPDT Tourism Barometer took place between June 30 and July 9, 2025, achieving a response rate of 34%.

This edition comes at a time of intense activity for the sector, marked by a high season with strong demand and a dynamic political-institutional context in both Europe and Portugal. The analyses conducted provide insight into the confidence levels of professionals, as well as their expectations for the summer and the second half of the year.

The results reveal sustained confidence in tourism, with one of the highest confidence levels recorded since this indicator was first launched in 2010. Particular emphasis is placed on the dynamism of external demand and the growing attractiveness of Portugal among its main international markets.

Nevertheless, concerns remain regarding issues such as climate instability, critical infrastructure, and anti-tourism sentiment.

Looking ahead, the summer of 2025 is expected to maintain strong performance, both in the domestic market — with figures similar to the record levels of 2024 — and especially in the international market, where notable growth is anticipated in key countries such as the United Kingdom, Spain, France, the United States, and Germany. Growth is expected particularly in terms of revenue and added value of the tourism offering.

In the strategic plan, particular attention is given to the analysis of the potential of Asian markets in Portugal. Although the post-pandemic recovery has been encouraging, it still falls short of its true growth capacity. Most professionals acknowledge progress but emphasize the need for greater coordination and planning to effectively tap into this geographical axis. Direct air connectivity, specialized partnerships, and culturally tailored digital communication are identified as clear priorities to boost this growth.

This edition of the Barometer also marks the 40th anniversary of Portugal's signing of the Accession Treaty to the European Economic Community. Professionals highlight key contributions such as facilitated mobility within the Schengen Area, the adoption of the euro, and access to EU funds for urban and tourism regeneration. They also recognize the positive impact on Portugal's international image, intra-European connectivity, and the consolidation of strategic source markets.

The Barometer thus continues to monitor the evolution of the sector, identify priorities, and anticipate trends based on the insights of tourism professionals in Portugal.

Discover the full results now.



01 Tourism Trust Index



Professionals Maintain Confidence in Tourism, but Warn of Climate Risks and Anti-Tourism Sentiment.

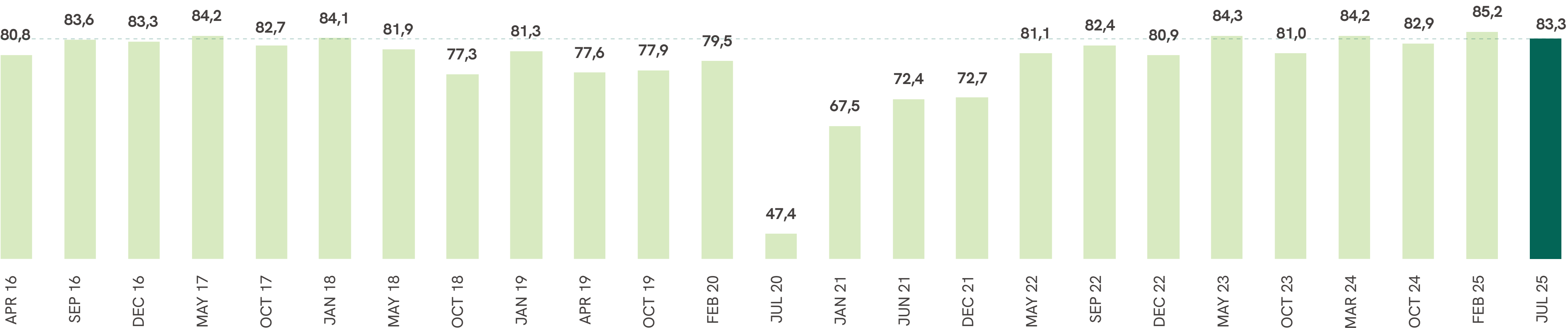
The confidence level in the tourism sector stood at 83.3 points in July 2025 — a slight decrease compared to February, yet still one of the highest figures in the historical series since its inception in 2010.

This result confirms the sector’s ongoing appeal, supported by the solid performance of key operational indicators and the perception of Portugal as a safe, attractive, and versatile destination.

However, professionals have raised several concerns that warrant close attention:

- Anti-tourism sentiment across Europe, driven by populist narratives, partially fueled by media coverage and amplified by social media;
- Unresolved critical infrastructure issues, with Lisbon Airport highlighted as a serious constraint on both competitiveness and the country’s image;
- Climate change, including rising temperatures, wildfire risks, and pressure on water resources — all of which could affect the perception of destination reliability during the summer months.

Despite these challenges, the prevailing sentiment remains one of sustained confidence, with professionals acknowledging the sector’s strong growth potential.





02

Tourism Outlook for the Second Half of 2025



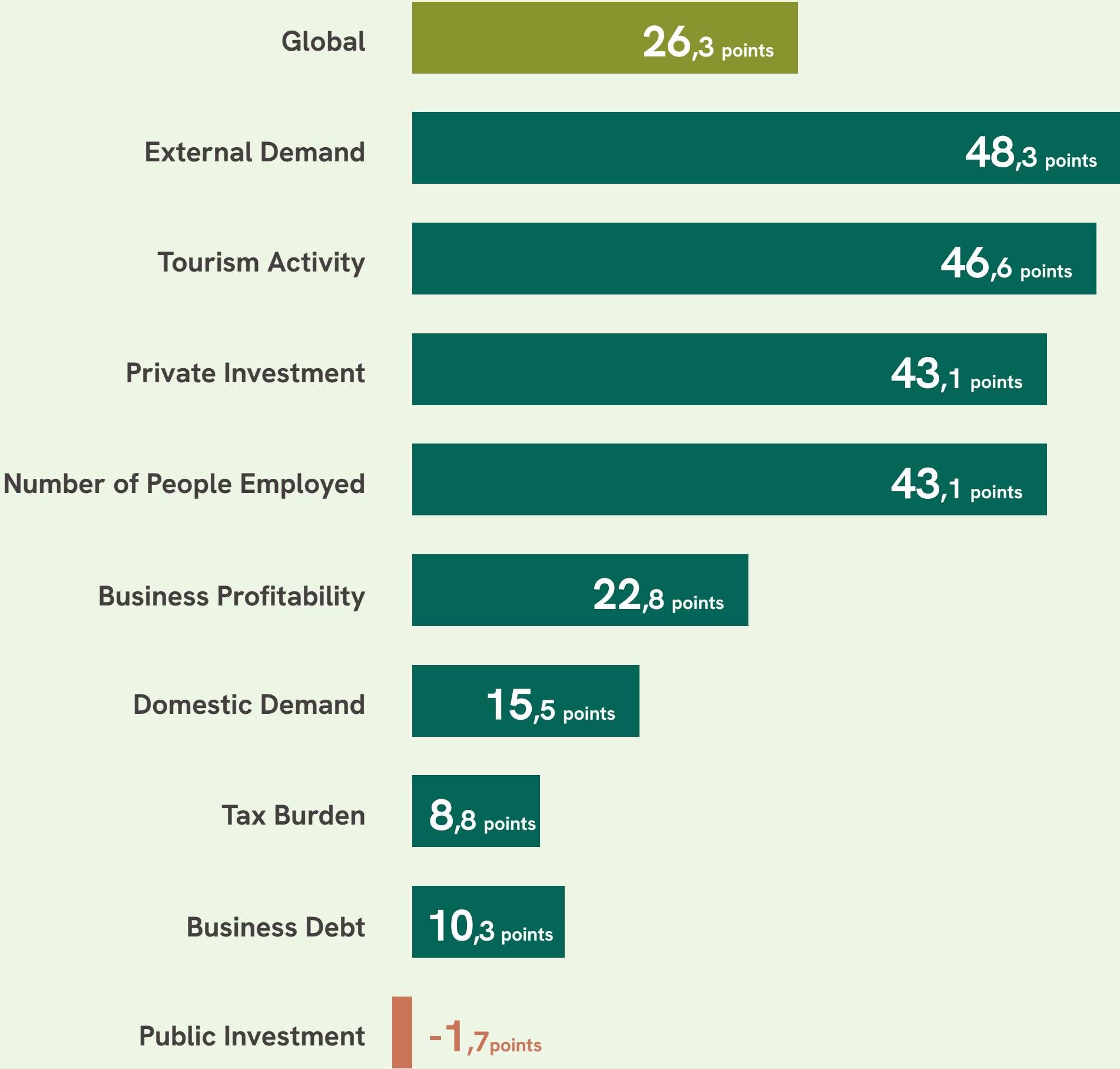
Positive Expectations for Most Indicators in the Second Half of 2025

The data points to a positive outlook for the majority of tourism indicators, with particular emphasis on external demand (48.3 points), tourism activity (46.6 points), and both private investment and employment (43.1 points each). These results reflect the sector's optimism regarding the continued momentum of international tourism and the strong performance of tourism-related economic activity.

The only indicator showing a less favorable outlook is public investment (-1.7 points). This expectation may be linked to the current political and institutional environment, marked by consecutive electoral cycles, which often delay strategic decisions and project implementation.

Domestic demand (15.5) and business profitability (22.8) recorded more moderate figures, possibly reflecting greater caution concerning the evolution of internal consumption.

Outlook for Tourism Indicators in the Second Half of 2025:





03 Outlook Summer 2025



Q.: Compared to summer 2024, what is your outlook for summer 2025 (July to September) regarding the following indicators for the domestic market?

Summer 2025 Brings Stable Expectations for the Domestic Market, Similar to the Same Period in 2024

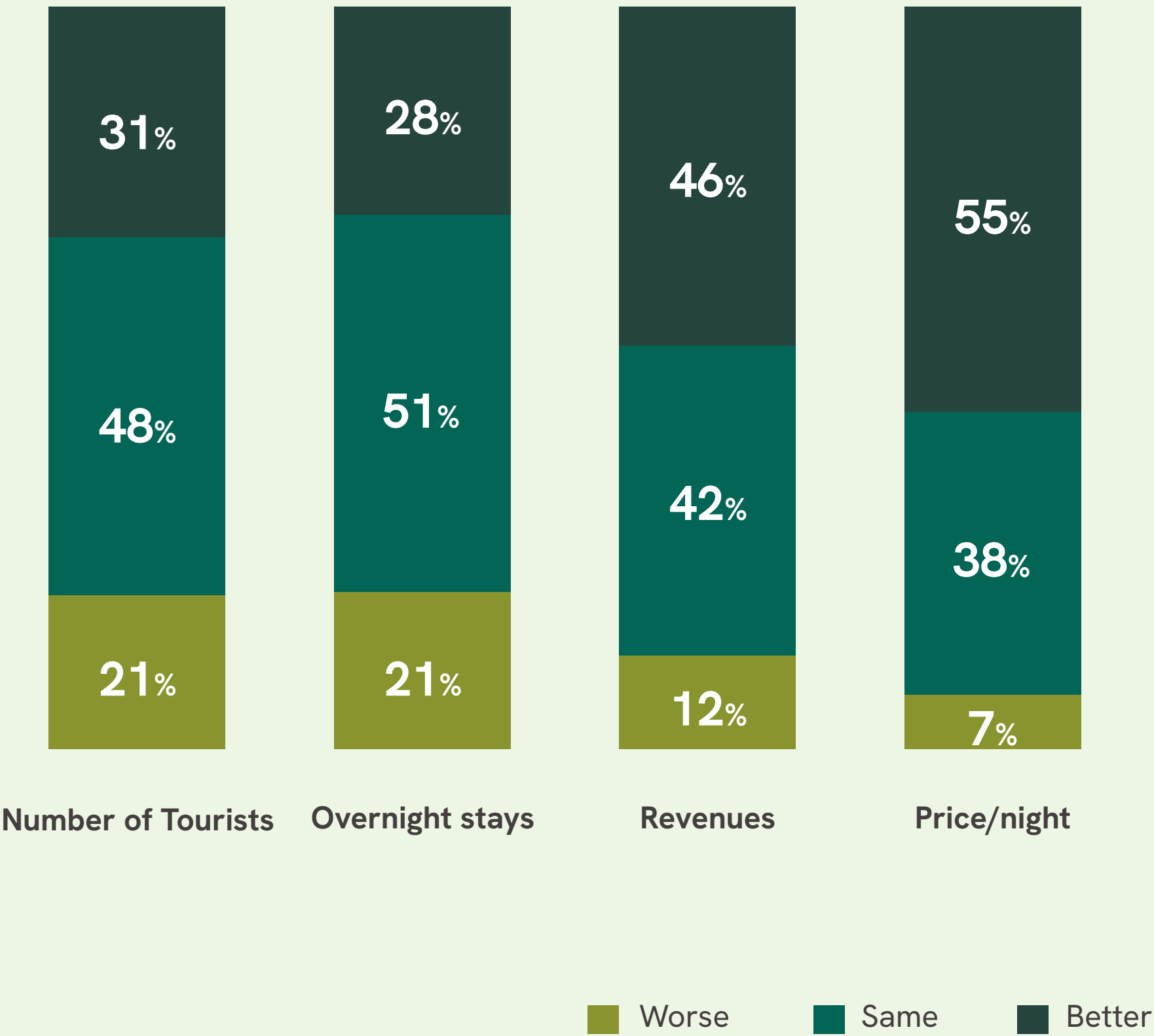
Expectations for summer 2025 regarding the domestic market point to a scenario of stability, with most professionals anticipating similar levels to those recorded in 2024 — particularly in terms of number of tourists (48%) and overnight stays (51%).

Revenues are expected to increase, although not significantly beyond 2024 figures.

However, there appears to be a potential inclination to raise the average price per night in tourist accommodations.

It’s important to highlight that maintaining internal demand at 2024 levels is in itself a positive sign, considering that last summer was one of the strongest ever in terms of volume and impact of domestic tourism.

Domestic Market



Q.: Compared to summer 2024, what is your outlook for summer 2025 (July to September) regarding the following indicators for the international market?

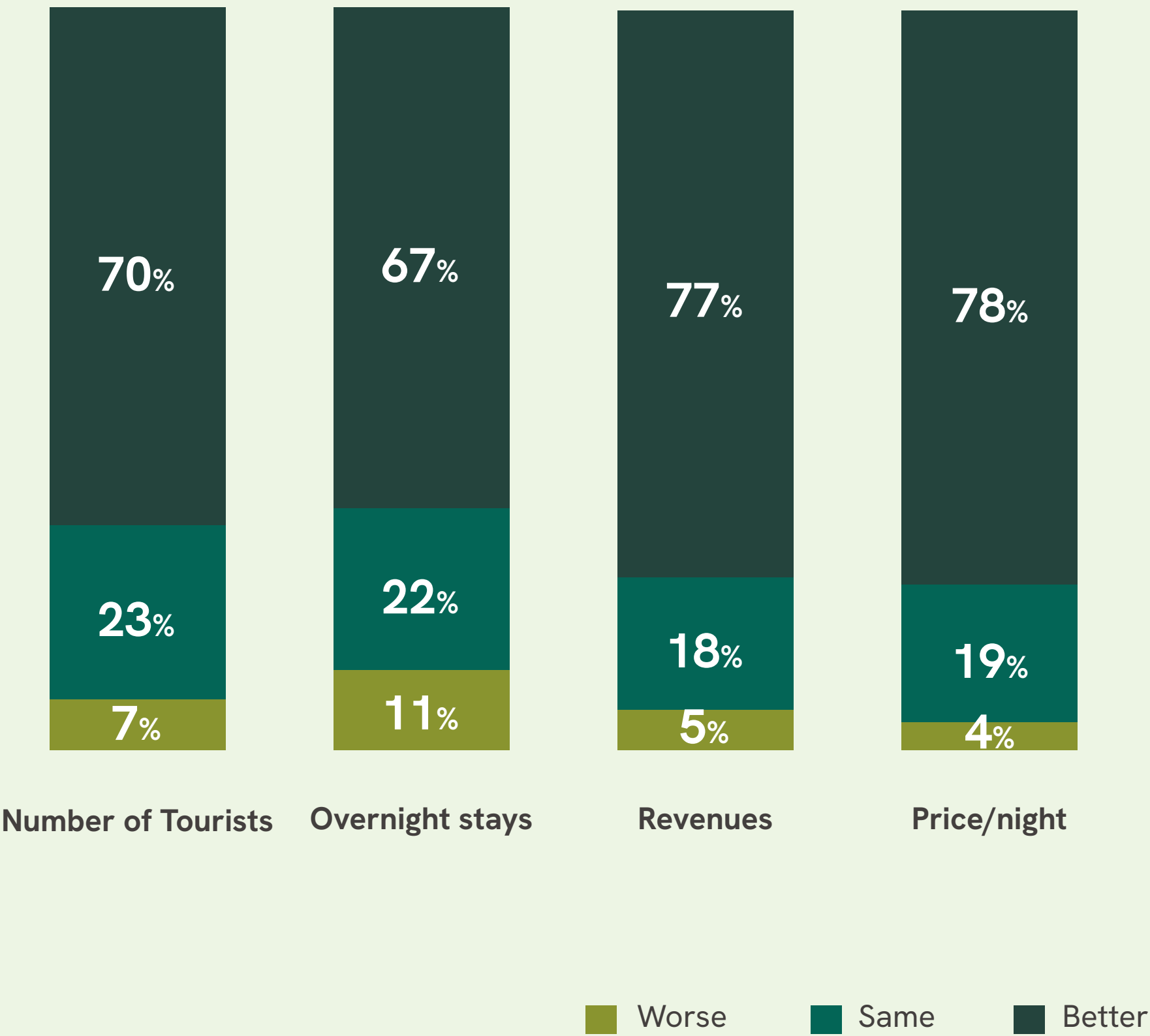
Summer 2025 with Strongly Positive Growth Expectations in the International Market

Expectations for summer 2025 in the international market remain highly positive, with the vast majority of professionals anticipating higher levels than in 2024, both in number of tourists (70%) and overnight stays (67%).

Growth expectations are even more evident in revenue (77%) and price per night (78%), reflecting strong confidence in an international demand with greater spending power and in the progressive valorization of Portugal’s tourism offer, particularly in the accommodation segment.

This outlook reinforces the key role of the international market as a driver of tourism performance in summer 2025.

International Market





Q.: What Will Be the Main International Source Markets for Summer 2025 in Portugal?

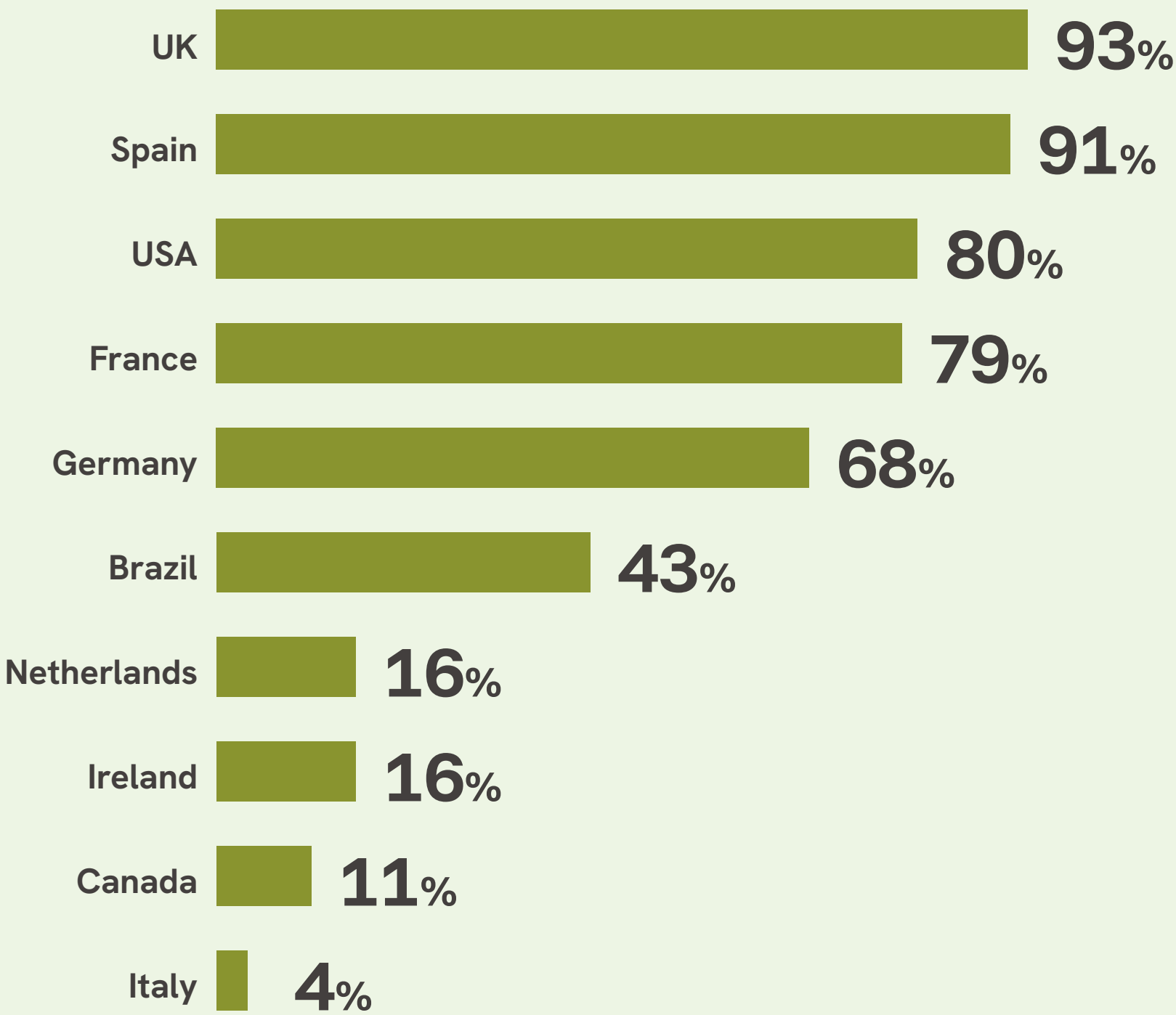
Proximity Markets and Long-Haul Strategic Markets Lead Projections for Summer 2025

Industry professionals' forecasts point to a strong concentration of international demand in five main markets:

- United Kingdom
- Spain
- France
- United States of America
- Germany

These results reinforce the importance of nearby European markets, while also consolidating the position of the U.S. as one of Portugal’s most valuable strategic markets, with growing potential in high-spending segments.

Top Markets
% Share of Total International Demand





04 Evolution of the Asian Market in Portugal

Q.: What is your opinion on how well Portugal is leveraging the potential of Asian markets?

Asian Markets Showing Positive Growth in Portugal, but Still with Significant Room for Expansion

Asian markets have been showing gradual recovery in Portugal, following their return in the post-pandemic period. The rebound is visible, with growing numbers and signs that these markets are regaining their strategic relevance.

However, industry professionals believe that Portugal is not yet fully capitalizing on this potential:

- 50% acknowledge progress but stress that there is significant room for improvement;
- 29.3% point to the lack of a coordinated strategy, noting that actions have been mostly isolated;
- 13.8% believe Portugal is not tapping into the Asian market at all.

These findings reinforce the notion that, despite positive signals, a more structured and coordinated effort is needed to position Portugal consistently in this highly competitive and strategically planned geographical axis.

Are we leveraging the full potential?

50,0%

Yes, but there is significant room for improvement.

29,3%

Partially, there are isolated actions, but no coordinated strategy.

13,8%

Não. Portugal não está a explorar o potencial deste mercado.

6,9%

Não sei responder.



Q.: In your opinion, what should be the country’s priorities to strengthen its position in the Asian market?

Air connectivity and strategic partnerships are essential for growing in Asia.

The main priority identified is the strengthening of direct air connectivity with key Asian hubs, mentioned by 76% of respondents, highlighting the importance of direct routes to increase both the volume and quality of demand from Asia.

This is followed by partnerships with tour operators, OTAs, and specialized DMCs (59%), which are essential for gaining scale and market knowledge across different source markets.

Culturally tailored communication strategies are also gaining importance, particularly:

- Active presence on the most relevant Asian social media platforms (43%);
- Development of promotional campaigns adapted to local culture and consumer habits (28%).

Finally, the simplification of visa and entry processes into Portugal (22%) is seen as an additional facilitating factor.

TOP 5 priorities
% of responses

79%	Strengthen direct air connectivity with key Asian hubs
61%	Establish partnerships with tour operators, OTAs, and specialized DMCs in Asian markets
45%	Invest in digital content and maintain an active presence on the most relevant Asian social media platforms (WeChat, Weibo, Line, KakaoTalk, etc.)
79%	Develop promotional campaigns tailored to Asian culture and consumer habits
23%	Simplify visa and entry processes for tourists coming from Asia



05 40 Years of Portugal in the European Union



Q.: On June 12, 1985, at the Jerónimos Monastery, Portugal signed the Treaty of Accession to the European Economic Community. Forty years after that moment, in your opinion, what have been the main contributions of European integration to the development of tourism in Portugal?

Greater mobility, a single currency, and access to increased EU funding have transformed tourism in Portugal.

Two structural factors stand out among the most valued contributions to tourism in Portugal: the facilitated mobility within the Schengen Area (89%) and the introduction of the euro (88%). Both have simplified travel, strengthened tourist confidence, and removed practical barriers to consumption. EU funding (89%) is also highlighted, having enabled the renovation of historic centers, the restoration of heritage sites, and the development of new infrastructure.

In addition, tourism professionals point to the strengthened image of Portugal as a safe and European destination (64%) and the increased intra-European connectivity (45%) as key factors.

Portugal’s accession to the European Union also led to stronger integration with strategic markets such as Germany, France, the Benelux countries, and Scandinavia (45%)—all of which are now central to the country's tourism performance.

What makes Portugal attractive for business tourism and events?

89%

Facilitated mobility within the Schengen Area.

89%

Access to EU funds for urban regeneration, heritage restoration, and tourism infrastructure.

88%

Adoption of the euro, which simplified transactions and increased tourist confidence.

64%

Strengthened image of Portugal as part of a safe and integrated European space.

45%

Enhanced air and rail connectivity within Europe.

45%

Entry into strong source markets (Germany, France, Benelux, Scandinavia).



Q.: Looking ahead to the coming years, what should be Portugal’s main priorities within the context of European tourism policy?

Attracting major events and investing in infrastructure are essential for the growth of the MICE sector in Portugal.

The international promotion of Portugal as a safe, accessible, and sustainable destination is identified as a priority by 70% of respondents. To enhance competitiveness, improving connectivity between peripheral regions and major European hubs also stands out (52%).

Building a more diversified and resilient tourism sector involves strengthening Portugal’s presence in cultural and nature tourism networks (46%) and increasing access to EU funds for sustainable projects (46%).

Other priorities include digital innovation in the sector (32%), European incentives for decarbonization (23%), and the exchange of best practices (18%). Additionally, 13% advocate for stronger political coordination among peripheral countries to influence European tourism policy decisions.

TOP priorities
% of responses

70%

Promote Portugal as a safe, accessible, and sustainable destination.

52%

Boost connectivity between peripheral regions and major European hubs.

46%

Strengthen Portugal’s positioning within European cultural and nature tourism networks and routes.

46%

Increase access to EU funding for sustainable tourism projects.

32%

Develop a digital innovation agenda for tourism, supported by EU funding.

23%

Advocate for the creation of a European framework of incentives for decarbonizing the sector.

18%

Promote the exchange of best practices and capacity building among European destinations.

13%

Lead an alliance of peripheral countries to advocate for fairer European tourism policies.



Tourism Barometer

Technical Sheet

UNIVERSE

174

NUMBER OF ANSWERS

58

CONSULTATION PERIOD

june 30 to july 9 of 2025

DATA PROCESSING

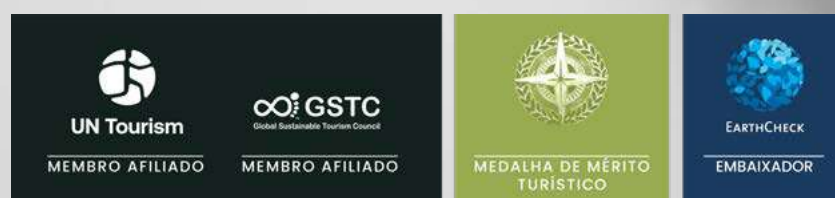
IPDT- Tourism

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july 2025



We do not conceive tourism development without a commitment to sustainability.



ABOUT IPDT®

About Us

IPDT® is recognised for its leadership in the tourism sector in Portugal, as well as for its innovation and meaningful contributions to the sustainable development of destinations and businesses.

We are a sector-specialised organisation offering an integrated service across the entire tourism value chain – from research and concept development to product design, strategic planning, implementation of action plans, and results monitoring.

In 2011, we were honoured with the Medal of Tourist Merit awarded by the Portuguese Government, in recognition of our contributions to the development of tourism.

PARTNERSHIPS AND AFFILIATIONS

We are the only private Portuguese company that is simultaneously an affiliate member of the World Tourism Organization, the Global Sustainable Tourism Council, the Advisory Board of Porto Airport, and the board of the Porto Tourism Association. We are also part of the global WHATT network, dedicated to the study of global tourism trends and their impact on the sector.

We proudly serve as EarthCheck ambassadors in Portugal – the world’s leading organisation in independently audited, science-based certification processes for the tourism industry.

OS NOSSOS VALORES

Integrated Approach

We view tourism as a complex economic and social phenomenon, which we believe must be acknowledged and valued in its true dimension.

Sustainable Development

Our projects always involve clear commitments to sustainability.

Valuing People

We advocate for tourism development models that prioritise the wellbeing of people and the places they live in.

Results-Oriented

We help businesses and tourist destinations grow and become more competitive and sustainable.

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