The Sustainable Tourism Observatory of Centro de Portugal

Observatório do Turismo Sustentável do Centro de Portugal (OTSCP)

Annual Progress Report 2024

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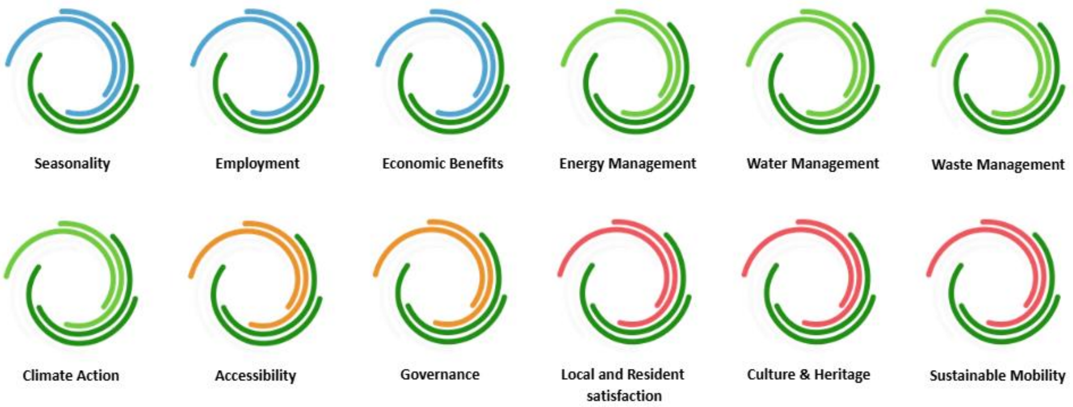
Overview

The monitoring of tourism sustainability within the scope of INSTO is organised into key thematic areas that reflect the main economic, social, environmental and governance challenges of the destination. Besides general tourism activity data, that was enriched with information about the tourism supply services, these areas include, among others, tourism seasonality, employment, the economic benefits of tourism, energy, water and waste management, climate action, accessibility, governance, resident satisfaction, as mandatory issue areas, and culture/heritage and sustainable mobility, which were included in the present edition of the report, as a reflection of the destination's characteristics.

Specific indicators are defined for each thematic area, selected on the basis of international benchmarks and adapted to the territorial context of Centro de Portugal. These indicators make it possible to monitor the evolution of tourism activity and assess its effects on the different dimensions of sustainability. As a development of the present report, each indicator is associated with the respective dimension of sustainability (economic, social/cultural, environmental or governance) and linked to the relevant Sustainable Development Goals (SDGs), ensuring methodological consistency, international comparability and alignment with INSTO principles.

This framework underpins the analysis presented in the following chapters, allowing for an integrated and systematic reading of tourism sustainability in the region.



ISSUE AREA	INDICATOR	DESCRIPTION	DIMENSIONS	TREND 23 /24	SDGS
General	0.1	Number of tourist accommodation establishments at the destination	Economic / Infrastructure	↑	8, 9
	0.2	Accommodation capacity in tourist accommodation establishments at the destination	Economic / Infrastructure	↑	
	0.3	Guests	Economic	↑	8
	0.4	Overnight stays	Economic	↑	
	0.5	Average lenght of stay	Economic	↓	
	0.6	Percentage of foreign guests	Economic / Social	↓	8, 17
	0.7	Top 10 foreign markets	Economic / Political	NA	
	0.8	Bed occupancy rate	Economic	↑	8
	0.9	Number of trips made by domestic visitors to the destination by reason for travel	Economic / Social	↓	8, 11
Seasonality	1.1	Overnight stays per month	Economic / Temporal	NA	8
	1.2	Occupancy rate per month	Economic / Temporal		
	1.3	Seasonality index	Economic / Environmental / Temporal	↑	8, 12
Employment	2.1	Population aging data	Social / Demographic	NA	3, 10, 11
	2.2	Total employment in tourism	Economic / Social	↑	8
	2.3	Percentage of jobs in tourism/total employment	Economic / Social	↑	
	2.4	Percentage of people working in tourism in the 15-44 age group	Social / Demographic	=	8, 10
	2.5	Percentage of people working in tourism with secondary or higher education	Social / Economic	↑	4, 8
	2.6	Percentage of women working in tourism	Social	↓	5, 8
	2.7	Percentage of women on governing bodies or in management	Social / Political	NA	5, 10
Economic Benefits	3.1	Total revenue from tourist accommodation	Economic	↑	8
	3.2	REVPAR	Economic	↑	
	3.3	Average Daily Rate (ADR)	Economic	↑	
	3.4	Breakdown of revenue by company type	Economic	NA	8, 10
Energy Management	4.1	GHG Emissions by Energy Source	Environmental		13
	4.2	Percentage of tourist accommodation that optimizes energy consumption	Environmental / Economic	↑	7, 12, 13
Water Management	5.1	Percentage of tourist accommodation that optimizes water consumption	Environmental / Economic	↓	6, 12
	5.2	Bathing waters considered good or excellent	Environmental / Social	↓	6, 14
Waste Water Management	6.1	Volume of treated wastewater (m^3)	Environmental / Infrastructure	NA	6
	6.2	Number of wastewater treatment plants	Environmental / Infrastructure		6, 9
Solid Waste Management	7.1	Solid urban waste from tourism	Environmental	↓	11, 12
	7.2	Percentage of tourist accommodation that separates waste	Environmental / Social	↑	12
	7.3	Tourist accommodation establishments that have implemented circular economy measures	Environmental / Economic	NA	12, 13
Climate Action	8.1	Tourism businesses awarded by the 360º Committed Program	Environmental / Economic / Governance	↑	8, 12
	8.2	Tourism businesses awarded with Green Key	Environmental / Governance	↑	12, 13
	8.3	Tourism businesses awarded by Biosphere	Environmental / Governance	↑	11, 12, 13
	8.4	Municipalities awarded by ECO XXI	Environmental / Governance / Political	↓	11, 13, 16
	8.5	Number of beaches with blue flags	Environmental / Social	↑	6, 14
	8.6	Dependence on the three main long-distance markets	Economic / Political	↓	8, 13, 17
Accessibility	9.1	Total number of accessible rooms	Social / Infrastructure	↑	10, 11
	9.2	Number of accessible beaches	Social / Environmental	↑	

Local Satisfaction	10.1	Overall level of satisfaction with tourism in the region of residence	Social	↓	11
	10.2	Impacts of tourism on quality of life in the region of residence	Social	↓	3, 11
	10.3	Impacts of tourism on cultural heritage in the region of residence	Social / Cultural	↓	11
	10.4	Impacts of tourism on natural heritage in the region of residence	Environmental	↓	15
	10.5	Impacts of tourism on regional identity	Social / Cultural	↓	11
	10.6	Impacts of tourism on regional culture	Social / Cultural	↓	
	10.7	Impacts of tourism on environmental preservation in the region of residence	Environmental / Social	↓	13, 15
	10.8	Impacts of tourism on the economy in the region of residence	Economic / Social	↓	8
	10.9	Annual tourism intensity	Environmental / Social / Economic	↑	11, 12
Governance	11.1	Dependence on the three main markets	Economic / Political	↑	8, 13, 17
	11.2	Percentage of total revenue in low-density areas	Economic / Territorial / Social	↑	8, 10, 11
	11.3	Percentage of overnight stays in low-density areas	Economic / Territorial	↑	10, 11
	11.4	Growth in total revenue higher than growth in overnight stays	Economic	↑	8, 12
Culture and Heritage	12.1	Percentage of municipalities with museums	Social / Cultural / Infrastructure	↑	11
	12.2	Number of live performance sessions	Social / Cultural	↑	
	12.3	Number of spectators at live performance sessions	Social / Cultural	↑	
	12.4	Number of visitors to museums	Social / Cultural / Economic	↑	8, 11
	12.5	Number of foreign visitors to museums	Social / Cultural / Economic	↑	8, 17
	12.6	Spending on cultural and creative activities (€)	Economic / Cultural	↑	8
	12.7	Spending on cultural heritage (€)	Economic / Cultural	↓	8, 11
Sustainable Mobility	13.1	Percentage of tourist establishments with a fully electric fleet	Environmental / Economic	NA	7, 13
	12.2	Number of crossings on footpaths and cycle paths per month	Environmental / Social / Mobility		11, 13
	12.3	Seasonal patterns of walking and cycling routes	Environmental / Social / Temporal		11, 12

Centro de Portugal - Geography and Characteristics

The Centro de Portugal region occupies a strategic position in mainland Portugal, between Lisbon and Porto, being served by these territories' airports, regarding international tourism, besides the main border with Spain, in Vilar Formoso.

The destination is governed by Entidade Regional de Turismo Centro de Portugal (TCP), the regional entity responsible for:

Strategic coordination of tourism

Destination promotion and positioning

Coordination between public policies and economic agents

Sustainability monitoring is conducted by the Sustainable Tourism Observatory of Central Portugal (OTSCP), which:

Produces and monitors economic, social, and environmental indicators

Provides territorially disaggregated information

Supports evidence-based decision making

The OTSCP is part of the International Network of Sustainable Tourism Observatories (INSTO), ensuring annual reporting in accordance with international standards and alignment with the national tourism strategy. The TCP–OTSCP model structures the regional governance system and provides the framework for the analysis presented in the following chapters.

Tourism activity in Centro de Portugal

The overview of tourism activity in Centro de Portugal in 2024 must be preceded by an analysis of the installed capacity in the territory and how it spreads within its sub regions.

Tourism supply structure

The growth in tourism supply keeps pace with the recent dynamics of demand. In 2024, Centro de Portugal had 1.623 tourist accommodation establishments, an increase from the 1.554 establishments in 2023 and the 1.365 recorded in 2019.

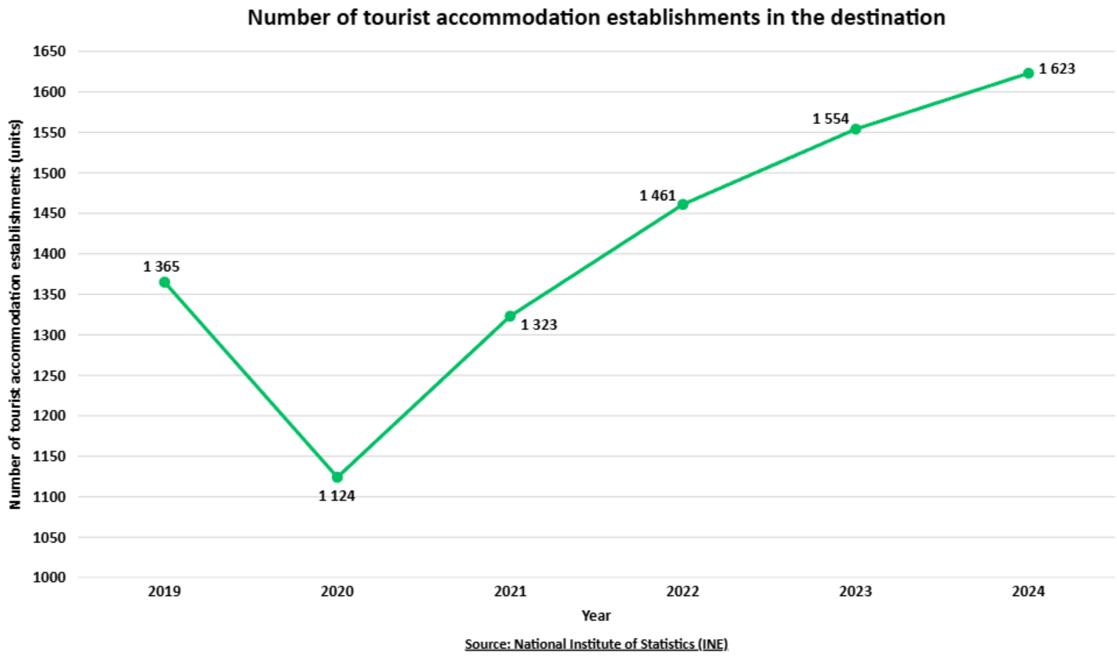


Chart 1 - Number of tourist accommodation establishments in Centro de Portugal (NUTS II), 2019–2024

The structure of the accommodation market highlights the dominant role of local accommodation, which continues to be the category with the highest number of units, considering the universe studied by INE, the national statistics institute, which, for local accommodation, only considers the establishments with a ten or higher bed capacity. The number of 753 local accommodation establishments monitored by INE is far from the 13.747 registered in the official files by the end of 2024, which might lead to a future study of the exact importance of this kind of accommodation in the regional offer to be included as a new indicator in future editions of the annual report.

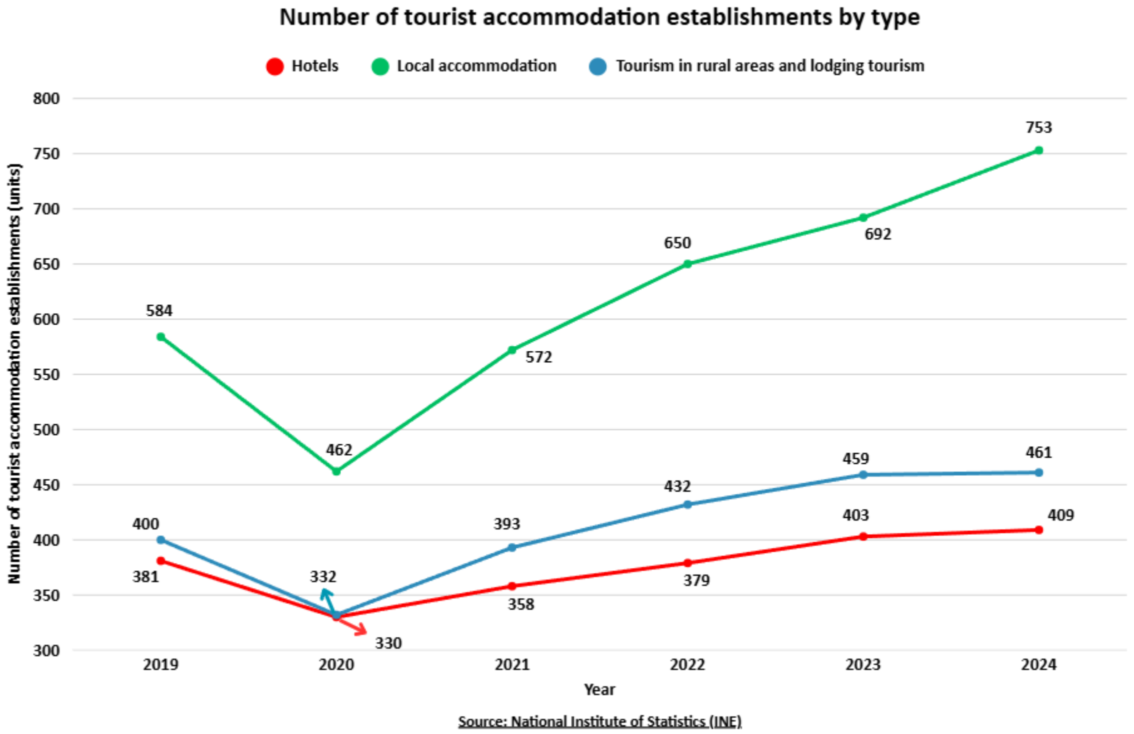


Chart 2 - Number of tourist accommodation establishments by type in Centro de Portugal (NUTS II), 2019–2024

This trend reflects the diversity of the regional tourism landscape and the growing importance of more flexible accommodation options, often found in areas with lower tourist density.

Total accommodation capacity reached 70.549 beds in 2024, reinforcing the growth observed in previous years (68.644 beds in 2023 and 63.673 in 2019).

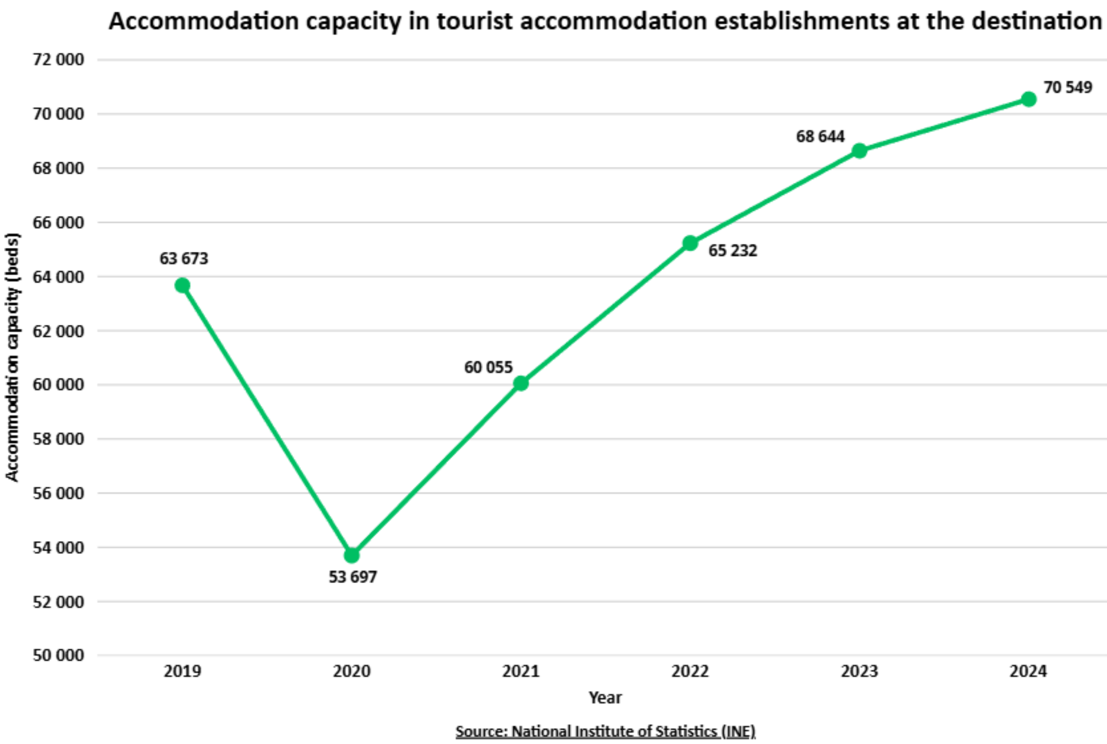
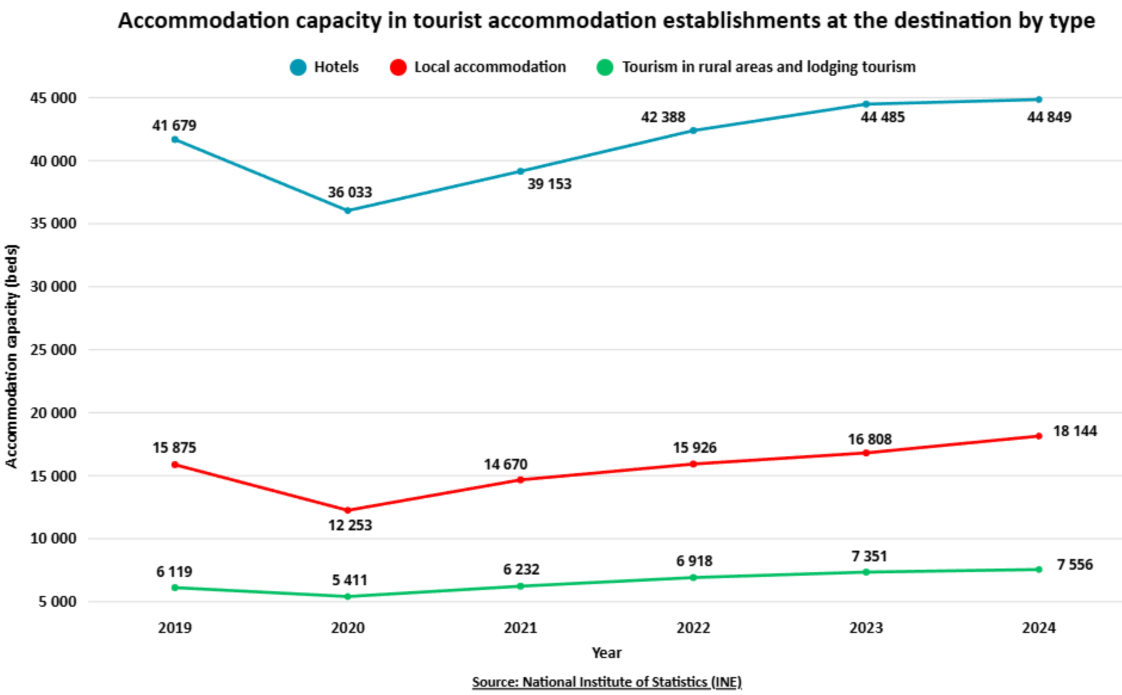


Chart 3 - Accommodation capacity (beds) in tourist accommodation establishments in Centro de Portugal (NUTS II), 2019–2024

The breakdown of installed capacity by type reveals the dominant role of the hotel sector, despite the fewer number of establishments:



This structure highlights the central role of the hotel sector in the region's capacity to accommodate tourists, although the growth of local accommodation continues to contribute to the diversification of the offering.

Territorial distribution of tourism supply

The geographical distribution of tourism providers reveals significant differences between the eight Intermunicipal Communities (CIMs) in Centro de Portugal.

In 2024, the Coimbra Region had the highest number of establishments (316), followed by Oeste (302) and Beiras and Serra da Estrela (265), while Beira Baixa had the lowest number of establishments, with 91 officially registered.

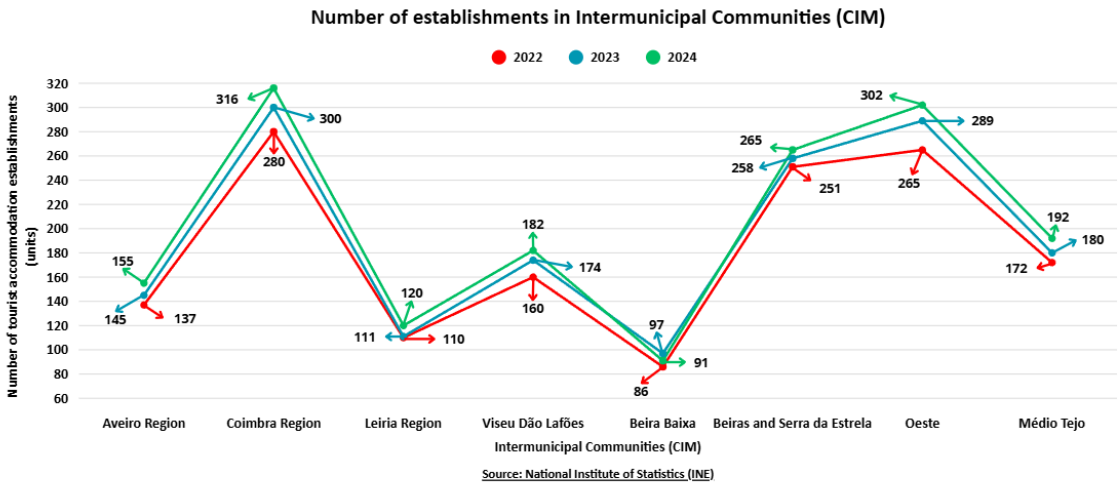


Chart 5 - Number of tourist accommodation establishments in Centro de Portugal (NUTS II), by Intermunicipal Communities (NUTS III), 2022–2024

This distribution highlights the existence of more established tourist hubs alongside areas with lower levels of tourist activity, reflecting the destination's territorial diversity.

Accommodation capacity by territory

The analysis of accommodation capacity also confirms significant regional differences. In 2024, the regions with the highest installed capacity were Coimbra Region (13.716 beds), followed by Oeste (13.344) and Médio Tejo (12.731), being Beira Baixa the region with less available tourism beds (2.754).

This distribution shows that regional tourist capacity is relatively concentrated in certain areas with greater tourism development, alongside regions on a smaller scale.

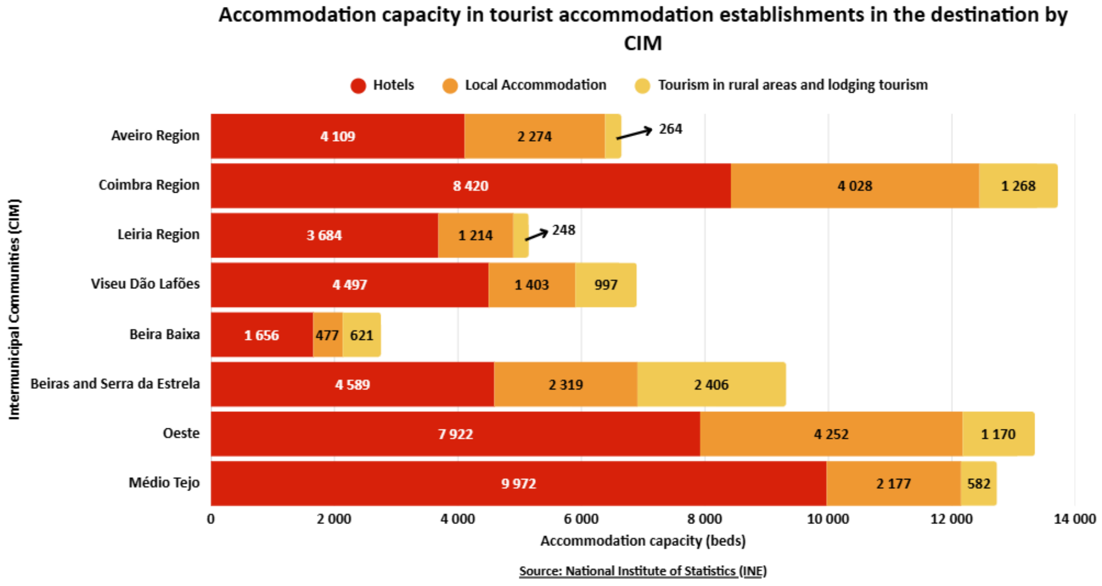


Chart 6 - Accommodation capacity (beds) in tourist accommodation establishments in Centro de Portugal (NUTS II), by CIM (NUTS III) and type (2024)

The analysis of tourism activity in Centro de Portugal in 2024 is part of a context of consolidation of the growth observed in the post-pandemic period. After the sharp contraction recorded in 2020, followed by a gradual recovery in 2021 and a significant acceleration in 2022 and 2023, 2024 marks the transition to a phase of stabilisation and maturity for the destination.

The main indicators no longer reflect an exceptional recovery effect and now show structural dynamics in demand, suggesting a more solid repositioning of Centro de Portugal in the national tourism landscape.

Evolution of tourism activity

In 2024, the number of guests reached 4.723.963, the highest figure in the series analysed. This result exceeds not only 2023 (4.443.397), but also the pre-pandemic level of 2019 (4.118.656).

After the low recorded in 2020 (1.883.999 guests), the recovery trajectory was consistent, with a strong rebound in 2022, followed by continued growth in 2023 and a stabilisation in 2024.

This growth confirms the destination's increasing appeal. However, as an observatory, it is important to emphasise that an increase in volume is not, in itself, synonymous with sustainability. Quantitative consolidation requires constant monitoring of tourism intensity and territorial absorption capacity.

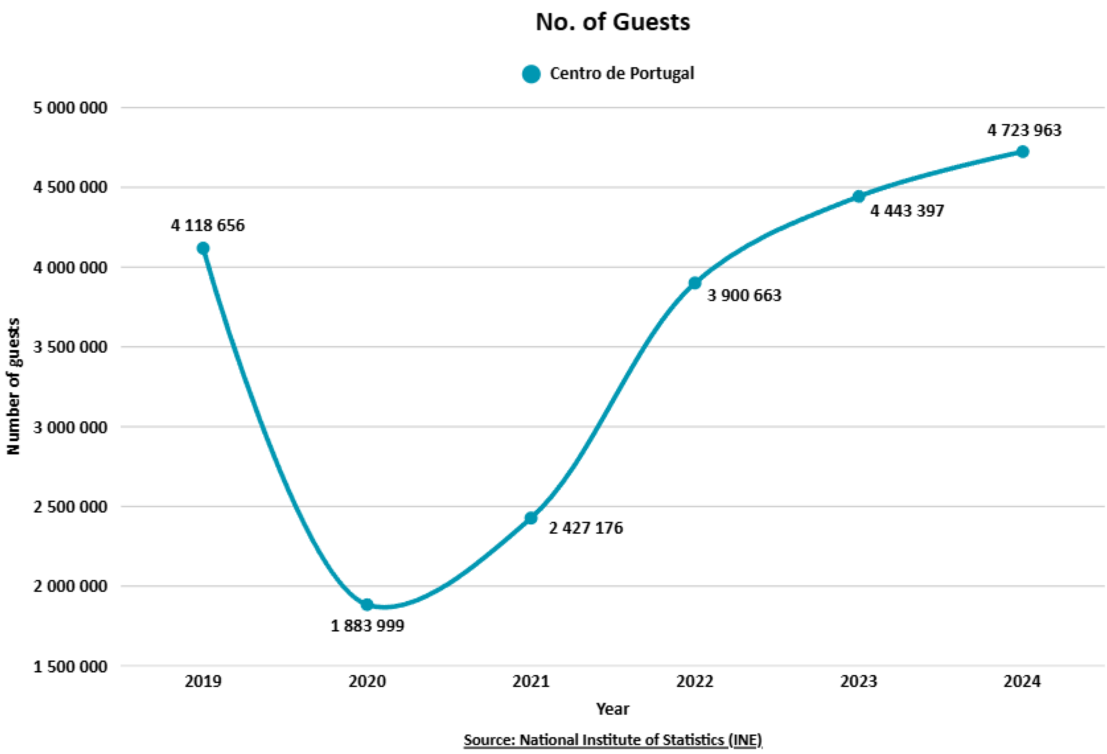


Chart 7 - Number os guests in tourist accommodation establishments in Centro de Portugal (NUTS II), 2019-2024

The evolution of overnight stays reinforces this reading. In 2024, there were 8.367.361 overnight stays, also the highest figure in the series. This result compares with 7.942.254 in 2023 and 7.134.863 in 2019.

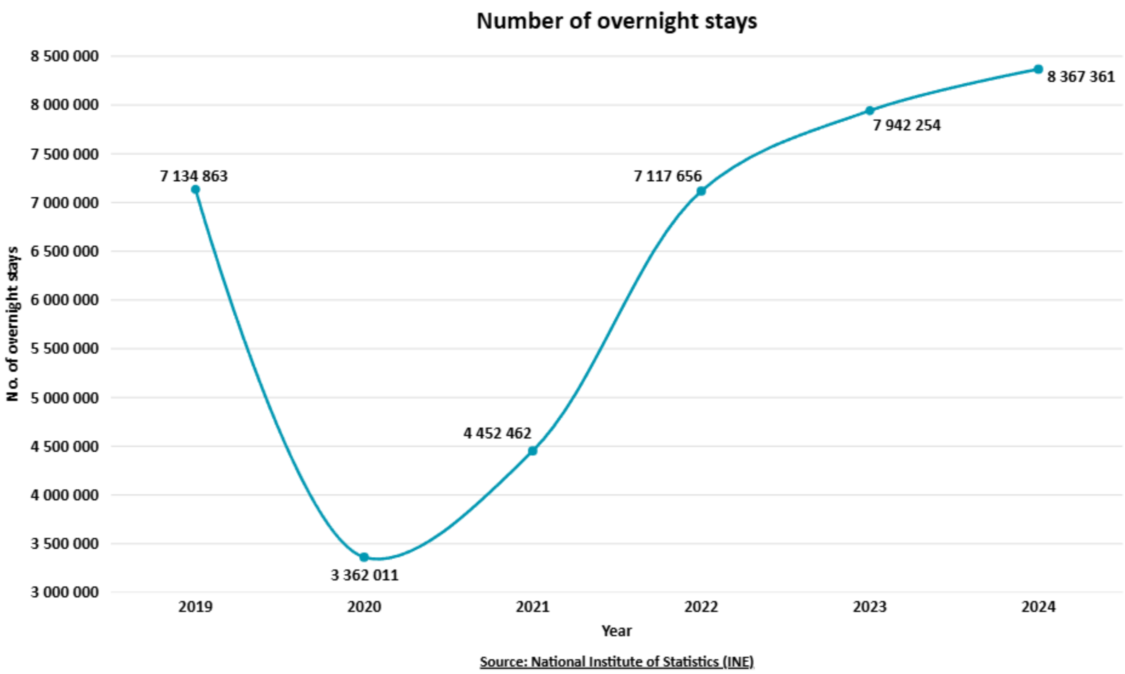


Chart 8 - Number of overnight stays in tourist accommodation establishments in Centro de Portugal (NUTS II), 2019–2024

As relevant as the evolution of overnight stays is the importance of the destination compared to the national evolution in this indicator. In 2024, Centro de Portugal reached a quota of 10,41% of the overnight stays that occurred in Portugal, which constitutes a growth compared to 2023 (10,29%) and a clear growth when comparing to the relevance of the destination in 2015 (9,55%).

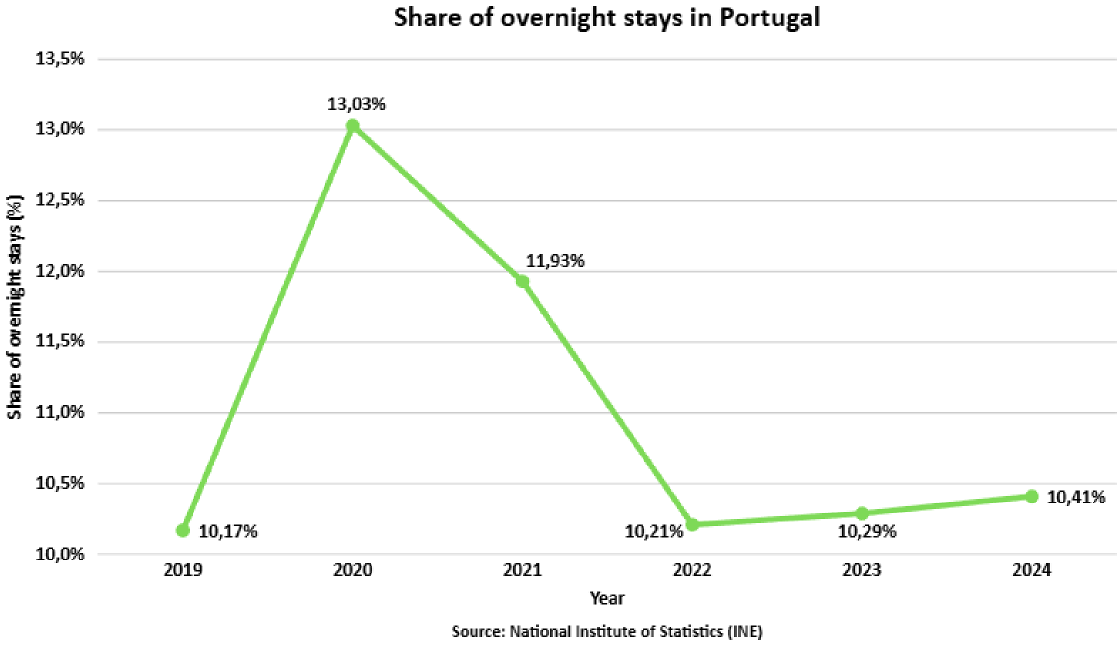


Chart 9 - Share of overnight stays in Centro de Portugal (NUTS II) in the national total, 2019–2024

The fact that 2024 exceeded pre-pandemic levels in terms of guests and overnight stays confirms the structural consolidation of regional tourism activity. However, it should be noted that the pace of growth is beginning to slow down compared to the accelerated recovery phase, a sign that a new equilibrium point is approaching.

Distribution of guests by territory

The territorial distribution of guests reinforces the asymmetries already observed in accommodation capacity. In 2024, the highest number of guests was recorded in the Coimbra Region (973.768), followed by Médio Tejo (972.249) and Oeste (795.292). These figures confirm the role of these territories as the main poles of tourist attraction within Centro de Portugal.

In contrast, regions such as Leiria (366.356), Viseu Dão Lafões (347.509) and especially Beira Baixa (160.560) register lower volumes of guests, highlighting a more limited capacity to attract tourist flows or a more niche demand profile.

The comparison between 2022 and 2024 reveals a consistent growth trend across all CIMs, although with different intensities. The most dynamic increases are observed in territories already positioned as leading destinations, such as Médio Tejo (+43%), or inland territories such as Viseu Dão Lafões (+25%) or Beiras and Serra da

Estrela (+24%) suggesting some signs of a real distribution of demand, rather than just the reinforcement of existing territorial concentration patterns.

Despite what this recent pattern suggests, the regional system continues to be characterised by a strong spatial concentration of visitors, raising important challenges in terms of territorial balance and sustainable tourism management.

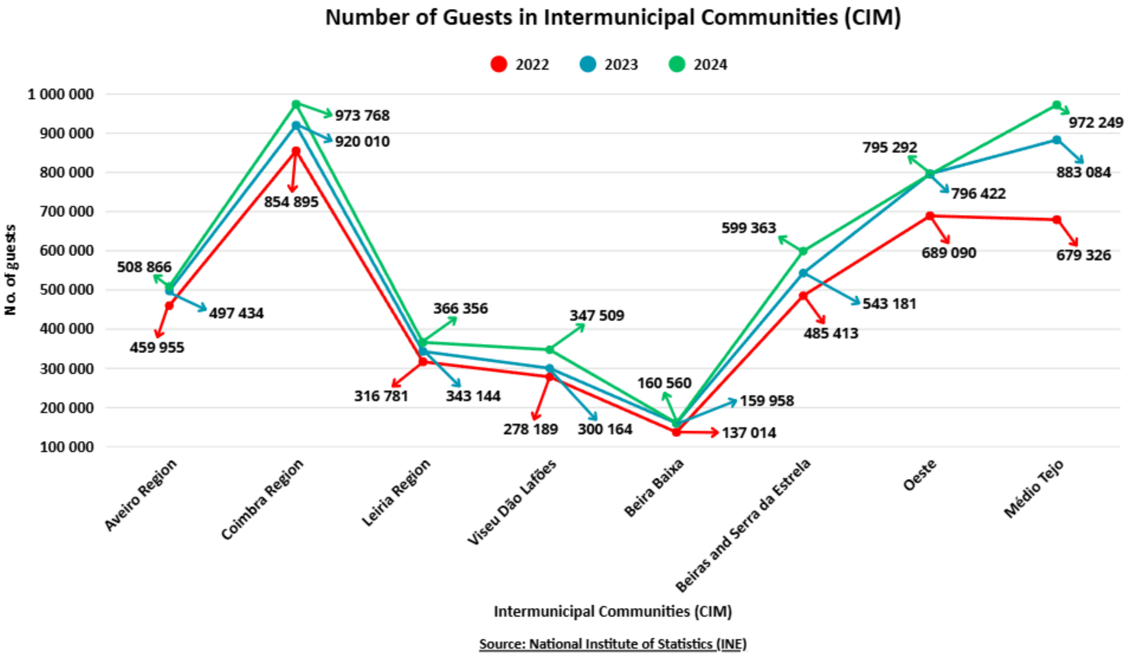


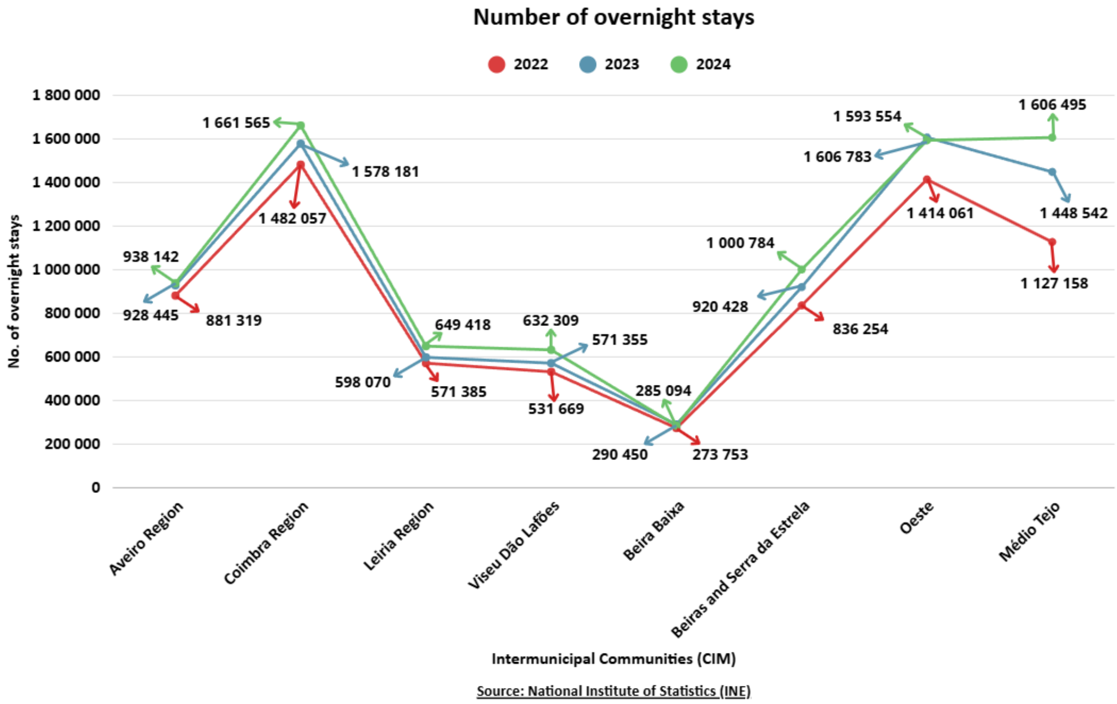
Chart 10 - Number of guests in tourist accommodation establishments in Centro de Portugal (NUTS II), by CIM (NUTS III), 2022–2024

Distribution of overnight stays by territory

The geographical distribution of overnight stays provides a better understanding of tourism patterns across the region.

In 2024, the highest numbers of overnight stays were recorded in Coimbra Region (1.661.565), Médio Tejo (1.606.495) and Oeste (1.593.554), while Beira Baixa had the lowest, with 285.094.

This pattern highlights a significant concentration of tourist activity in certain areas, whilst confirming the diversity of the regional tourism model.



Length of Stay and Demand Profile

The average length of stay in Centro de Portugal was 1,77 nights in 2024, slightly below 2023 (1,79) and close to the figure recorded in 2019 (1,73). After peaking in 2021 (1,83), the indicator has been stabilising. This behaviour suggests that the recent growth in tourist activity is mainly the result of an increase in the number of visitors and not a significant extension of the length of stays.

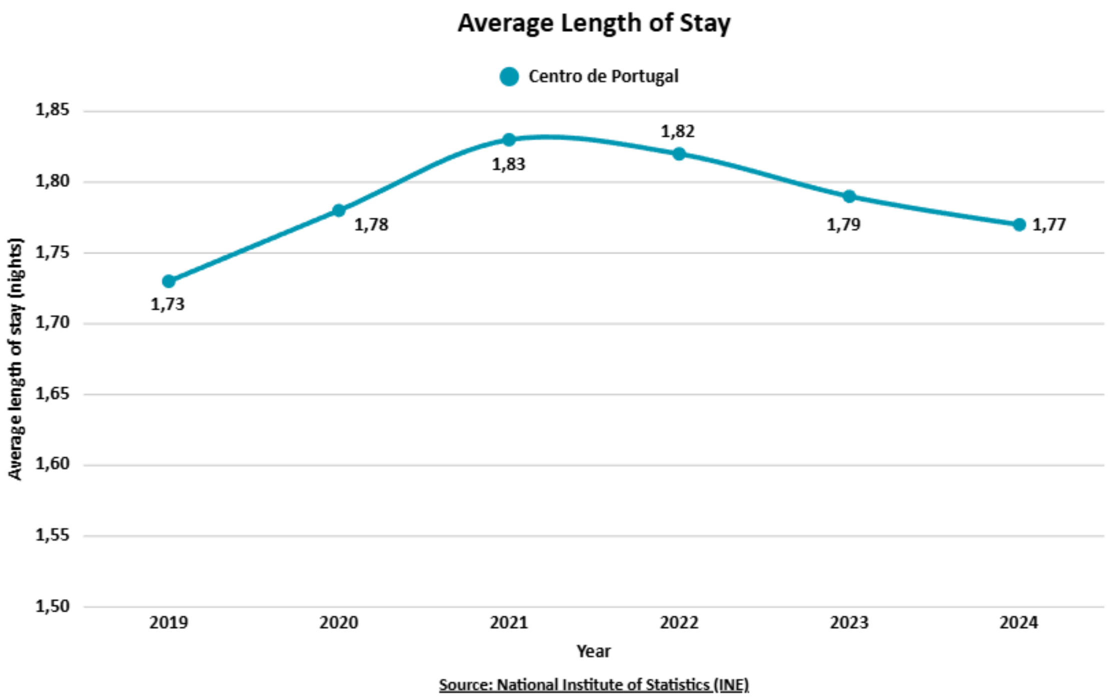


Chart 12 - Average length of stay in tourist accommodation establishments in Centro de Portugal (NUTS II), 2019–2024

This pattern confirms the predominance of short and medium-length stays, a structural characteristic of the destination. From a tourism management perspective, this reality implies greater operational intensity per overnight stay.

By type of accommodation, there are moderate differences, which reflect distinct patterns of tourism consumption, with local accommodation and rural tourism often associated with slightly longer stays.

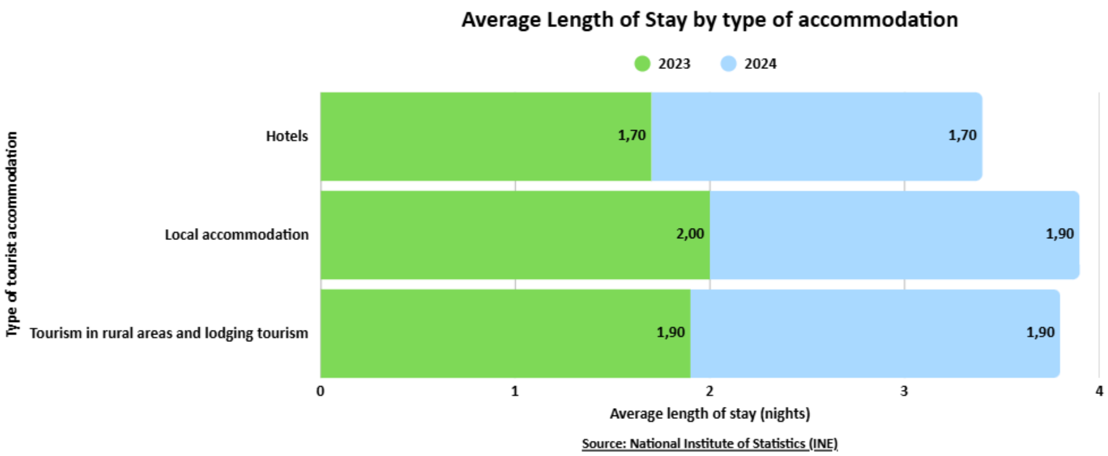


Chart 13 - Average length of stay in tourist accommodation establishments in Centro de Portugal (NUTS II), by type of accommodation, 2023–2024

The regional analysis also highlights differences between the CIMs. In 2024, the longest average length of stay was recorded in the Oeste region (2,0 nights), whilst regions such as Coimbra, Médio Tejo, and Beiras e Serra da Estrela recorded figures of around 1,7 nights.

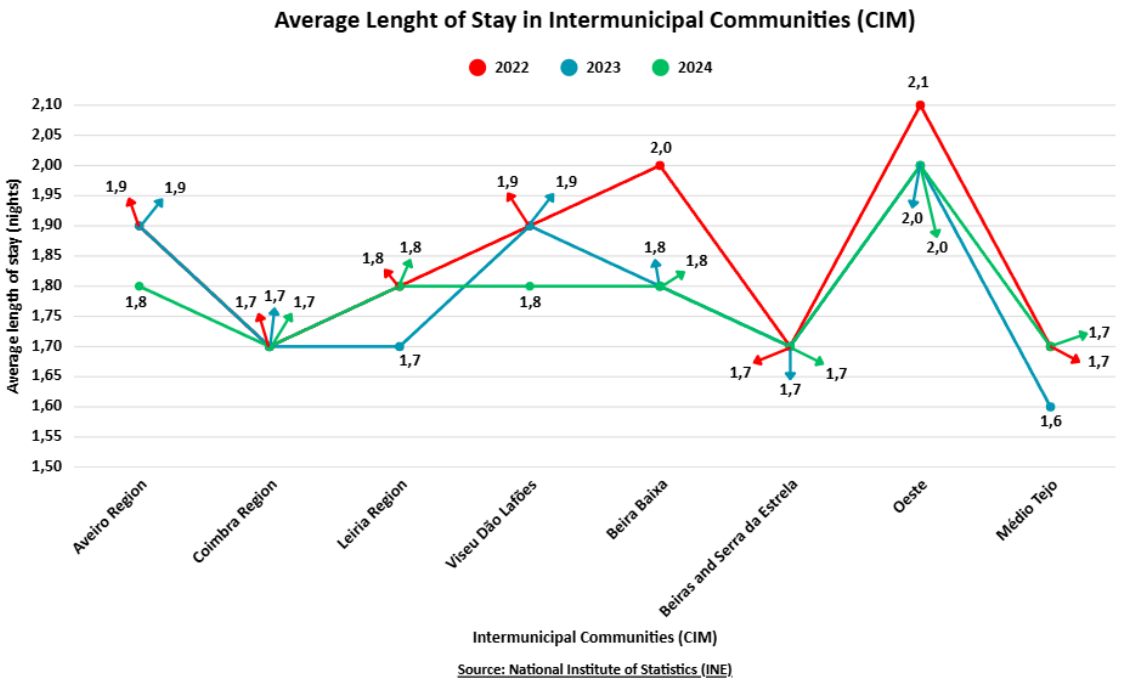


Chart 14 - Average length of stay in tourist accommodation establishments in Centro de Portugal (NUTS II), by CIM (NUTS III), 2022–2024

Structure of Demand by Main Markets (2024)

An analysis of the structure of demand in 2024 complements the overall picture of the evolution of tourist activity by identifying the composition of the main source markets. Tourist demand in Centro de Portugal shows a relatively balanced split between the domestic and international markets.

In 2024, the proportion of foreign guests stood at 36,94%, a figure virtually identical to that recorded in 2023 (36,97%), indicating that the internationalisation of demand has stabilised and still isn´t at the same level of pre pandemic year of 2019.

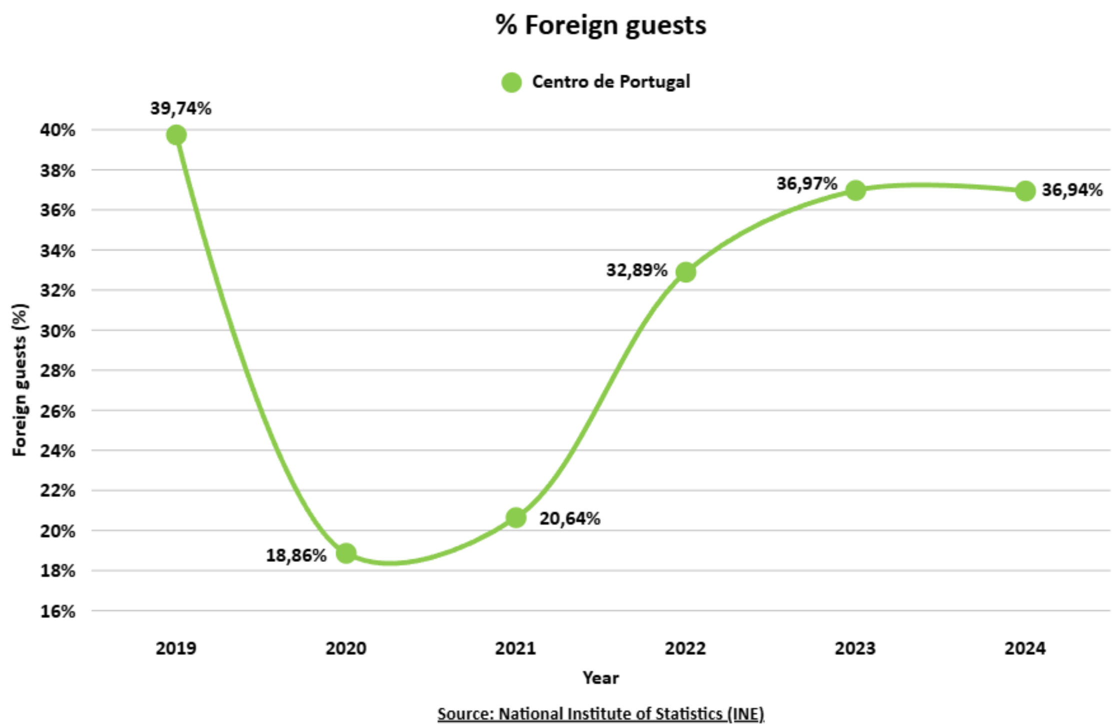


Chart 15 - Share of foreign guests in tourist accommodation establishments in Centro de Portugal (NUTS II), 2019–2024

Portugal remains the main market, accounting for 58,70% of total overnight stays in the region. This strong domestic component is a factor of structural stability, reducing the destination's exposure to external shocks of a geopolitical or economic nature.

Among foreign markets, Spain stands out (10,02%), followed by France (3,81%), the United States (3,25%), Brazil (3,08%), Germany (2,80%), Italy (2,25%), the United Kingdom (1,93%), Poland (1,80%) and the Netherlands (1,34%).

The distribution reveals a relatively concentrated structure, with the domestic market dominating and a second level composed of nearby European markets. The growing presence of non-European markets, such as the United States and Brazil, shows greater internationalisation of demand, albeit still at a moderate level.

This configuration confirms that the recent growth in tourism activity is based on a solid foundation of domestic demand, complemented by gradual and diversified internationalisation.

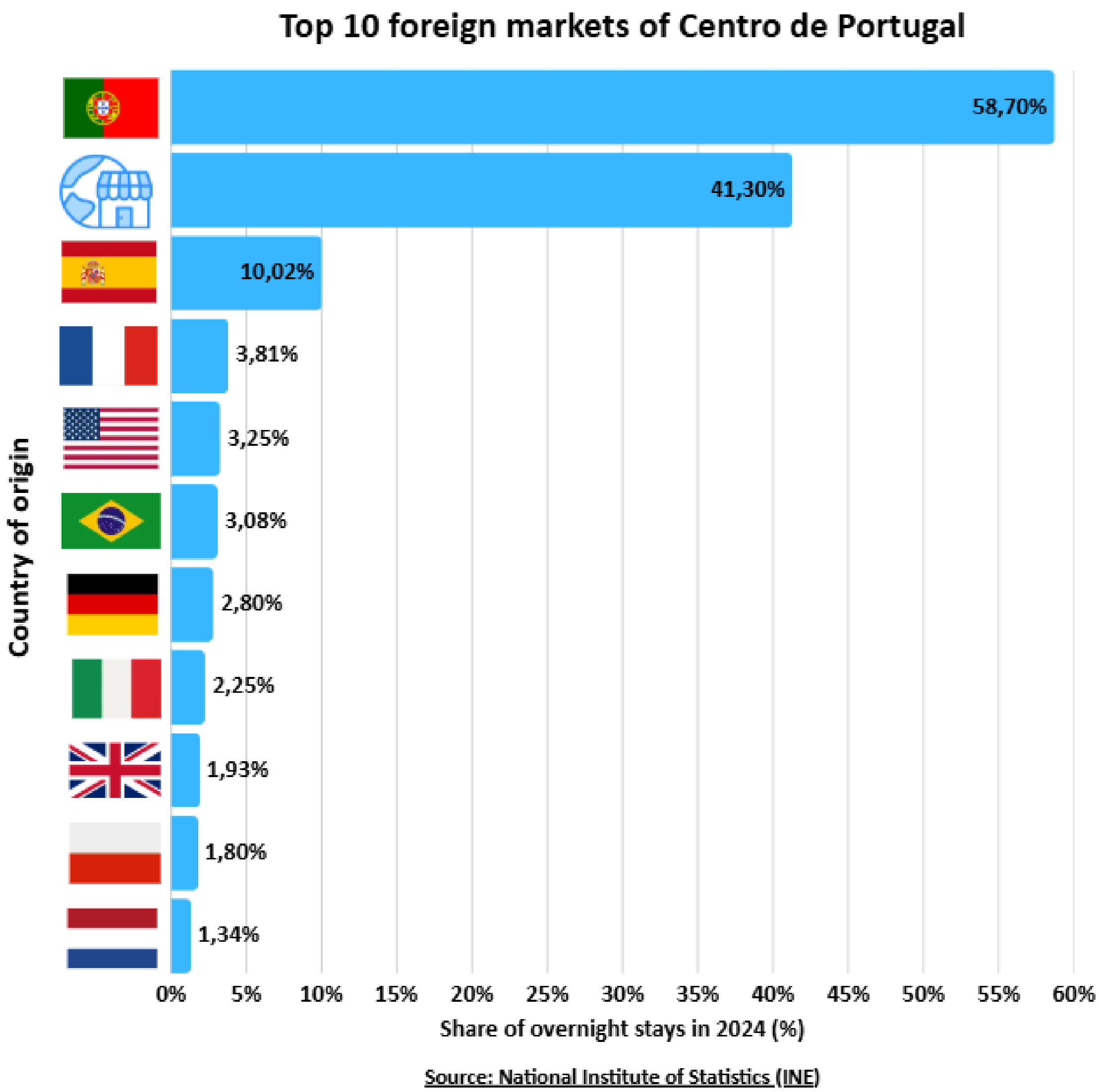


Chart 16 - Top 10 foreign markets in Centro de Portugal (NUTS II), based on the share of overnight stays, 2024

International demand by territory

The geographical distribution of international demand reveals significant differences between the CIMs.

In 2024, the following stand out: Médio Tejo (54,49% of foreign guests), Aveiro (43,50%), Oeste (42,14%) and Coimbra (39,83%). Apart from the religious international appeal of Fátima, in Médio Tejo, the other three regions include coastal areas, which are the most common factor of attractiveness for international tourists.

Inland territories such as Beiras and Serra da Estrela (14,19%), Viseu Dão Lafões (18,70%) and Beira Baixa (22,94%) have the lowest proportion of international visitors, despite the proximity to the Spanish market, reflecting a demand profile that is more dependent on the domestic tourists.

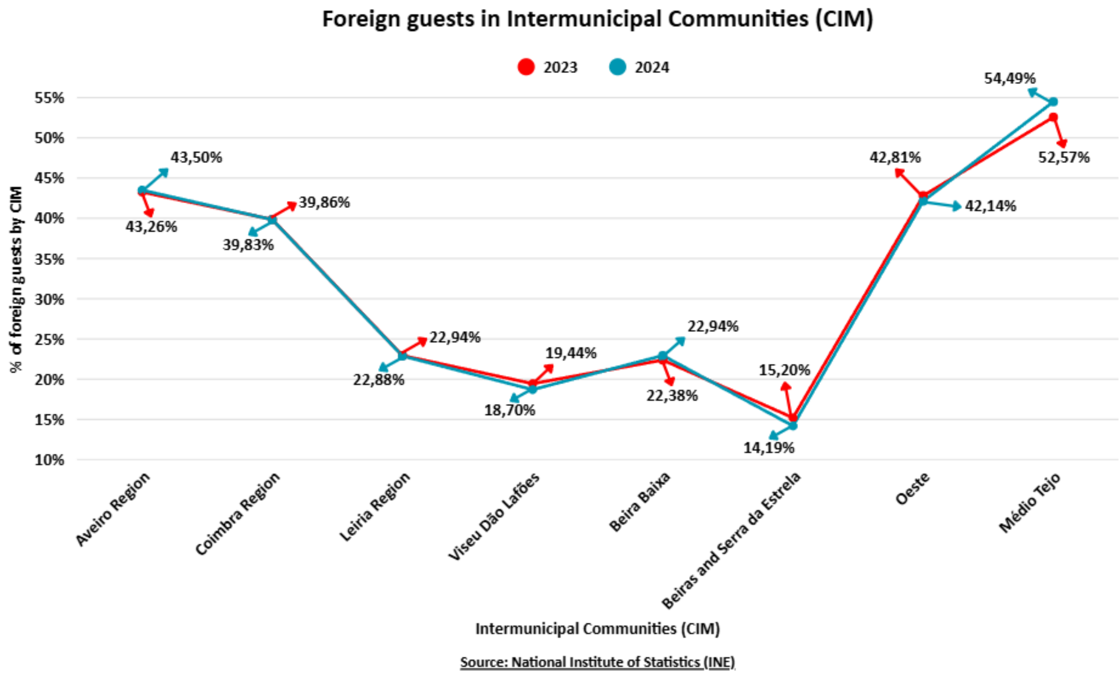


Chart 17 - Share of foreign guests in tourist accommodation establishments in Centro de Portugal (NUTS II), by CIM (NUTS III), 2023–2024

Occupancy Rate

The bed occupancy rate reached 34,2% in 2024, up from 33,7% in 2023 and higher than the 2019 figure (32,8%). After the low point in 2020 (19,8%), the recovery has been gradual and consistent, reflecting a progressively more efficient use of installed capacity.

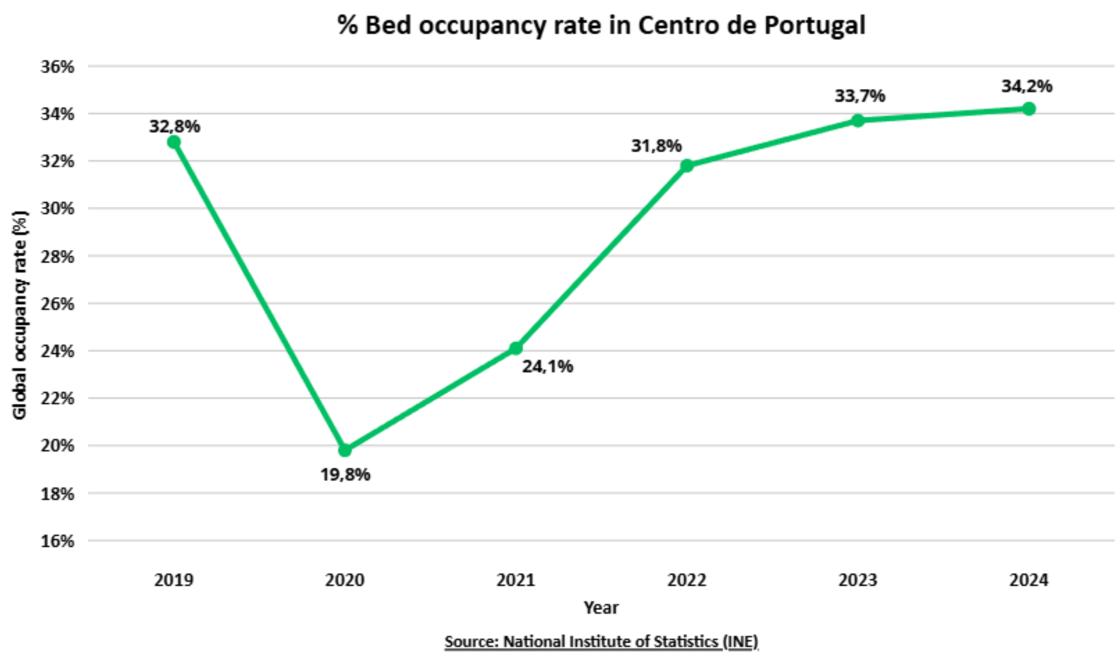


Chart 18 - Bed occupancy rate in tourist accommodation establishments in Centro de Portugal (NUTS II), 2019–2024

By type of accommodation, the following figures were recorded in 2024:

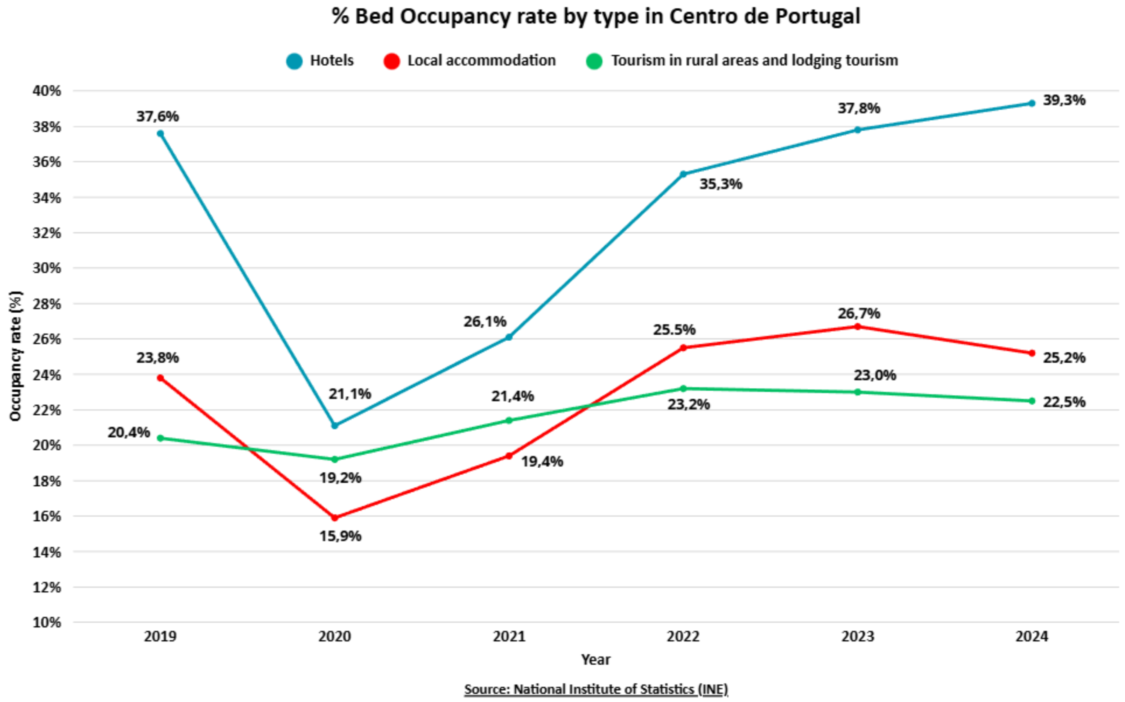


Chart 19 - Bed occupancy rate in tourist accommodation establishments in Centro de Portugal (NUTS II), by type of accommodation, 2019–2024

A regional analysis also reveals significant differences. In 2024, Aveiro (40,8%), Leiria (36,3%) and Médio Tejo (36,2%) stand out, whilst regions such as Viseu Dão Lafões (26,8%) Beira Baixa (29,2%) and Beiras and Serra da Estrela (29,6%) show more moderate occupancy levels.

Domestic tourism demand

Domestic tourism continues to play a key role in the region's tourism sector.

In 2024, there were 5.814.813 tourist trips involving at least one overnight stay in Centro de Portugal, not necessarily in tourism accommodation, as this study conducted by INE aims at a wider scope. These trips were divided between visits to family and friends (50,6%), leisure/tourism trips (39,6%), or business trips (4,6%), among other motivations with lower representation. This figure represents a slight decrease compared to 2023 (6.088.704 trips), following the growth observed during the post-pandemic recovery phase.

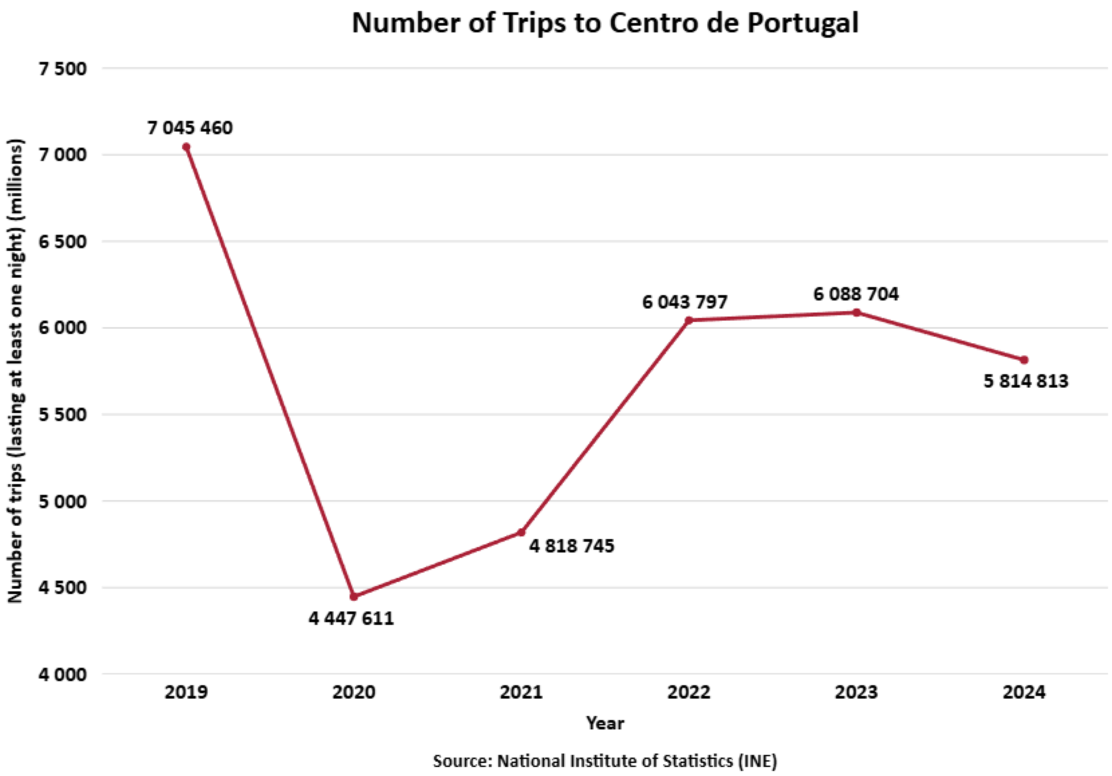


Chart 20 - Number of trips (with at least one overnight stay) to Centro de Portugal (NUTS II), 2019–2024

In relative terms, 24,89% of tourist trips made by residents of Portugal were to the Centro de Portugal region, a figure that confirms the importance of the domestic market for the stability of regional tourism.

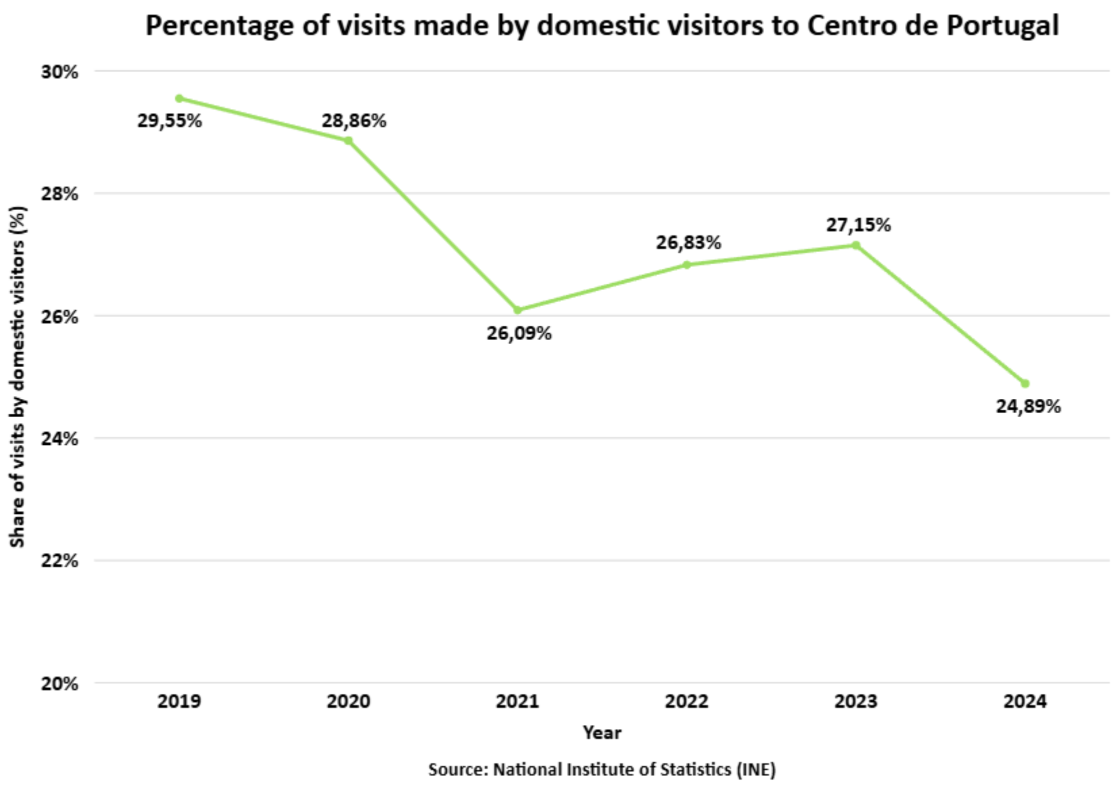


Chart 21 - Share of visits made by domestic visitors to Centro de Portugal (NUTS II), 2019–2024

Tourism Activity - Conclusion

Overall, the main indicators of tourism activity in 2024 show:

- Sustained growth in demand;
- Exceeding pre-pandemic levels;
- Improved utilisation of installed capacity;
- Consistent strengthening of economic performance.

Centro de Portugal is thus entering a phase of consolidation and greater maturity. Tourism activity no longer reflects an exceptional recovery dynamic and now shows structural growth patterns.

This consolidation creates a solid basis for the subsequent analysis of territorial dynamics and for the assessment of the economic, social and environmental impacts of tourism activity within the scope of the INSTO report.

Issue Areas

Tourism Seasonality

Seasonality remains one of the most striking structural features of tourism in Centro de Portugal. The temporal concentration of demand has direct implications for the pressure exerted on territorial resources, the efficient use of installed capacity, employment stability and the economic resilience of the destination. Within the framework of INSTO monitoring, the analysis of seasonality allows us to assess not only when tourist activity is at its peak, but also the territory's capacity to distribute activity more evenly throughout the year.

This dimension is based on the monthly evolution of overnight stays, occupancy rates and the synthetic seasonality index, complemented by territorial analysis by Inter municipal Communities (CIM).

Monthly distribution of overnight stays

The monthly evolution of overnight stays in 2024 confirms a clearly defined seasonal pattern. The year begins with 381.455 overnight stays in January, increasing progressively to 740.029 in June. This upward trajectory reveals a gradual intensification of activity as the high season approaches, although still far from the levels recorded in the summer.

The peak occurs, again, in August, with 1.233.918 overnight stays in 2024, higher than the already high figure recorded in 2023 (1.188.556 overnight stays) and also in the third quarter (2.992.834 overnight stays). This traditional summer peak confirms the continued importance of the high season, but it is also accompanied by growth across most months of the year, indicating a more generalised increase in demand than a concentration limited to peak periods.

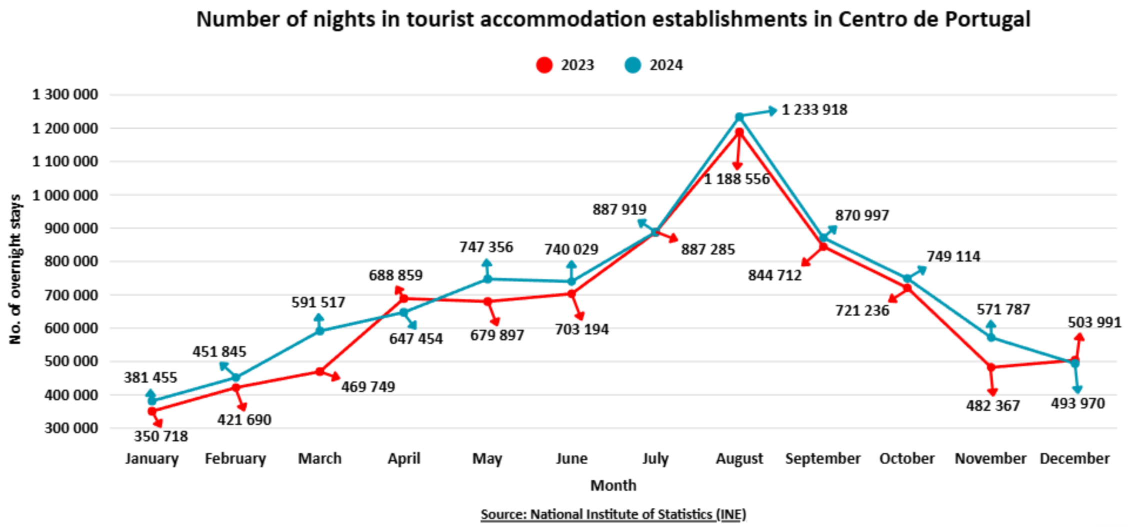


Chart 22 - Number of overnight stays in tourist accommodation establishments in Centro de Portugal (NUTS II), by month, 2023–2024

After August, there is a significant reduction: 870.997 overnight stays in September, followed by a continuous decline in the autumn and winter months, reaching 571.787 in November and 493.970 in December. The difference between the

August peak and the winter low remains significant, confirming the persistence of a concentrated pattern.

Although the figures for 2024 are generally higher than those for 2023 in most months, the increase in activity does not translate into a substantial redistribution of demand throughout the year. Although the highest volumes remain concentrated in the summer months, the observed growth extends to most of the year, suggesting a gradual broadening of demand beyond the traditional peak season, even if seasonality patterns remain clearly defined.

Occupancy rates and temporal concentration

Occupancy rates reinforce this reading. In 2024, the room occupancy rate reached 68,2% in August, while the bed occupancy rate stood at 59,7% in the same month. In contrast, in January, room occupancy was 30,4% and bed occupancy was 21,4%. The difference between the extremes of the year exceeds 35 percentage points, showing strong temporal asymmetry.

The period between May and October sees the highest levels of installed capacity utilisation, with room occupancy exceeding 50% for six consecutive months in 2024. Despite this slight extension of the high season, August clearly remains the month with the highest pressure.

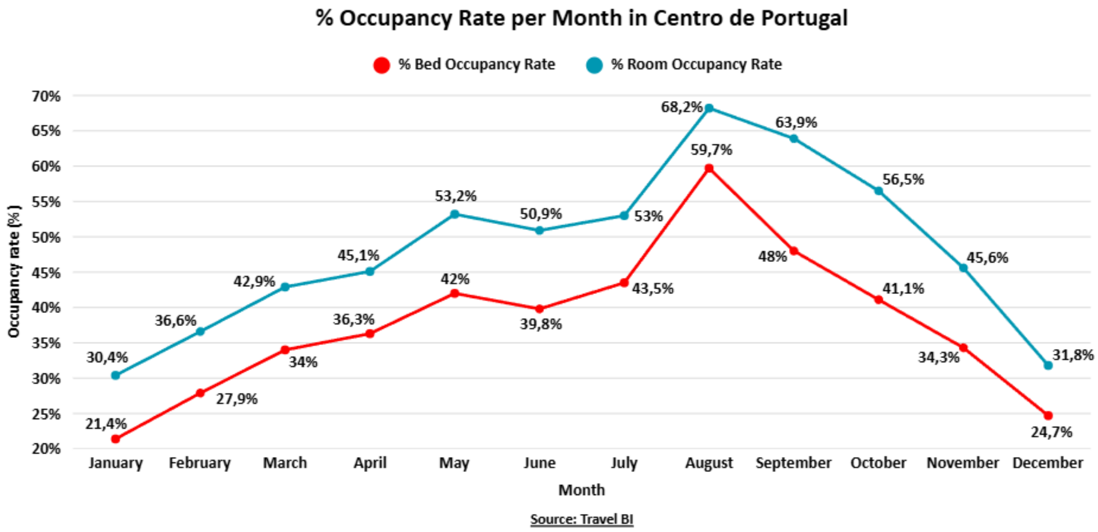


Chart 23 - Bed and room occupancy rates in tourist accommodation establishments in Centro de Portugal (NUTS II), by month

A comparison between 2023 and 2024 shows that tourism demand increased across most of the months of the year, indicating a broader recovery beyond the traditional peak season.

Seasonality index

The synthetic seasonality index for the Centro de Portugal region shows a downward trend compared to the exceptional values of the pandemic period, but remains structurally high. The progressive reduction since 2020 indicates a return to more stable patterns. However, the 2024 figure continues to show a significant concentration of activity in a limited period of the year. The slight improvement does not alter the structural nature of the phenomenon.

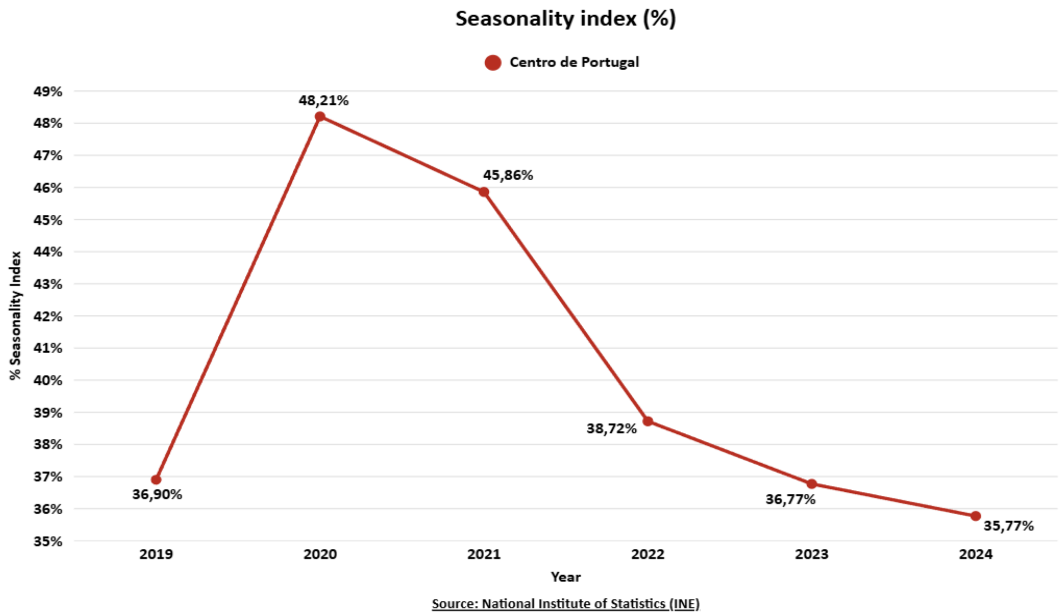


Chart 24 - Seasonality index in Centro de Portugal (NUTS II), 2019–2024

Territorial seasonality (CIM)

Seasonality manifests itself differently across the territory, reflecting the supply profiles and dominant tourism products in each sub-region, from the highest seasonality index in Oeste (39,86%), strongly affected by coastal tourism fluxes, to the lowest in Beiras and Serra da Estrela (29,92%), which is also able to attract tourists in the low season, considering the nature of its resources, based on active tourism and being the only destination in Portugal able to attract snow tourism.

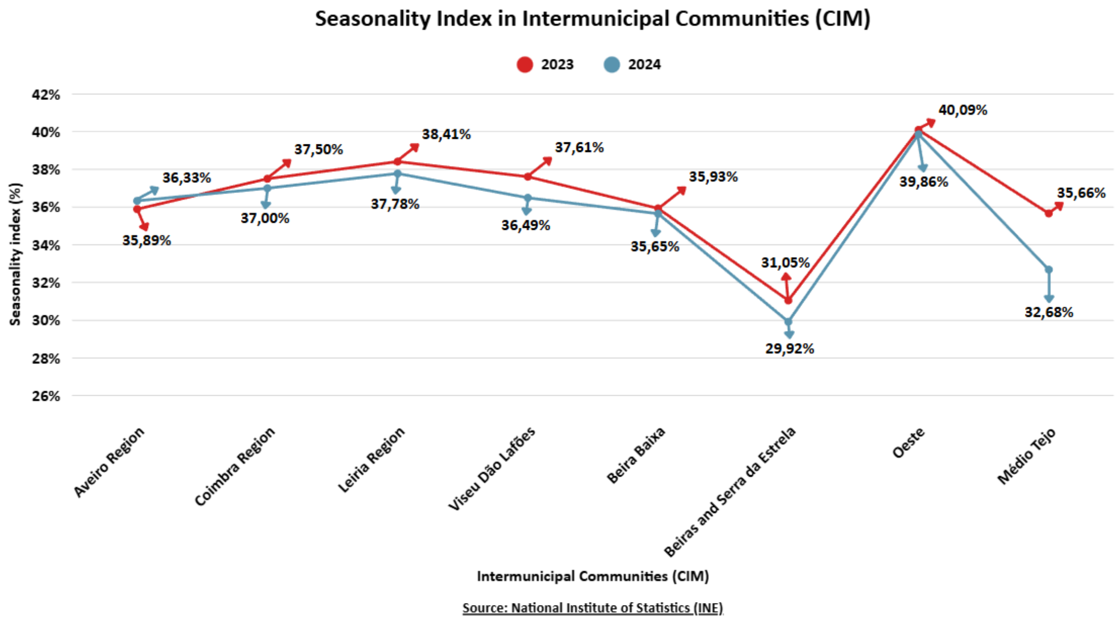


Chart 25 - Seasonality index in Centro de Portugal (NUTS II), by CIM (NUTS III), 2023–2024

The stability of values between 2023 and 2024 in most CIMs confirms that seasonality in Centro de Portugal is structural in nature, strongly associated with the model of territorial specialisation, although it's important to enhance that most regions were able to lower the value of the Seasonality Index.

Tourism Seasonality - Conclusion

An analysis of tourism seasonality in Centro de Portugal shows that, despite consistent growth in tourism activity, the seasonal distribution of demand remains heavily concentrated in the summer months. August remains the clear peak month for tourism activity, accounting for the highest numbers of overnight stays and occupancy rates. Although the overall seasonality index has shown a gradual decline since the pandemic period, the seasonal pattern remains structurally present.

Turismo Centro de Portugal, as the regional institution responsible for promoting this destination, has been including the mitigation of seasonality as a part of its strategy and actions, for instance by supporting events in low season (in 2024, 71,36% of the investment in events that occurred during low season, compared to the 55,5% in 2023), also by creating internal indicators, such as this, to fully monitor this reality.

As a part of this effort, Turismo Centro de Portugal also organized the tenth edition of its annual forum (Fórum Vê Portugal), created to discuss domestic tourism in Portugal, with relevant stakeholders from various fields, during the low season in 2024.

Seasonality therefore remains one of the main strategic challenges for the destination. Mitigating it requires differentiated responses by territory, product diversification and enhanced attractiveness in the off-season, in order to promote a more balanced use of installed capacity and greater economic stability throughout the year.

Employment

Employment in the tourism sector is one of the main channels through which tourism generates economic and social impact in the territory. Within the scope of INSTO monitoring, the analysis of employment allows us to assess not only the weight of tourism in the regional productive structure, but also its quality, demographic composition and gender balance.

Demographic trends reinforce structural challenges for the labour market in Centro de Portugal, particularly in relation to population ageing. In 2024, individuals aged over 70 represented 20,48% (17,86% in Portugal) of the total region´s population , exceeding the share of young people aged 0 to 19, which stood at 16,22% (17,55% in Portugal). This imbalance highlights an ageing demographic structure, with a growing proportion of elderly residents with huge impacts on the workforce available.

This trend places increasing pressure on the regional labour market, as a smaller pool of young people enters the workforce while a significant share of the population moves beyond working age. In sectors such as tourism, which are highly dependent on labour availability and seasonal flexibility, this demographic dynamic may constrain future growth and intensify recruitment challenges. Without effective strategies to attract, retain, and qualify younger workers, demographic ageing may become a limiting factor for sustained sectoral growth.

Evolution of total employment in tourism

The evolution of total employment in the sector follows the trajectory of tourism activity recorded between 2019 and 2024. After the contraction observed in 2020, employment recovers progressively in 2021 and accelerates in 2022, consolidating in 2023 and 2024. Employment growth in 2024 confirms that the recovery in demand translated into a recovery in the tourism labour market.

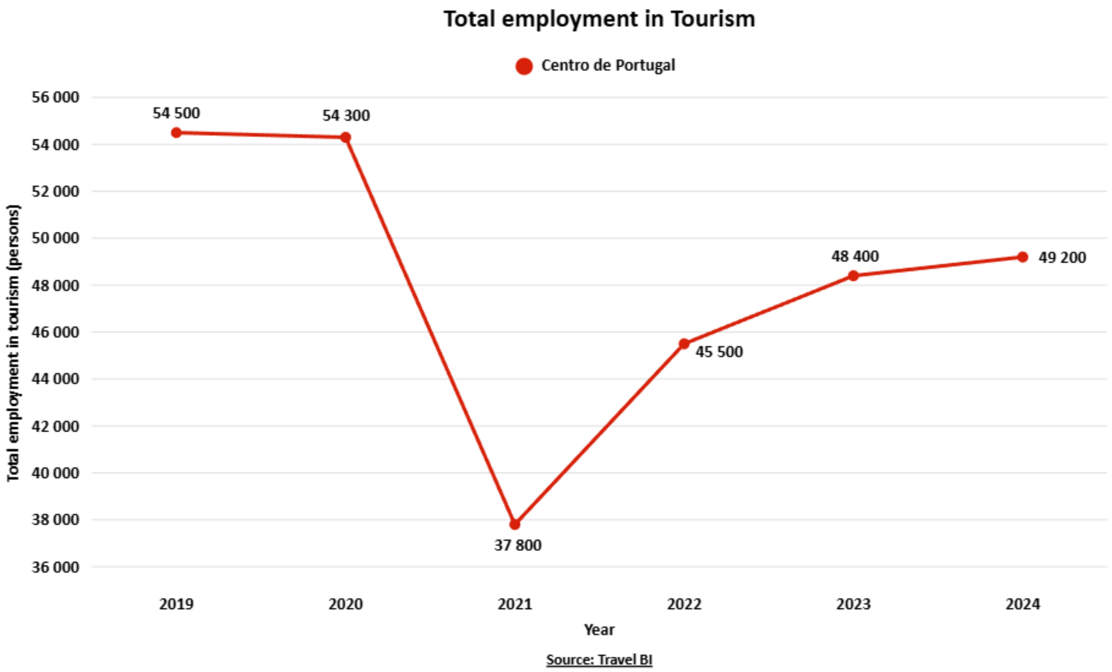


Chart 26 - Total employment in tourism in Centro de Portugal (NUTS II), 2019–2024

However, it should be noted that employment growth largely follows the evolution of the volume of activity, remaining heavily dependent on the structural seasonality of the destination.

The importance of tourism in regional employment

The percentage of jobs in tourism compared to total regional employment highlights the importance of the sector in the economy of Centro de Portugal. The evolution of this indicator makes it possible to assess whether tourism is strengthening or reducing its relative weight in the regional productive structure. In 2024, tourism share grew once more, maintaining the gradual process of recovery, reflecting the consolidation of activity after the pandemic period.

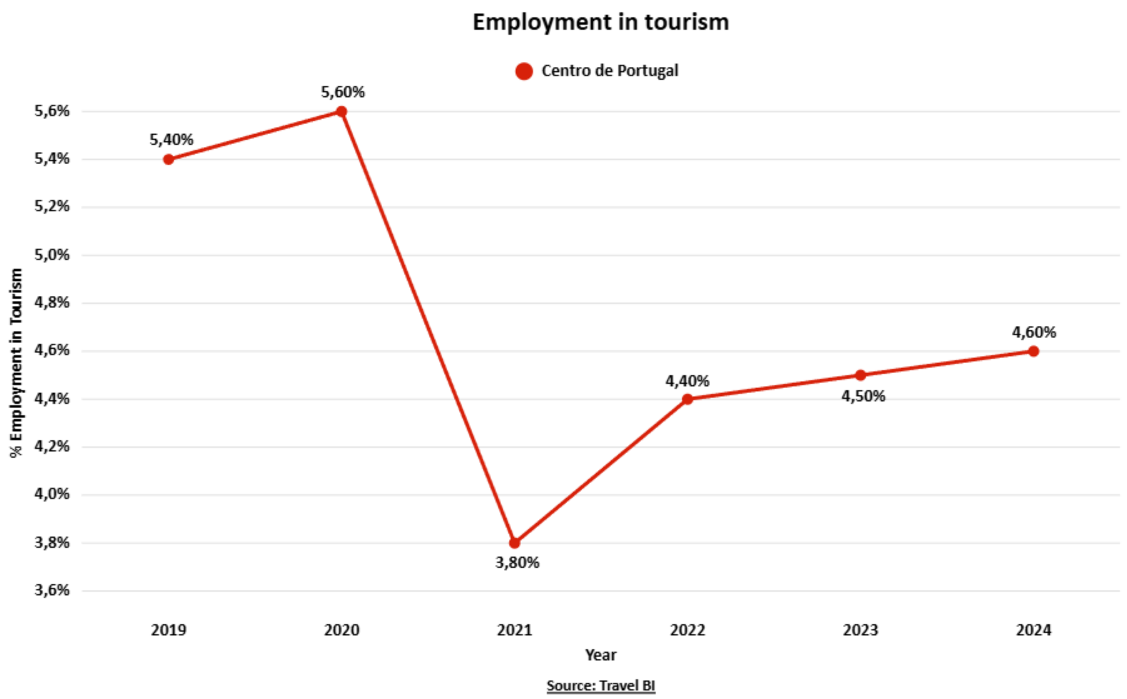


Chart 27 - Employment in tourism in Centro de Portugal (NUTS II), 2019–2024

Demographic structure of employment

Age analysis reveals that a significant proportion of workers in the tourism sector are concentrated in the 15–44 age group. This structure indicates that tourism continues to function as a gateway to the labour market, particularly for young people and adults starting or consolidating their careers.

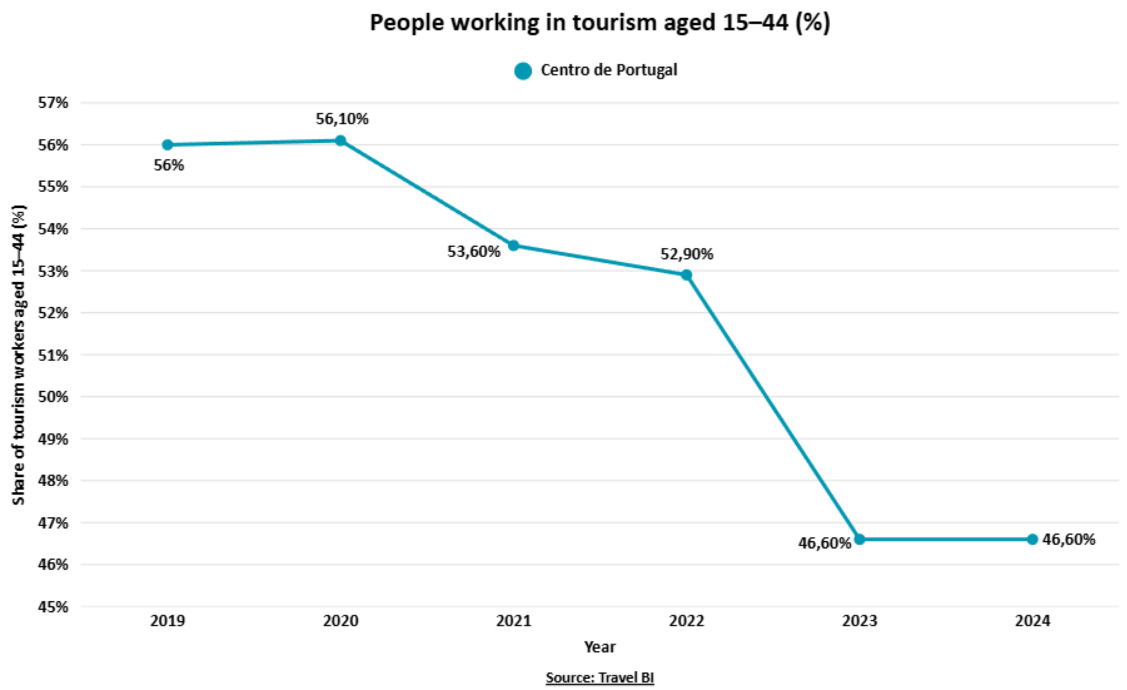


Chart 28 - People working in tourism aged 15–44 in Centro de Portugal (NUTS II), 2019–2024

This characteristic reinforces the social role of the sector, but also highlights greater vulnerability to turnover and precariousness associated with younger profiles.

Workforce qualification

The percentage of workers with secondary or higher education allows us to assess the average qualification level in the sector. The evolution of this indicator over the period analysed suggests a gradual trend towards higher levels of education among tourism workers, which can be partly explained because Centro de Portugal's territory includes two Turismo de Portugal's tourism schools, besides wide offer of university, polytechnic and professional schools with dedicated tourism courses.

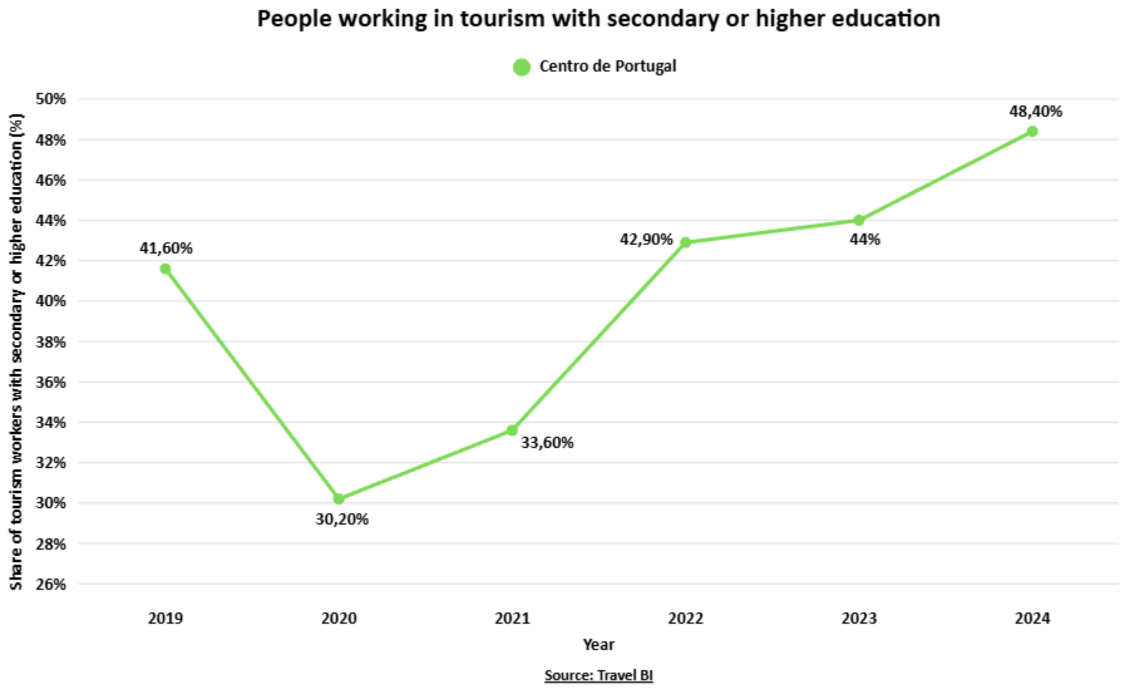


Chart 29 - People working in tourism with secondary or higher education in Centro de Portugal (NUTS II), 2019–2024

This movement is particularly relevant in a context of growing demand for digital, linguistic and tourism experience management skills. Nevertheless, it is important to monitor whether the increase in qualifications is accompanied by salary increases and professional progression - aspects that transcend the mere quantitative dimension.

Gender dimension

The tourism sector has traditionally been characterised by high percentages of women in the total workforce. Despite the irregular figures in the last years, the percentage of women working in tourism remains dominant throughout the series analysed.

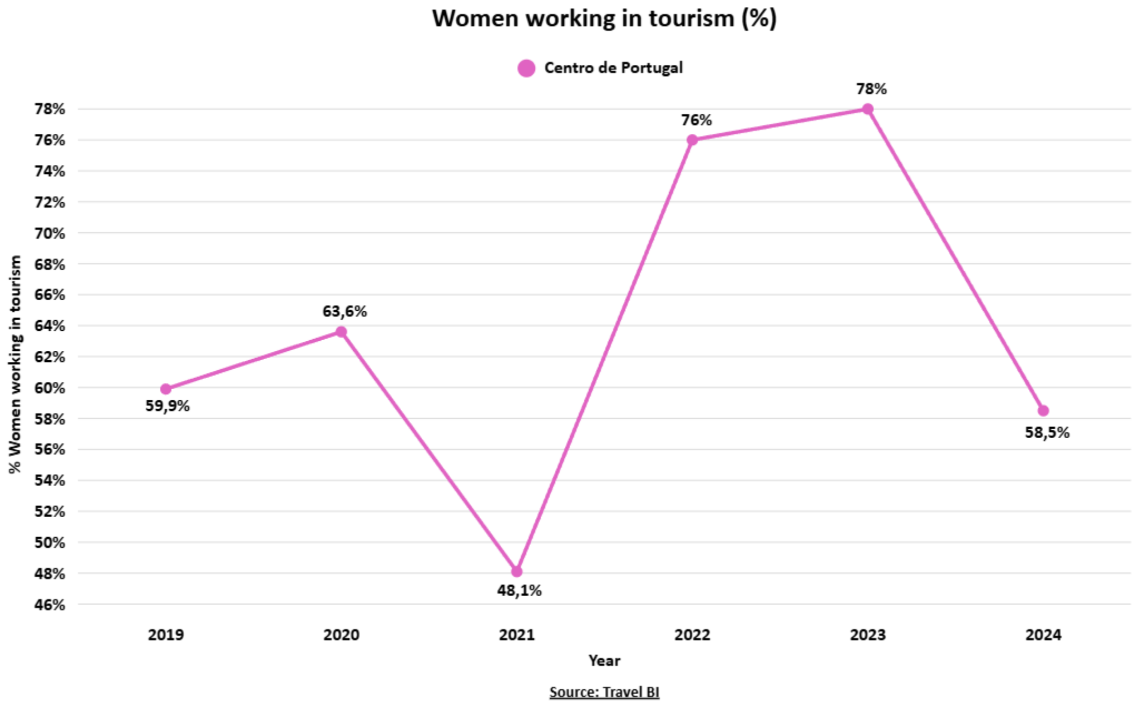


Chart 30 - Women working in tourism in Centro de Portugal (NUTS II), 2019–2024

As gender equality is a key component of sustainable tourism development, from the perspective of social sustainability, a new indicator was included in this year's report, aiming to monitor the percentage of women in management bodies or executive positions, excluding individual businesses. In 2024, in Centro de Portugal tourism related enterprises, 39,56% of management bodies or executive positions were held by women which is not yet close to parity and, when compared to the percentage of women working in tourism, analysed above, is far from being representative.

Employment - Conclusion

Overall, the indicators analysed show that employment in tourism in Centro de Portugal has followed the recovery trend of the tourism sector following the pandemic, with the number of workers growing steadily since 2022. At the same time, there has been a gradual improvement in the average skill level of workers in the sector, reflecting a possible adaptation to the growing demands for skills associated with the tourism industry. Finally, the high proportion of women in the sector is a structural feature of employment in tourism. However, the lower representation of women in leadership positions indicates that challenges regarding gender equality remain.

At the same time, tourism companies have been regularly reporting the lack of available workforce to fulfil their needs, which is a consequence of the aging context that is happening in Portugal and particularly in Centro de Portugal. To mitigate this problem, Turismo Centro de Portugal has begun organizing an annual Tourism employment event in which around 50 tourism companies with job offers, general public searching for a job in the sector, as well as tourism students in the region are invited to participate and meet, in order to promote the match between offer and demand. In 2024, over 900 interested people participated in the event, from 10 nationalities.

Economic Benefits

The economic benefits of tourism are a key aspect of the sector's sustainability. In addition to visitor numbers, it is important to analyse the sector's ability to generate real economic value for the region. Indicators such as total revenue from tourist accommodation, RevPAR and ADR enable us to assess not only the growth of the sector, but also the economic efficiency of the existing accommodation supply. In addition to the common accommodation figures, a new indicator has been added, referring to the weight of each kind of traditional tourism businesses bring to the sector.

Evolution of tourism accommodation revenues

The evolution of tourist accommodation revenues in the Centro de Portugal region between 2019 and 2024 shows a recovery that goes beyond a simple resumption of activity. The sector has not only returned to pre-pandemic levels - it has consolidated a new level of value generation.

In 2019, total revenues amounted to 355,4 million euros. In 2020, the shutdown of activity led to an abrupt reduction to 164,2 million euros. From 2021 (€225,6 million euros), a recovery trajectory began, which gained momentum in 2022 (€388,1 million euros), when revenues clearly exceeded pre-pandemic levels.

The trend continues in 2023 (€464,6 million euros) and culminates in 2024 with €515,3 million euros, the highest figure in the series analysed.

Chart 31 - Total revenue in tourist accommodation in Centro de Portugal (NUTS II), 2019–2024

The observed evolution reveals that the increase in revenue was proportionally higher than the physical growth in demand. This differential indicates an improvement in the economic efficiency of the activity, reflecting a greater capacity to transform tourist demand into effective revenue.

Economic efficiency of tourist accommodation: territorial analysis

However, the overall analysis of revenues hides significant differences across the territory. The ability to generate revenue is not homogeneous among Intermunicipal Communities (CIM), reflecting different levels of tourism maturity, market positioning and specialisation of supply.

In 2024, the highest volumes of revenue were concentrated in:

- Oeste: €115,7 million (€108,4 million in 2023)
- Coimbra Region: €104,1 million (€94,5 million in 2023)

These two territories are consolidating their position as the main economic hubs of regional tourism, translating demand into significant financial returns.

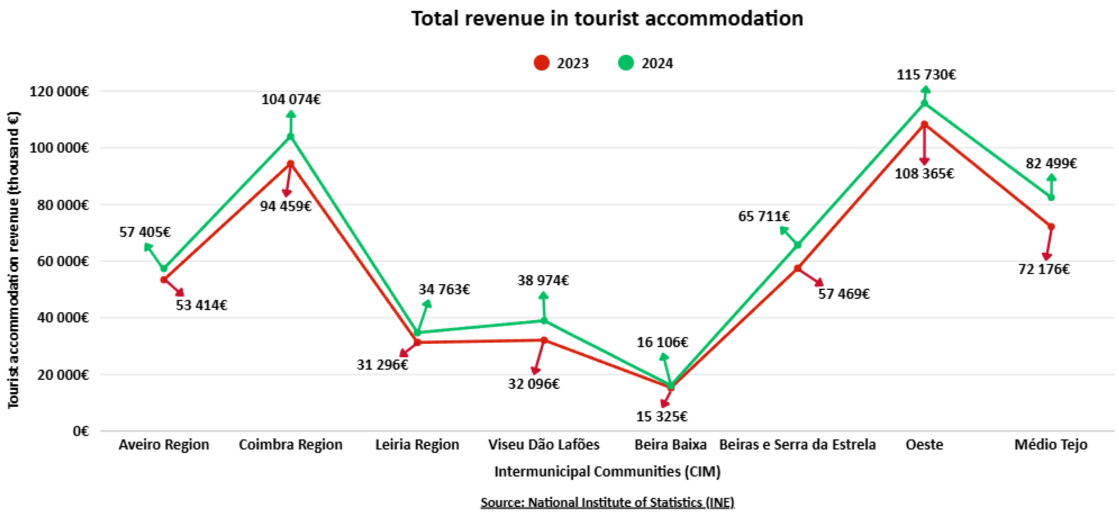


Chart 32 - Total revenue in tourist accommodation in Centro de Portugal (NUTS II), by CIM (NUTS III), 2023–2024

These territorial differences are not only the result of the number of visitors, but also of positioning capacity, the predominant type of accommodation and the profile of the tourism product, something that is clear to detect when crossing this information with the reality that Médio Tejo is the second sub region from Centro de Portugal considering the number of overnight stays.

Price and Revenue Performance

The economic value of the activity becomes even clearer when analysing the performance indicators for tourist accommodation.

RevPAR (Revenue per Available Room) reached €33,30 in 2024, the highest value in the series, up from €31,50 in 2023 and significantly higher than the €24,80 recorded in 2019. After the low point in 2020 (€15,40), the indicator recovered continuously and consistently over four consecutive years, while still far from the national average (€69,40).

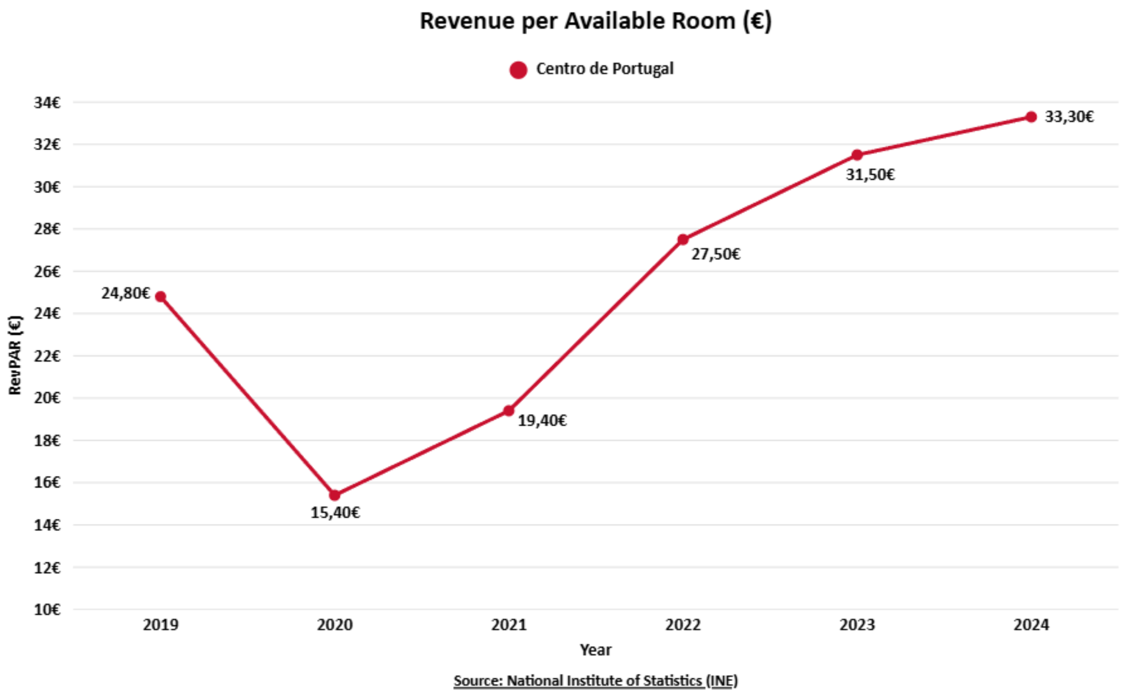


Chart 33 - Revenue per available room (RevPAR) in Centro de Portugal (NUTS II), 2019–2024

The RevPAR trajectory shows that the recovery was not only the result of an increase in the number of guests, but also of a more efficient use of installed capacity. The indicator summarises the combination of occupancy and average price, reflecting the actual revenue-generating capacity per available room.

Economic performance by territory

The aggregate analysis of the Centro de Portugal region, however, masks significant differences between local areas as the sub-regional distribution of RevPAR in 2024 reveals significant variations between inter-municipal communities, from €41,40 in Oeste to €24,80 in Viseu Dão Lafões.

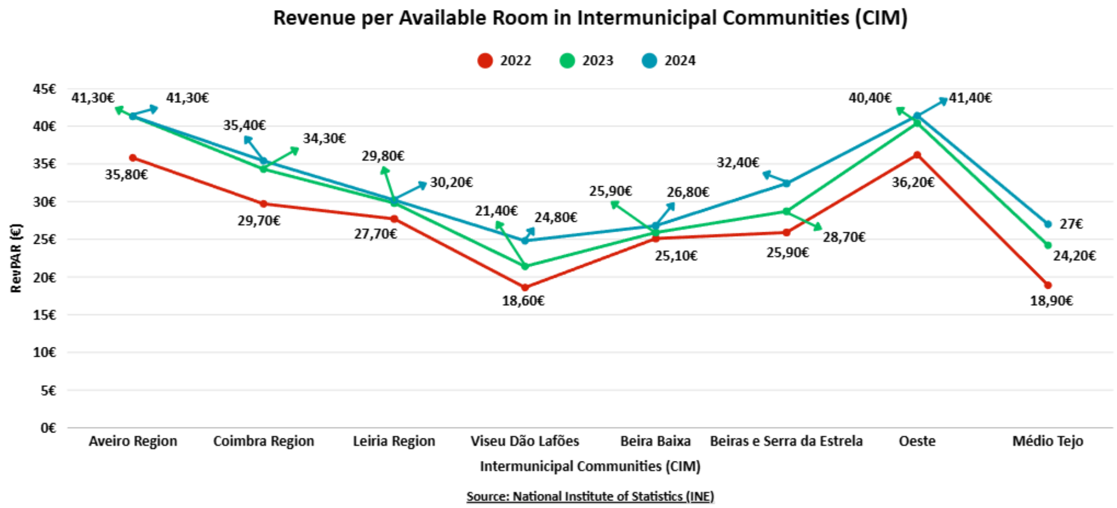


Chart 34 - Revenue per available room (RevPAR) in Centro de Portugal (NUTS II), by CIM (NUTS III), 2022–2024

This dynamic is reinforced by the evolution of the ADR (Average Daily Rate). In 2024, the ADR reached €80,91, surpassing €77,77 in 2023 and clearly positioning itself above the pre-pandemic value of €64,37 in 2019. The growth recorded since 2021 shows a progressive increase in the average price charged at the destination.

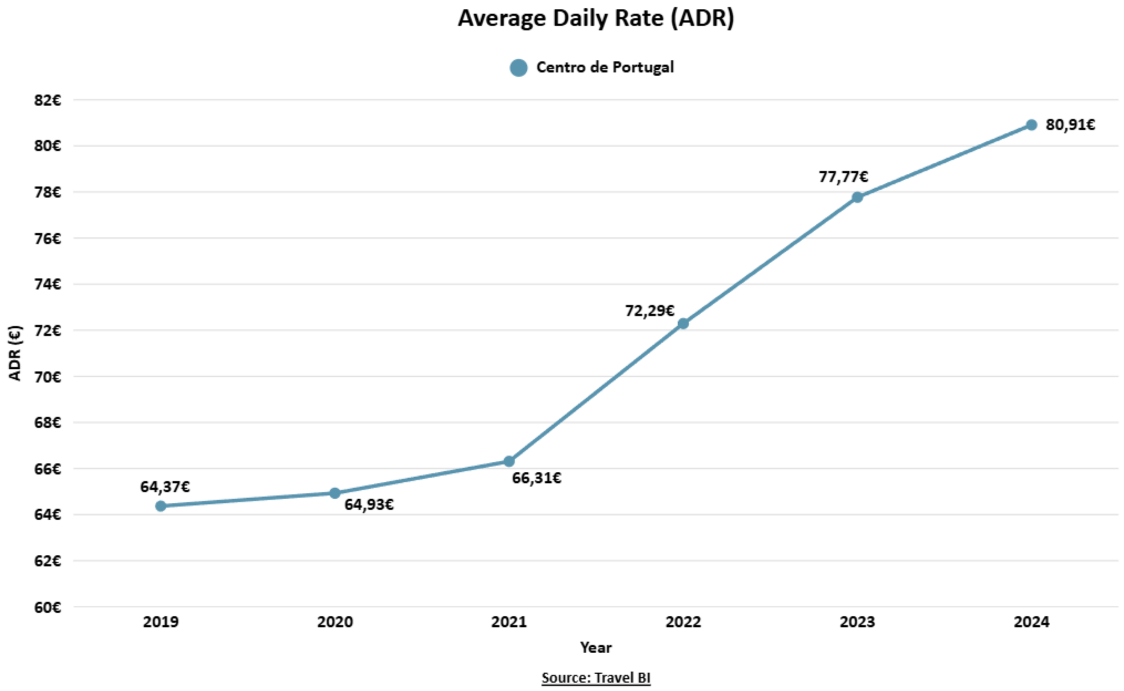


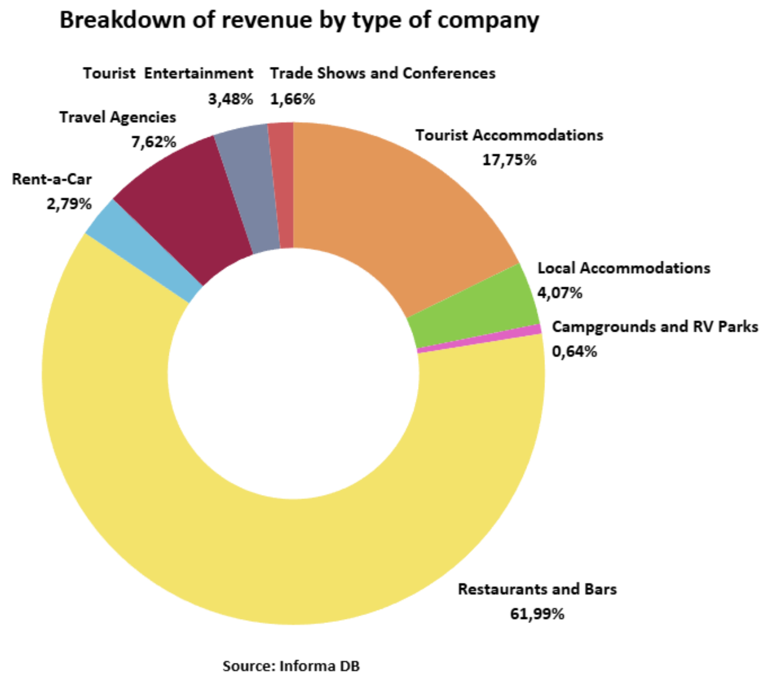
Chart 35 - Average daily rate (ADR) in Centro de Portugal (NUTS II), 2019–2024

The increase in ADR, together with the rise in occupancy, indicates that the destination has managed to raise prices without compromising demand. This behaviour suggests an improvement in competitive positioning and greater recognition of the value of the tourist experience offered.

However, the interpretation of these results requires balance. The rise in average prices may reflect not only an increase in the value of the product, but also an adaptation to rising operating costs, namely energy, labour and raw materials. The sustainability of this trajectory will depend on the sector's ability to maintain competitiveness, quality of supply and positive perception by visitors.

Overall, the evolution of RevPAR and ADR confirms that the Centro de Portugal region has strengthened its ability to generate economic value per unit of supply. Recent growth is not limited to volume - it translates into a progressive consolidation of a model geared towards greater value creation, despite the gap between the destination's performance and the national average in both indicators.

Despite the relevance of the accommodation sector within tourism, other areas of activity must be considered in order to fully grasp the whole picture of economic benefits generated by tourism enterprises in the region. Data collected from national enterprise provider Informa DB, that analyses all economic reports of tourism businesses, except the individual businesses, shows that accommodation sector (including hotels, rural tourism, local accommodation and camping sites) generate only 22,4% of the revenues, while restaurants represent 61,99% of the revenue generated in Centro de Portugal, while other areas such as travel agencies (7,62%) congresses and animation (5,14%) and car rentals (2,79%) hold lower relevance in a partial universe of 2.500 million euros of the revenue in the destination.



Interpretation of economic benefits in the territory

The territorial analysis confirms that the economic benefits of tourism in Centro Portugal are not distributed evenly. Overall revenue growth does not eliminate structural asymmetries between the coast and the interior, nor between territories with greater density of supply and emerging territories.

Territories with a higher concentration of tourist infrastructure, better accessibility and greater brand awareness are able to capture a more significant share of the value generated by the activity. In contrast, smaller areas maintain lower levels of revenue, even when they record significant percentage growth. At the same time, destinations like Médio Tejo, which holds the most international tourist profile and is the second (among eight regions) in number of overnight stays, holds also one of the lowest revpar figures. This reality poses a series of strategic challenges to address both at regional and local level.

Economic Benefits - Conclusion

The growth recorded in 2024 is a clear sign of the sector's economic robustness. However, the consolidation of a sustainable model will depend on the ability to transform this growth into more balanced and structurally resilient territorial development. As economic benefits are a key area to every destination, considering that tourism depends on the capacity of businesses to develop their activity, creating jobs and adding value to the territory in all kinds of domains, Turismo Centro de Portugal created a dedicated service to aid public and private investors, in 1999, within a starter program developed by Turismo de Portugal.

This service evolved into a division (Tourism Investment Support Division - NAIT) within Turismo Centro de Portugal, wich is now responsible for individual support to all tourism investors in the region and, as an expectation from interested parties, was also the developer of the Observatory in Centro de Portugal. This service, in 2024, answered to 1.310 requests for information, with a client's satisfaction level of 87,8%, and its representatives participated in 20 public sessions aiming to inform about tourism law, funding, tourism monitoring among other matters relevant to investors.

Energy Management

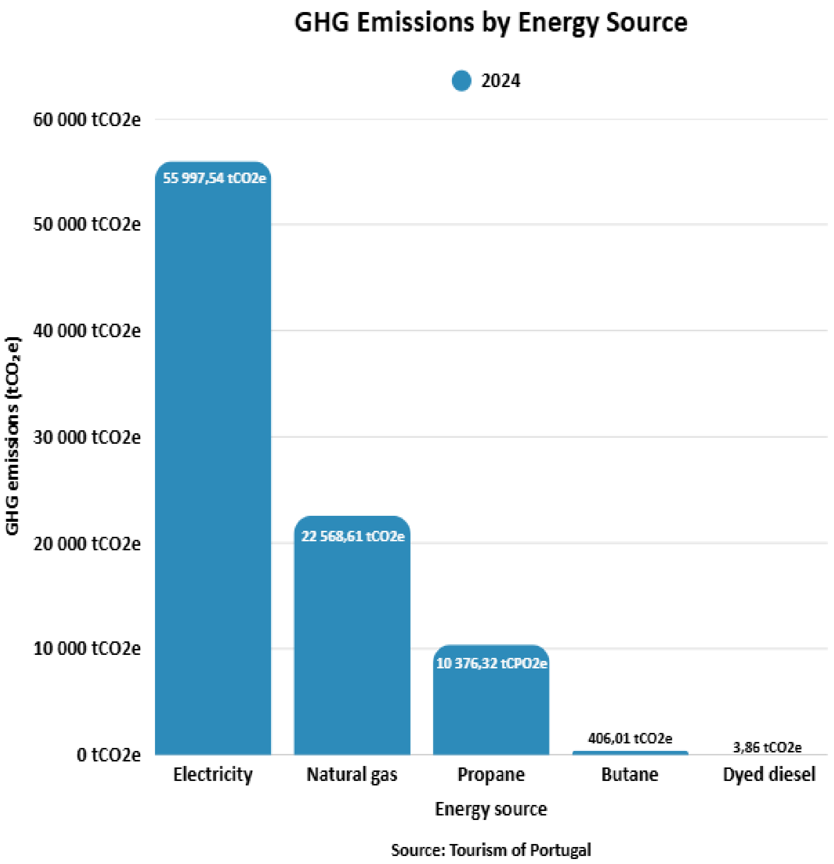
Energy management is a key aspect of tourism sustainability in Centro de Portugal, given its direct relationship with greenhouse gas (GHG) emissions, the sector's operating costs and national and European decarbonisation commitments.

In a context of consolidated growth in tourism activity in 2024, pressure on the regional energy system remains significant. The analysis of this thematic area focuses on two complementary dimensions: the structure of emissions associated with energy consumption; and the adoption of energy optimisation practices in tourist accommodation.

Greenhouse Gas Emissions Associated with Energy (2024)

In 2024, total GHG emissions associated with energy consumption in the Centro de Portugal region amounted to 89.352,36 tCO_2e.

The breakdown by energy source shows the following structure:



Electricity accounts for approximately 63% of total emissions, constituting the main contribution to the regional energy carbon footprint.

Energy Consumption Optimisation in Tourist Accommodation

Turismo de Portugal conducts a regular annual survey dedicated to the evaluation of the accommodation sector performance regarding its environmental performance. One of the subjects under analysis is Energy Consumption Optimisation which, in Centro de Portugal, shows a positive trend in the adoption of energy efficiency practices during the last three years, as the percentage of establishments implementing energy consumption optimisation measures has grown consistently:

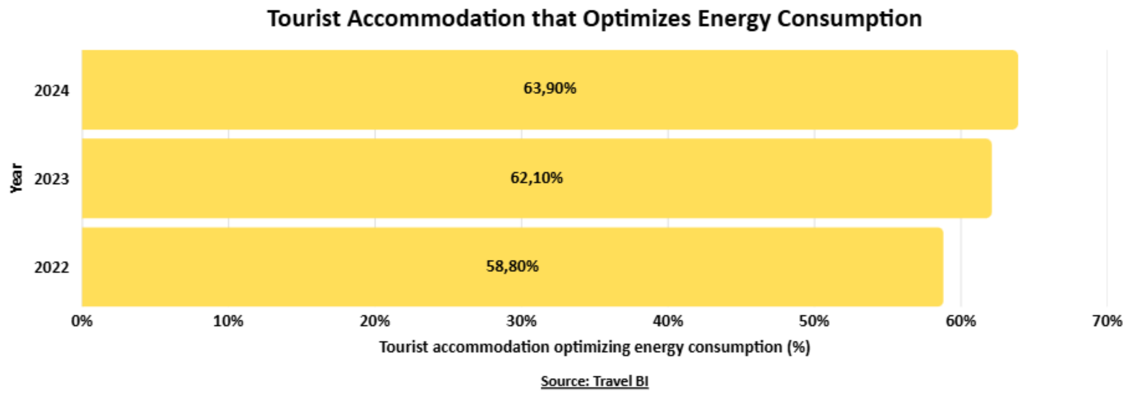


Chart 38 - Tourist accommodation establishments optimizing energy consumption in Centro de Portugal (NUTS II), 2022–2024

The cumulative increase over the period reveals a trend towards the consolidation of energy efficiency practices in the sector. These measures include, among others, replacement with more efficient equipment, consumption monitoring and control systems, LED lighting, improvements in thermal insulation and, in some cases, integration of renewable energies.

Energy Management - Conclusion

The available information shows, on one hand, that more accurate data is needed to evaluate the destination performance and plan for action, and, on the other hand, that, regarding the available data on the businesses performance, there is significant room for improvement in disseminating good practices in this field to the regional businesses, particularly in a territory where the dispersion of supply and the lower average size of enterprises can limit the capacity to invest in more technically demanding solutions.

Water Management

Water management is a critical dimension of tourism sustainability in Centro de Portugal, particularly in a context marked by increasing pressure on water resources, climate variability and recurring episodes of drought. The analysis of this thematic area focuses on two complementary dimensions: the adoption of measures to optimise water consumption in tourist accommodation; and the quality of bathing water as an indicator of the environmental pressure associated with tourism.

Optimisation of water consumption in tourist accommodation

Considering the annual Turismo de Portugal's Survey on Environmental Performance, the percentage of tourist accommodation establishments implementing measures to optimise water consumption is relatively high, albeit with some recent fluctuation. The figures recorded are as follows:

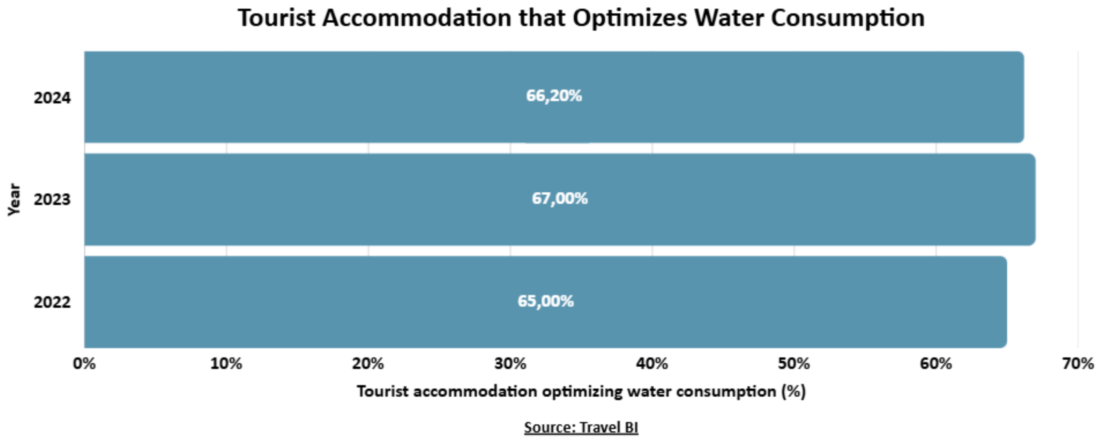


Chart 39 - Tourist accommodation establishments optimizing water consumption in Centro de Portugal (NUTS II), 2022–2024

The evolution between 2022 and 2023 reveals a slight increase in the adoption of water efficiency practices. In 2024, there is a small reduction compared to the previous year, but it still remains above the initial value of the series.

This indicator suggests that around two-thirds of regional tourist accommodation incorporates measures such as flow reduction devices; Water reuse systems; water consumption monitoring; or raising guest awareness of responsible use.

However, the fact that approximately one-third of establishments do not report water optimisation practices in 2024 shows significant room for improvement, especially in a scenario where increased tourist activity may intensify pressure on local supply systems.

Bathing water quality

Bathing water quality is another indicator of the sustainability of water management and the environmental pressure associated with tourism, particularly in coastal and inland areas with bathing facilities. The percentage of bathing waters classified as 'Good' or 'Excellent' has evolved as follows:

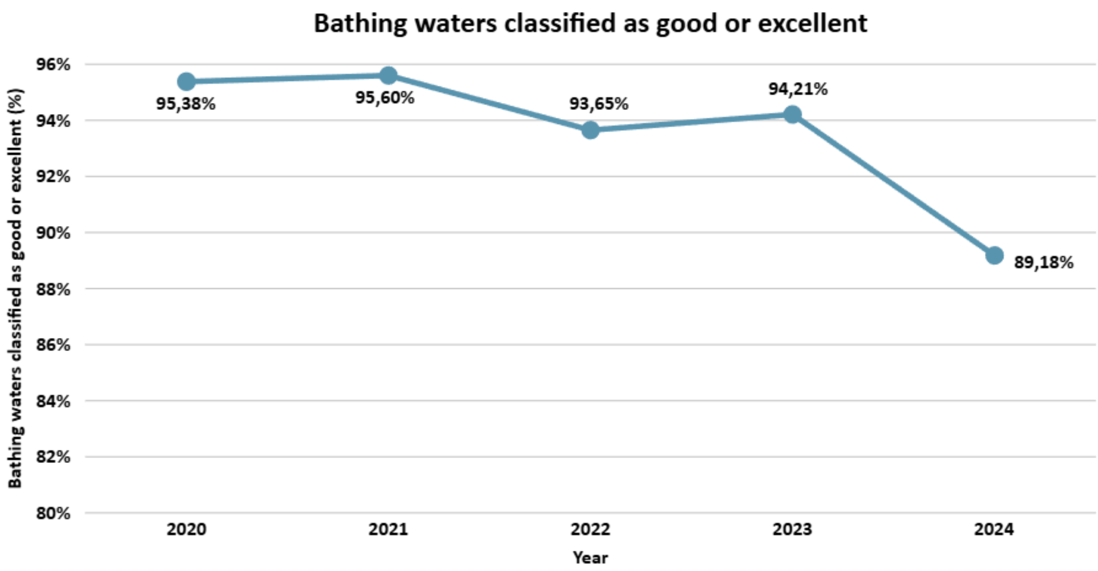


Chart 40 - Bathing waters classified as good or excellent in Centro de Portugal (NUTS II), 2020–2024

After four years with values above 93,65% (lowest figure in 2022 in this series), in 2024 Centro de Portugal recorded 89,18% of Bathing Waters classified as good or excellent. Although most bathing waters remain classified at very positive levels, the sudden reduction in 2024 warrants attention, meaning the trend should be monitored, determining the specific reasons in each case that led to the overall reduction, especially in a context of consolidated growth in tourist activity.

Water Management - Conclusion

Both of the indicators monitored show a drop in the values for 2024, which can't be considered as a good sign, although it might be caused by the increase of the universe, being respondents to the survey or number of beaches, respectively, whose current level of involvement with environmental matters is still starting.

In the case of the accommodation businesses, the decrease could be caused by the increase of new respondents to the survey, small sized enterprises with small human resources workforce, difficulties to finance internal interventions or lack of information (Turismo Centro de Portugal might have an important role in the last two).

Regarding the evaluation of water quality in beaches, the 2024 figure might reflect multiple factors, including increased seasonal pressure, adverse weather conditions, extreme events and their consequences or diffuse pressures on drainage and treatment systems.

The downward trend in 2024 should be monitored with particular care, with a case to case analysis, which is feasible considering the universe studied in these indicators.

Waste Water Management

Proper wastewater management is a critical aspect of tourism sustainability and is directly linked to environmental protection, water quality, public health and the preservation of local ecosystems. Tourism generates significant volumes of wastewater, the correct collection, treatment and discharge of which is essential to mitigate negative impacts on the territory and resident communities.

In the context of tourism, wastewater results from multiple activities carried out in tourist establishments, including kitchens and restaurants, sanitary facilities, housekeeping services, laundries and other operations associated with the daily functioning of accommodation units. Without proper treatment, this water can contribute to the degradation of surface and groundwater quality, affect sensitive aquatic ecosystems and pose risks to human health, fauna and flora.

In Centro de Portugal, this dimension is particularly relevant due to the region's territorial diversity, the coexistence of densely populated urban areas with low-density rural areas, and the presence of environmentally sensitive areas, including river basins, protected areas, and reservoirs with multiple functions. The pressure exerted by tourism on sanitation systems can vary significantly between sub-regions, depending on the concentration of demand, seasonality, and the installed capacity of wastewater treatment infrastructure.

Despite the strategic importance of this dimension, systematic and territorially disaggregated monitoring of wastewater management associated with tourism currently faces limitations in terms of the availability of specific indicators. In particular, there is still a lack of consolidated data that would allow for a direct and comparable assessment of the proportion of tourist establishments connected to adequate treatment systems, the efficiency of these systems, or the additional pressure exerted by tourism on existing sanitation infrastructure.

However, and considering the importance of this matter within INSTO context, two initial indicators were monitored, aiming for further development in future annual reports. The data available is from 2022 and 2023 and it shows that, in 2023, 153.532.791 m3 of waste water were treated in Centro de Portugal, via different levels of treatment that were not entirely monitored by sub region. When trying a comparison between 2022 and 2023, there are two out of eight sub regions in Centro de Portugal whose results are not public. Considering only the six sub regions where the results of both years are available, there was a 9,8% increase in the volume of treated waste water. Another starter indicator for this issue area is the number of waste water treatment stations which, in 2023, in Centro de Portugal was 1.072, which constituted 36,9% of all facilities of this kind in Portugal.

Waste Water Management – Conclusion

After creating two general indicators about this issue area, regarding the capacity and performance of Centro de Portugal region as a whole, future efforts will focus on trying to understand the specific stakeholders regarding this matter regionally and evaluate the possibility to evolve to more tourism related indicators for the next annual report.

Solid Waste Management

Solid waste management is a central dimension of tourism sustainability, given the direct relationship between activity intensity, consumption patterns and pressure on municipal collection and treatment systems.

In a context of consolidated tourism demand in 2024, the analysis of this thematic area focuses on three fundamental dimensions: waste generation associated with tourism; behaviour of accommodation establishments; and incorporation of circular economy principles.

Waste Generation Associated with Tourism

In 2024, solid urban waste attributed to tourism in the Centro de Portugal region totalled 2.635 tonnes. The share of waste generated related to Tourism was 0,2%, which was the same figure that was monitored in 2023.

The stability in the share in 2024, in a year of growth in tourist activity, is a positive sign. This behaviour suggests a possible improvement in waste management efficiency or a lower intensity of generation per visitor.

However, the absence of a longer time series prevents a consolidated structural reading. Future monitoring should make it possible to assess whether this reduction corresponds to a consistent trend or a one-off fluctuation.

Waste Separation in Tourist Accommodation

Another indicator provided by the annual Turismo de Portugal’s Survey on Environmental Performance is the percentage of accommodation that implemented waste separation in their establishments, which shows a direct indicator of the sector's involvement in the responsible management of waste flows.

Chart 41 - Tourist accommodation establishments separating waste in Centro de Portugal (NUTS II), 2022–2024

In 2024, 66,70% of tourist accommodation establishments reported separating waste, indicating that approximately two-thirds of tourist accommodation incorporates basic environmental management practices. However, around one-third of establishments still do not report waste separation, highlighting significant room for improvement. Also, during the three years monitored in this series, Centro de Portugal was the region with the lowest percentage in Portugal, which might be explained with the nature of the region's supply, which is dispersed and heterogeneous, making the consolidation of universal waste separation practices a significant operational challenge, particularly in smaller enterprises.

Circular Economy Practices

In addition to waste separation, the annual Survey on Environmental Performance also focus on the adoption of measures associated with the circular economy, which generally represents a more advanced stage of environmental maturity. In 2024, 73,50% of tourist accommodation establishments reported implementing circular economy measures, including reducing food waste, reuse of materials, replacement of disposable items, sustainable purchasing and connection to short supply chains.

Solid Waste Management - Conclusion

The 2024 scenario reveals a scenario of progressive integration of environmental practices in the tourism sector, but still with significant asymmetries. However, the consolidated growth of tourism activity means that the potential pressure on municipal waste systems will continue to be significant. Future sustainability will depend on the ability to generalise separation practices across the entire sector, reducing waste generation at source and strengthening coordination between tourism operators and municipal authorities.

Environmental issue areas and indicators are the most challenging ones when it comes to the Centro de Portugal Observatory annual report, as it depends almost totally on Turismo de Portugal's annual survey, which is partial (only dedicated to accommodation and within accommodation only to hotels), and there is no access to the results, which could allow to plan and create training programs to the establishments which still are not open to start more sustainable actions in their daily practices. Developing the cooperation with Turismo de Portugal is crucial for the success of this data collection strategy, aiming for a bigger participation of businesses in the enquiries, including adding new types of businesses, given the natural connection to regional enterprises provided by the investment support services.

Climate Action

Climate action in Centro de Portugal is a fundamental feature of the sustainable tourism development strategy, combining business commitment, environmental qualification and strengthening territorial resilience. The call to action must be integrated in the daily actions of both public and private sectors in a region that has suffered consecutively from wildfires, storms, water scarcity and floods for the past years, affecting the landscape, the businesses and the families.

In a context of consolidation of tourism activity in 2024, the ability to align economic growth with climate responsibility becomes crucial for the medium and long-term sustainability of the destination.

Business Commitment to Climate Responsibility

The 360º Program was created by Turismo de Portugal with the goal of placing tourism businesses at the core of the action towards sustainability, creating a tool that allows them to monitor and report indicators and goals aligned with the SDG's regarding social, environmental and economic features.

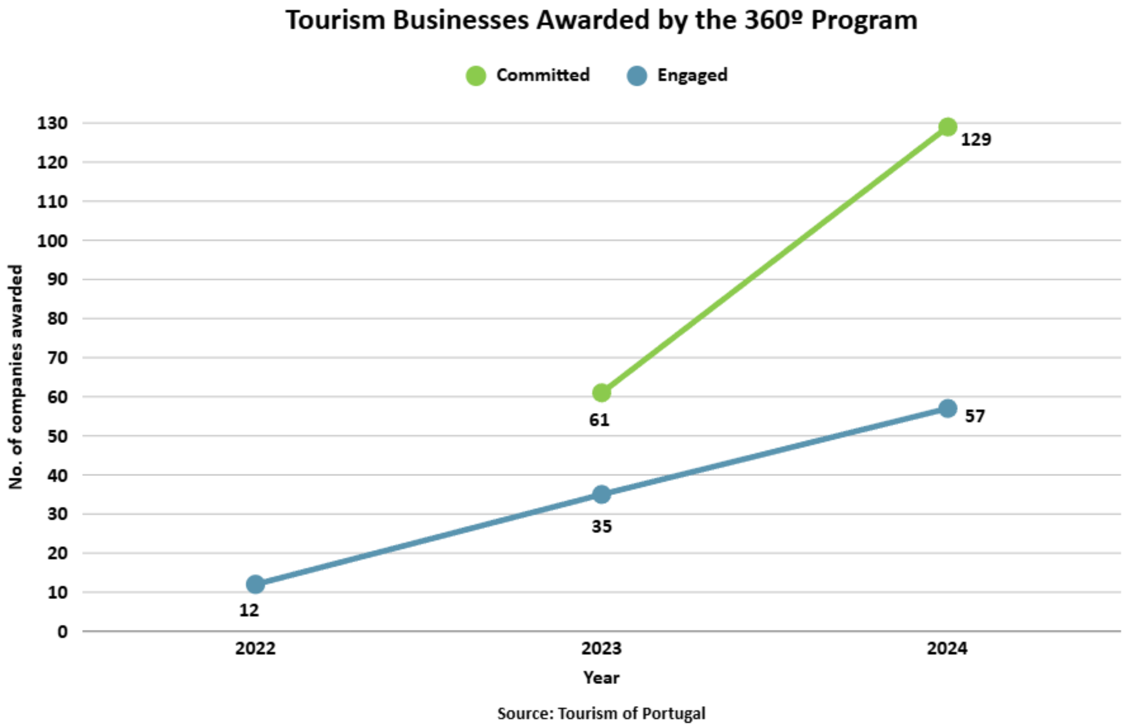


Chart 42 - Number of tourism businesses awarded by the 360º Program in Centro de Portugal (NUTS II), 2022–2024

This programme has established itself as one of the key environmental certification schemes in the tourism sector. Since the beginning of the program, in Centro de Portugal, the growth is quite significant: the number of companies classified as “Committed” rose from 61 in 2023 to 129 in 2024, more than doubling in a single year. Meanwhile, the “Engaged” level increased from 35 to 57 companies over the same period, maintaining a consistent growth trajectory since 2022.

This growth reflects companies' increasing adoption of sustainability practices, particularly in terms of energy efficiency, resource management and the implementation of structured environmental measures.

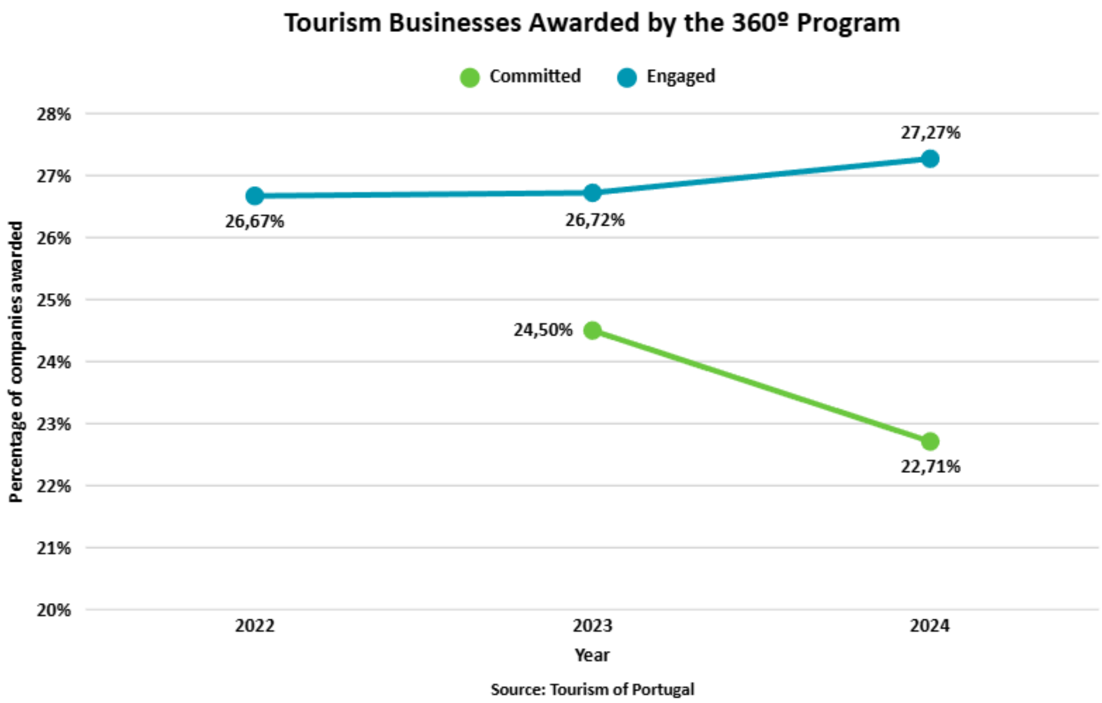
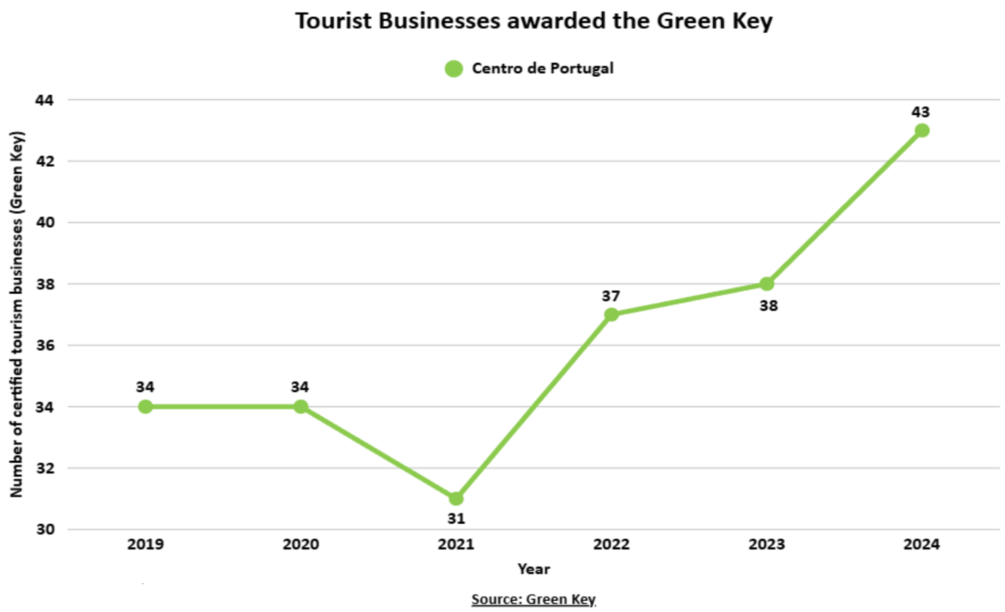


Chart 43 - Share of tourism businesses awarded by the 360º Program in Centro de Portugal (NUTS II), 2022–2024

When analysing the proportion of companies covered, the picture becomes more balanced. The percentage of companies classified as "Engaged" rises slightly from 26,67% in 2022 to 27,27% in 2024, whilst the "Committed" category falls from 24,50% in 2023 to 22,71% in 2024.

In addition to the 360° Programme, there has also been a positive trend in the adoption of internationally recognised environmental certifications. In the case of Green Key, the number of businesses remained stable at 34 between 2019 and 2020, fell to 31 in 2021, but recovered steadily to reach 43 establishments in 2024, the highest figure for the period.



Even more striking is the growth in Biosphere certifications, which rose from 11 companies in 2019 and 2020 to 13 in 2021, before rising rapidly to 34 in 2022, 82 in 2023 and 87 in 2024. This increase highlights a sharp acceleration in the adoption of more demanding and structured sustainable management models.

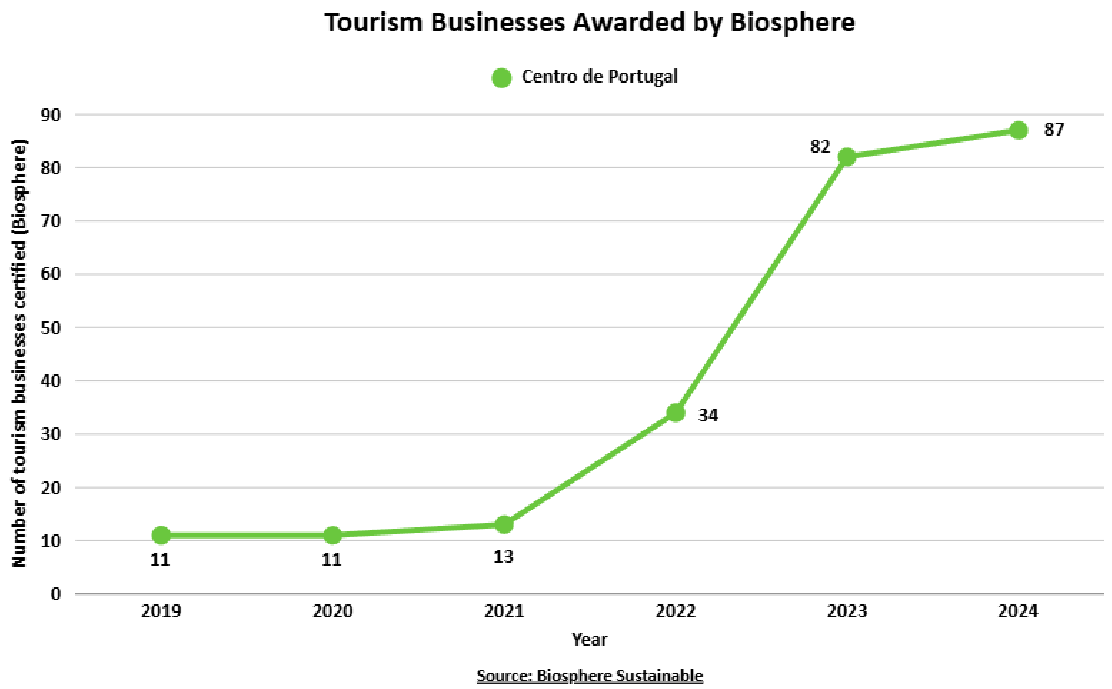


Chart 45 - Number of tourism businesses awarded by Biosphere in Centro de Portugal (NUTS II), 2019–2024

At the local level, municipalities are also following this trend. The number of municipalities awarded the ECO XXI prize rose from 19 in 2019 to 24 in 2021, fell slightly to 23 in 2022, but rose again to reach 27 in 2023, before stabilising at 26 municipalities in 2024.

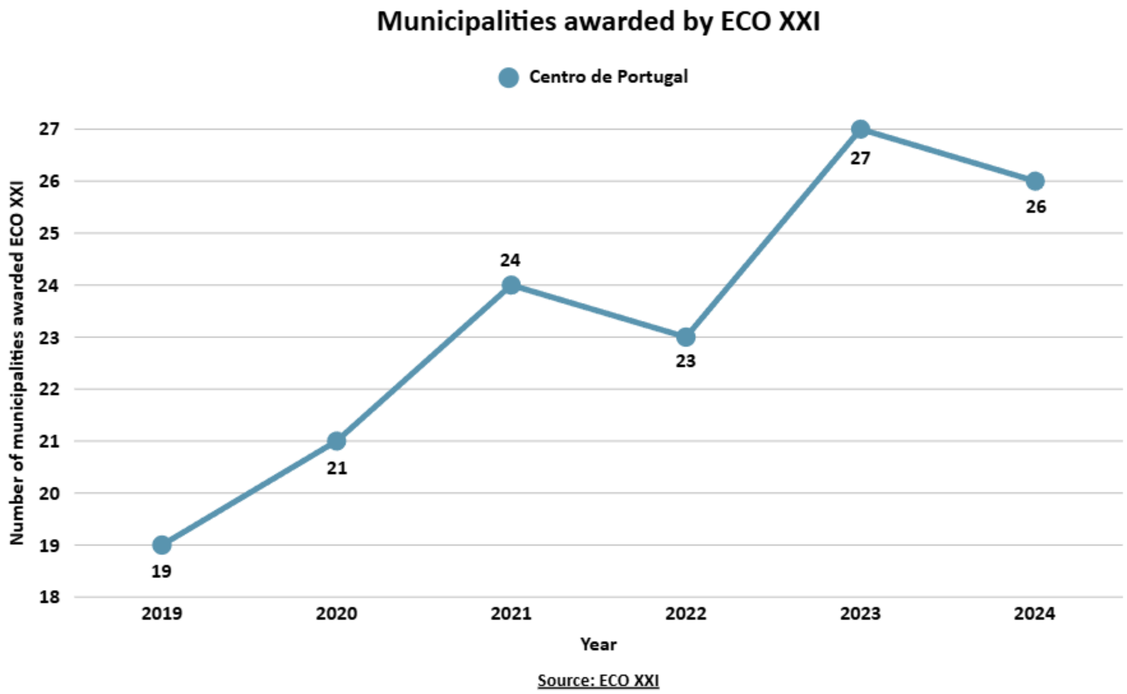


Chart 46 - Number of municipalities awarded by ECO XXI in Centro de Portugal (NUTS II), 2019–2024

Taken as a whole, the data shows a clear trend: more companies and more regions are adopting sustainable practices. However, a closer look at the figures highlights an important point: whilst growth is evident, it is not yet widespread enough to transform the entire sector, especially among private businesses (less than 300 hundred in an universe of over 10.000).

Environmental Quality and Territorial Resilience

The environmental quality of the territory is an essential pillar of climate action, especially in a context of more frequent extreme events and pressure on coastal and inland areas.

There is a growth trajectory until 2022, followed by slight fluctuations in the following two years, but still remaining above pre-pandemic levels. The number of Blue Flag beaches has evolved as follows:

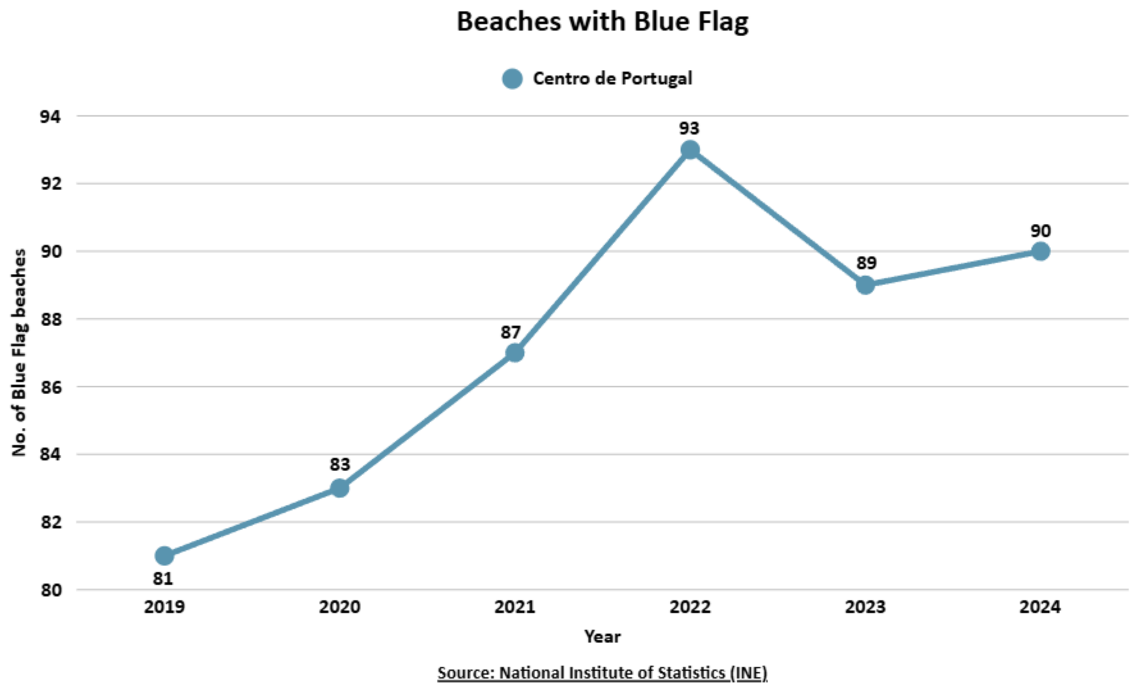


Chart 47 - Number of beaches with Blue Flag in Centro de Portugal (NUTS II), 2019–2024

The maintenance of high levels of environmental qualification reflects continued investment in coastal management and water quality, which are particularly relevant in a climate change scenario.

Exposure to External Climate and Market Risks

Dependence on the three main long-distance markets is also a relevant indicator in assessing climate action, given that greater international exposure implies greater sensitivity to global risks, including economic and geopolitical instability and extreme weather events.

After the sharp decline in 2020 and 2021, a gradual recovery is observed, reaching a value slightly higher than the pre-pandemic period in 2024.

The evolution recorded was as follows:

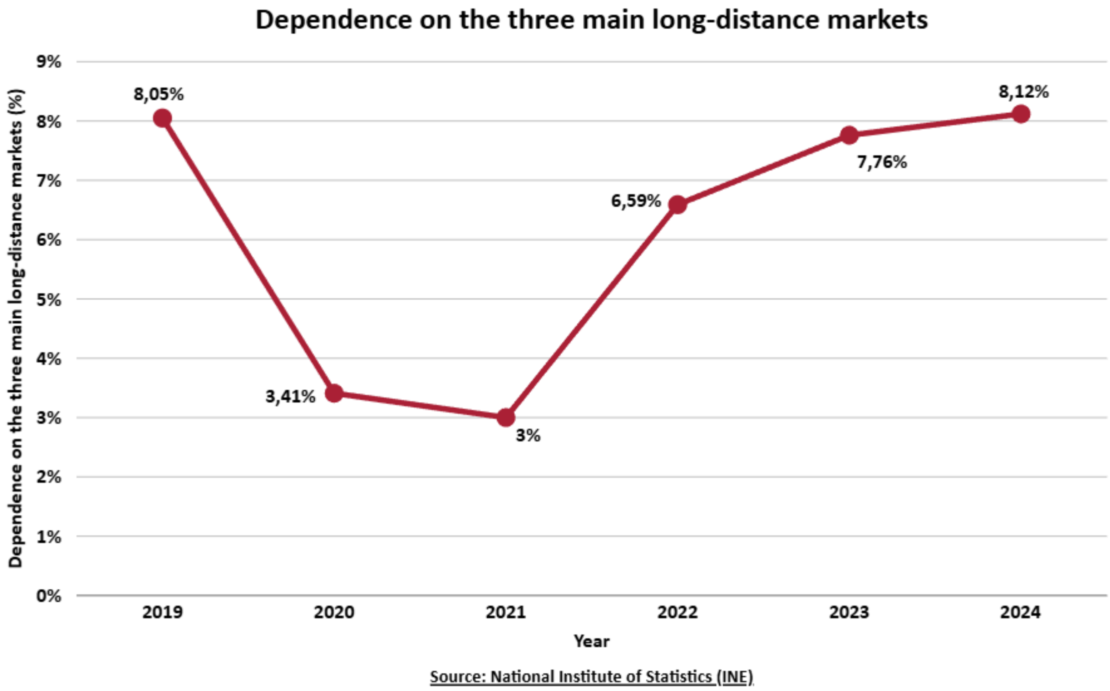


Chart 48 - Dependence on the three main long-distance markets in Centro de Portugal (NUTS II), 2019–2024

This behaviour demonstrates greater international integration of the destination, but, if the tendency to grow remains, also greater exposure to external factors that can influence tourist flows and emissions associated with long-distance mobility. The top 3 markets had some fluctuations, with Brazil being the most relevant between 2019 and 2022, after being dethroned by the United States in 2023 and 2024. Besides the dominance of these two markets during the studied period, South Korea was the third in 2019, before Poland became the third more relevant among long distance markets, in observance of the criteria followed by Turismo de Portugal.

Climate Action – Conclusion

The 2024 picture shows a destination in a phase of consolidation regarding climate action, showing growth adherence to structured sustainability programmes, including progressive integration of circular practices. However, structural challenges remain. The consolidation of tourism growth requires that business commitment evolve from voluntary adherence to systemic integration, ensuring coherence between economic growth, environmental quality and climate resilience.

Turismo Centro de Portugal developed a project named Centro Sustentável, which was financed by Turismo de Portugal, aiming to the sustainable development of the destination, which took place between 2020 and 2023, whose effects are still being felt in the region's tourism enterprises. Between the multiple actions developed, there were training sessions for businesses regarding themes like preventing food waste or single used plastics, creation of digital good practices guides for businesses and tourists or, above all, a partnership with Biosphere Portugal that allowed free access to certification schemes to tourism businesses in the region, which was one of the main reasons for the spike that occurred in that indicator in the past two years. Above all, the project allowed for the first steps to be taken with a common vision regarding sustainable goals, as all relevant stakeholders were included in the process.

Accessibility

Accessibility is an essential dimension of tourism sustainability, reflecting the destination's ability to ensure equal access, social inclusion and quality of experience for all visitors, considering also the aging of the population not only in Portugal as well in the markets that are fundamental for the touristic demand in Centro de Portugal.

In Centro de Portugal, the analysis of accessibility focuses on three main dimensions:

- adapted accommodation capacity;
- proportion of accessible rooms;
- beach accessibility.

Accessible Accommodation Capacity

Between 2019 and 2024, the number of accessible rooms increased consistently from 764 to 934, representing a sustained upward trend over the entire period.

This evolution reflects a continuous effort to adapt tourism infrastructure to the needs of visitors with reduced mobility, with particularly strong growth observed between 2022 and 2023 (+49 rooms) and a further increase in 2024, which registers the highest value in the series, reinforcing the trajectory of progressive improvement in accessibility conditions across the destination.

Overall, the trend clearly suggests that accessibility has been gaining relevance in the development of the region's tourism offer, consolidating itself as a structural dimension rather than a fluctuating one.

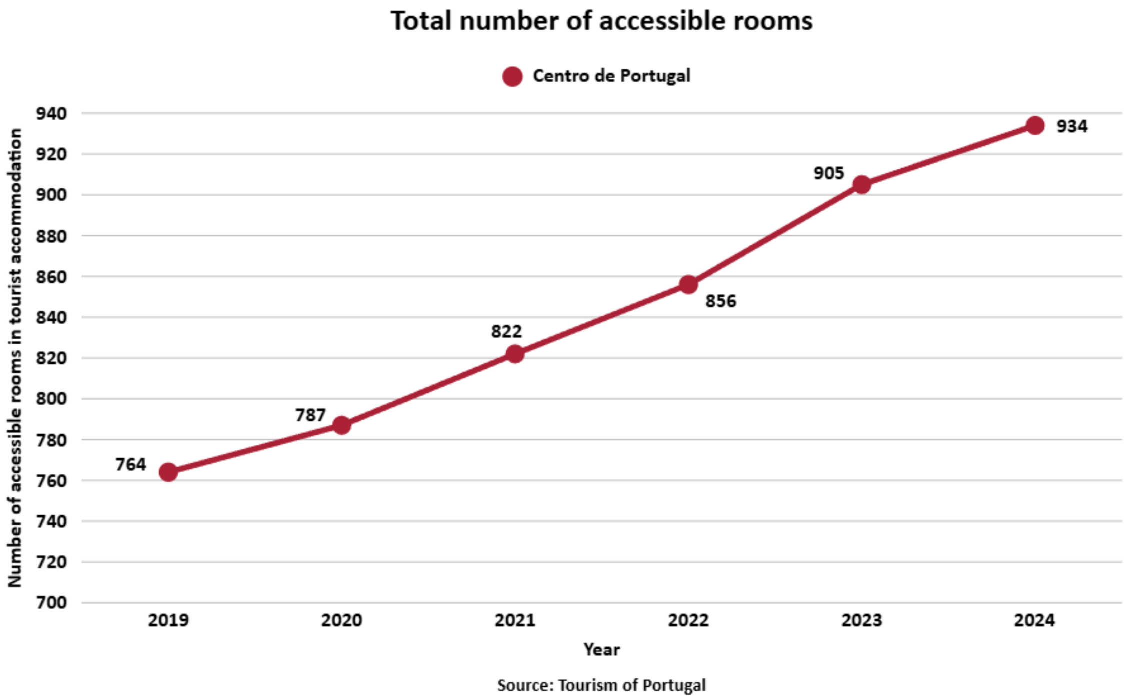


Chart 49 - Total number of accessible rooms in tourist accommodation in Centro de Portugal (NUTS II), 2019–2024

Percentage of Accessible Rooms

Despite the continuous increase in the absolute number of accessible rooms, their relative weight in the total accommodation supply remains largely stable throughout the period.

Between 2019 and 2022, accessible rooms consistently represented around 3,0% to 3,1% of total capacity. In 2023, this proportion increased slightly to 3,3%, remaining unchanged in 2024.

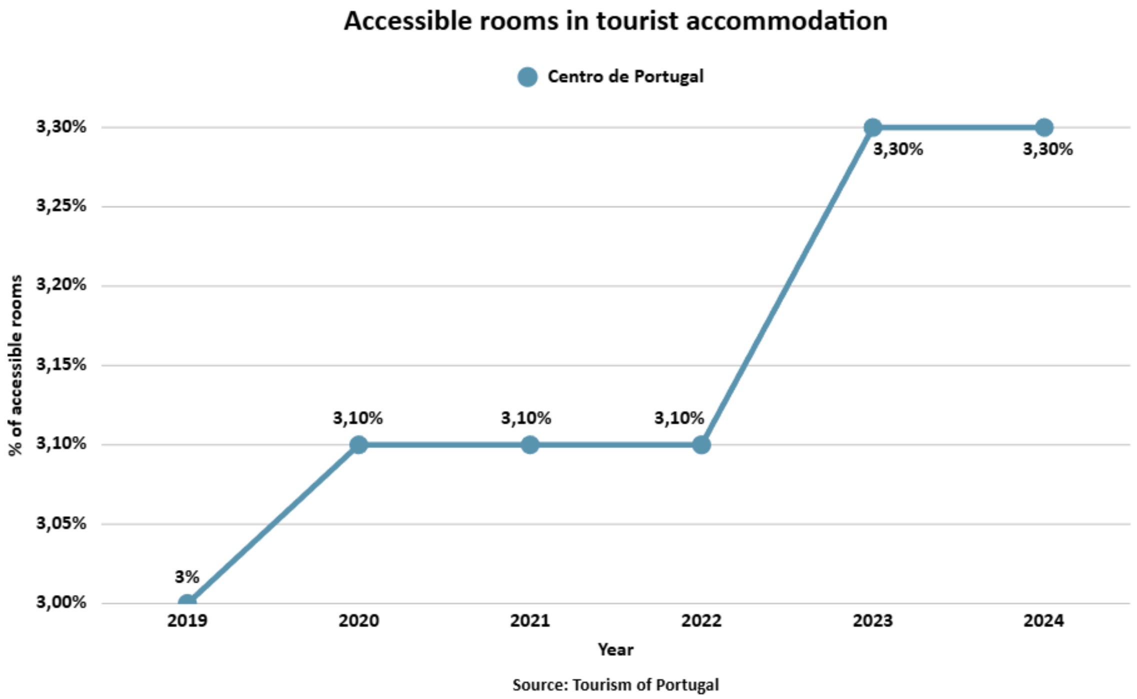


Chart 50 - Share of accessible rooms in tourist accommodation in Centro de Portugal (NUTS II), 2019–2024

This pattern indicates that the growth in accessible accommodation has broadly kept pace with the overall expansion of the tourism supply, rather than outpacing it.

As a result, accessibility continues to evolve in a gradual manner within the destination. While there is clear progress in absolute terms, its relative expression suggests that it is not yet a fully structural or differentiating component of the regional tourism offer.

Accessible Beaches

The number of accessible beaches has evolved as follows:

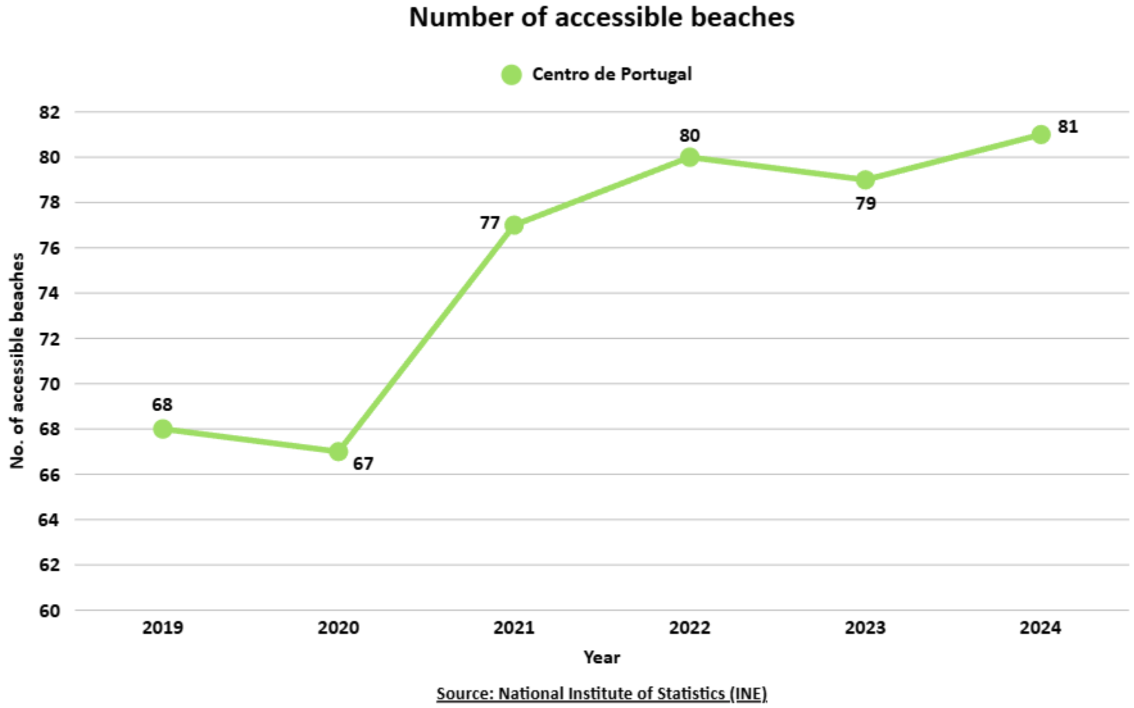


Chart 51 - Number of accessible beaches in Centro de Portugal (NUTS II), 2019–2024

After a slight reduction in 2020, consistent growth is observed until 2022, with a small fluctuation in 2023 and a further increase in 2024.

This indicator demonstrates a continuous effort to adapt bathing areas, contributing to the democratisation of access to the coast and inland areas suitable for bathing.

Accessibility - Conclusion

The overall picture shows gradual progress in the accessibility of the destination:

- Continuous growth in the number of adapted rooms;
- Relative stability in the proportion of accessible rooms;
- Increase in the number of accessible beaches in 2024.

However, the percentage of accessible rooms remains close to 3%, which indicates considerable scope for structural reinforcement of inclusion in the tourism offer. The consolidation of accessibility depends not only on quantitative increases, but also on the systematic integration of universal design criteria into tourism planning, infrastructure refurbishment and the certification of developments. In a context of demographic ageing and greater appreciation of inclusive tourism, accessibility is not only a social obligation but also a strategic opportunity for diversification and qualification of demand.

Turismo Centro de Portugal was an active participant in programs like BRENDAIT and TUR4all, which aimed to make tourism businesses and institutions aware of the importance of this issue and to organize the regional offer, after experts evaluation, which can be checked in the following link:

https://www.tur4all.com/destinations/centro-de-portugal

Local Satisfaction

The satisfaction of the resident community is a central dimension of sustainable tourism monitoring, as it reflects the degree of social acceptance of tourism and the perception of its impacts on the daily lives of local populations. Within the INSTO approach, the assessment of local satisfaction allows us to understand whether tourism development is perceived as balanced, beneficial and compatible with the quality of life in the territories of residence.

The data available for the Centro de Portugal region shows an overall positive perception of tourism by the resident population, although with variations between specific dimensions and a slight downward trend in some indicators between 2022 and 2024.

In 2024, the overall level of satisfaction with tourism in the region stands at 3,20, with 72,8% of respondents expressing a positive assessment, slightly lower than in 2022 (3,27 and 76,2%).

This evolution suggests that, although the overall perception remains favourable, there is a gradual decline in satisfaction levels. This may reflect increasing pressure associated with tourism activity, as well as higher expectations from the resident population regarding its impacts and management, but might also be a consequence of the size of the sample regarding the number of respondents (418 in 2024, while in 2022 there were 937 respondents). Slight changes in the model of survey also might have been relevant to the results: in 2022, the final number was an average of four answers, regarding the satisfaction level per season, while in 2024 there was one direct overall question.

Analysis of the impacts of tourism on quality of life reveals a moderately positive perception, with the indicator standing at 3,47 in 2024, compared to 3,67 in 2022. Although the assessment remains above the middle threshold of the scale, this reduction indicates that residents recognise the benefits associated with tourism, but also perceive less positive effects on the balance between tourist activity and daily well-being.

In the area of cultural heritage, the perception of the impacts of tourism remains high, with a value of 3,84 in 2024, despite a slight decrease compared to 2022 (3,98). This result confirms that tourism continues to be widely recognised as a factor in enhancing and promoting regional cultural heritage, reinforcing the historical and symbolic identity of the territory.

Similarly, the impacts of tourism on regional identity and local culture are rated positively in 2024, with scores of 3,65 and 3,73, respectively. These indicators show that tourism is perceived as an element that contributes to the cultural affirmation of Centro de Portugal, albeit with some loss of intensity compared to 2022, which may reflect growing concerns about processes of massification or cultural homogenisation in certain territorial contexts.

With regard to natural heritage and environmental preservation, assessments are at more moderate levels. In 2024, the impacts of tourism on natural heritage are assessed at 3,47, while the impacts on environmental preservation register a value of 3,21, both slightly lower than those observed in 2022. These results suggest a more cautious perception on the part of residents regarding tourism's ability to reconcile growth in activity with environmental protection, especially in a context of increased tourist intensity.

The economic dimension continues to be the one where tourism is perceived most positively by the resident community. In 2024, the impacts of tourism on the economy of the region of residence had a value of 4,10, despite a slight reduction compared to 2022 (4,33). This indicator confirms that the economic benefits of tourism, particularly in terms of income, employment and economic dynamism, remain clearly recognised by the local population.

Finally, the annual tourism intensity recorded in the Centro de Portugal has increased consistently over the period analysed, from 3,14 in 2022 to 3,59 in 2024. This growth in tourism intensity helps to contextualise the evolution of the perceptions recorded, suggesting that the slight reduction in some satisfaction indicators may be associated with a gradual increase in tourist presence and pressure on the territories of residence.

It’s also worth mentioning that the lowest satisfaction level of the population was recorded in Oeste, the sub region with more municipalities (Óbidos, Nazaré and Peniche) in the top 5 regarding tourist intensity in the Centro de Portugal which is coincident with the only five municipalities that are above Portuguese figure for Tourism Intensity (7,48).

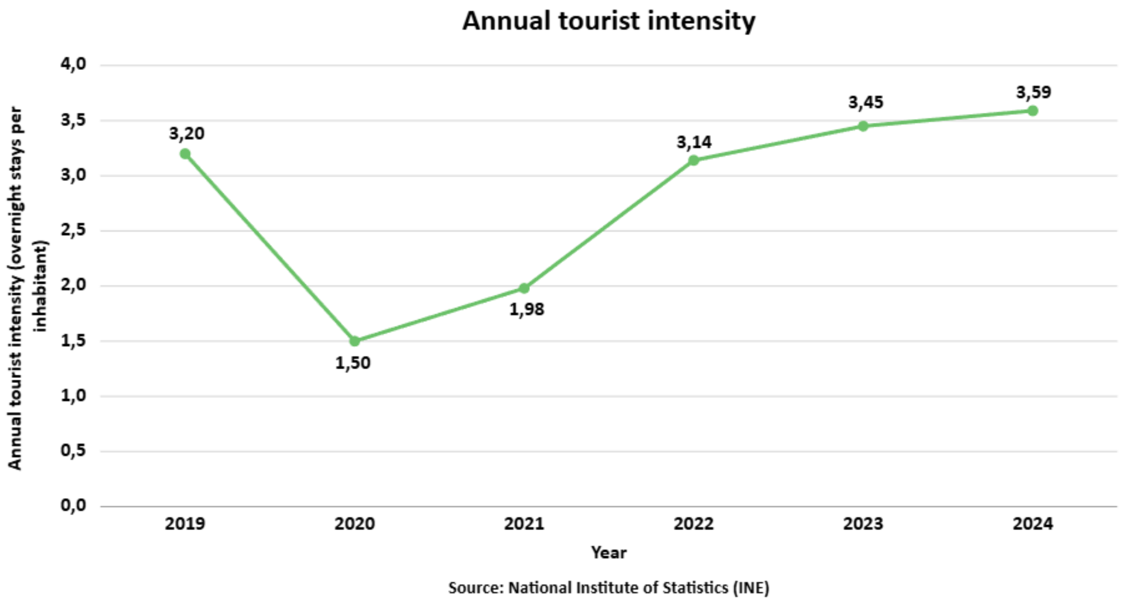


Chart 52 - Annual tourist intensity (overnight stays per inhabitant) in Centro de Portugal (NUTS II), 2019–2024

Local Satisfaction - Conclusion

Overall, the results of local satisfaction indicate that tourism in Centro de Portugal continues to benefit from a solid base of social acceptance, anchored mainly in its economic and cultural impacts. However, recent developments in perceptions point to the need for increased attention to the effects of tourism on quality of life and the environment, reinforcing the importance of management strategies that explicitly integrate the perspective of residents as tourism activity intensifies.

Regarding specifically to the survey developed, it's important to guarantee stability in further years, as the first three editions of this study were developed under a completely different scope (in the 2023 edition, which led to being impossible to compare with the other editions) or to slight changes in the formulated questions (2022 and 2024). Further joint efforts within Destination Watch, the Portuguese network of Observatories might be important to standardize procedures.

Governance

Tourism governance is a central element of destination sustainability, reflecting the ability of public and private entities to guide tourism development in a strategic, balanced and resilient manner. In the context of Centro de Portugal, governance is particularly relevant given the high territorial diversity, the coexistence of sub-regions with different levels of tourism maturity and the need to articulate economic growth, territorial cohesion and the well-being of local communities.

One of the relevant indicators for analysing destination governance is the degree of dependence of tourism demand on a small number of source markets. Between 2019 and 2024, there was a marked evolution characterised by strong instability during the pandemic period and a gradual recovery in subsequent years. In 2019, dependence on the three main source markets stood at 20,51%, falling sharply to 11,57% in 2020 and 12,97% in 2021. From 2022 onwards, there is a consistent recovery, with figures of 17,31% in 2022, 17,83% in 2023 and 17,08% in 2024. Despite the recovery, the level of dependence remains lower than in the pre-pandemic period, suggesting a slight diversification of source markets, although risks associated with the concentration of demand persist.

Throughout the period analysed, the structure of the main source markets remains relatively stable. Spain and France consistently occupy the first and second positions, respectively, across all years between 2019 and 2024, confirming their structural importance for the destination. The third position shows greater variability, being occupied by Brazil in 2019, 2020 and 2022, Germany in 2021, and the United States in 2023 and 2024. This evolution reflects some diversification in long-haul markets, also caused by national and regional specific campaigns in those markets, although the overall dependence continues to be strongly anchored in geographically closer European markets.

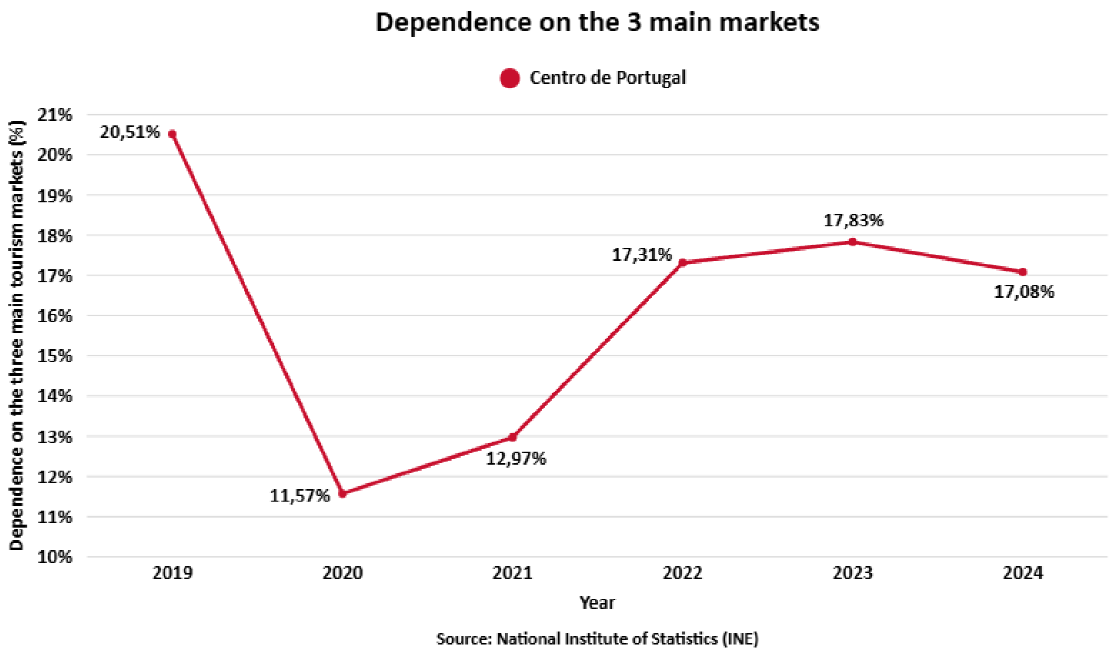


Chart 53 - Dependence on the three main tourism markets in Centro de Portugal (NUTS II), 2019–2024

The territorial governance of tourism can also be analysed through the destination's ability to distribute economic benefits and tourist activity beyond the main urban and coastal centres. In this area, the evolution of the proportion of tourism revenues generated in low-density territories reveals relevant trends. In 2019, around

25,25% of total tourism revenues were generated in these territories, a figure that increased significantly in 2020 (34,32%) and 2021 (32,21%), reflecting the exceptional effects of the pandemic and the demand for less dense destinations. From 2022 onwards, a gradual reduction in this proportion is observed, standing at 26,80% in 2022, 25,55% in 2023 and 26,37% in 2024. This evolution suggests a progressive normalisation of the distribution of economic activity, while maintaining, however, a significant weight of low-density territories in the destination as a whole.

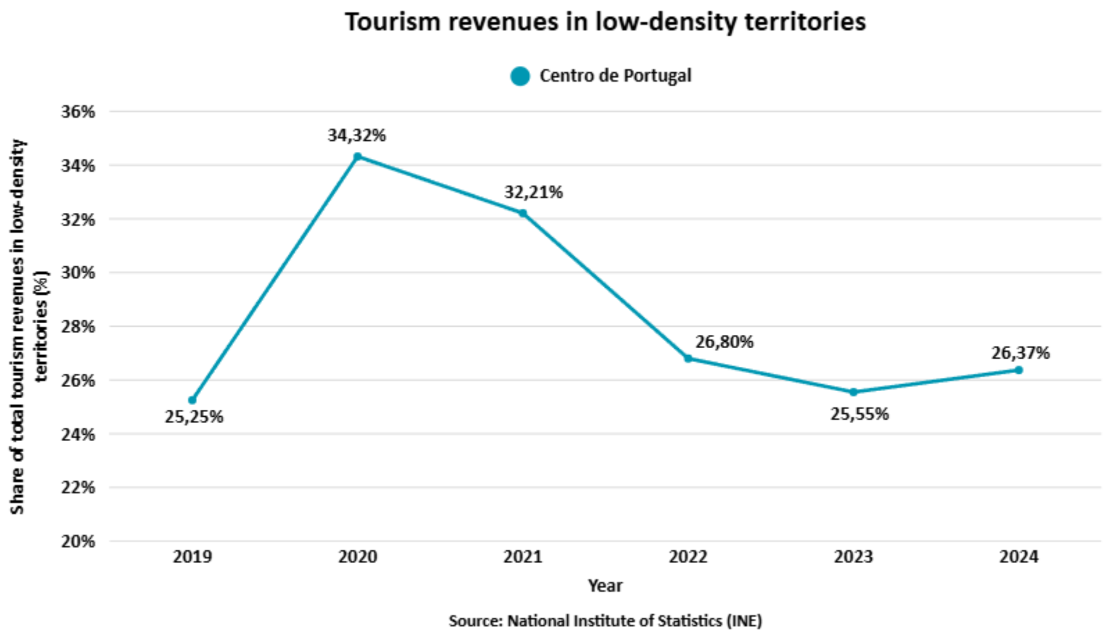
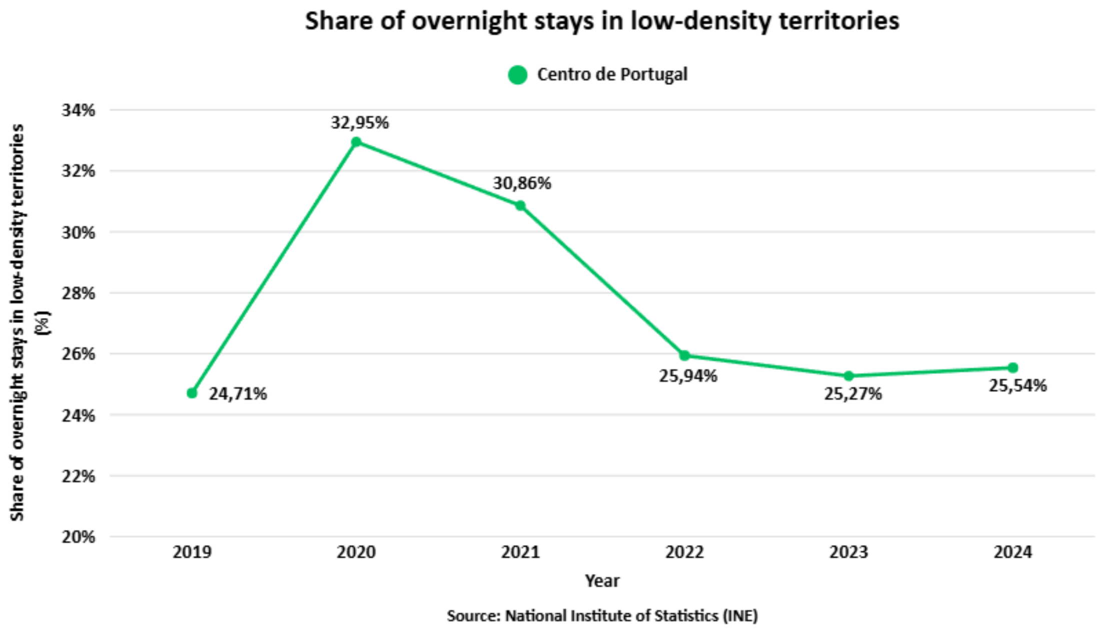


Chart 54 - Share of tourism revenues in low-density territories in Centro de Portugal (NUTS II), 2019–2024

A similar trend is observed in the distribution of overnight stays. The percentage of overnight stays in low-density territories increased from 24,71% in 2019 to 32,95% in 2020 and 30,86% in 2021, subsequently decreasing to 25,94% in 2022, 25,27% in 2023 and 25,54% in 2024, still above the 2019 figure and increasing comparing to the previous year. These figures indicate that, despite the gradual return of demand to traditionally more consolidated territories, low-density areas continue to have a significant structural weight in regional tourism activity.

In addition to territorial distribution and market diversification, destination governance can also be assessed by its ability to generate economic value and not just volume of demand. In this area, analysis of the difference between growth in overnight stays and growth in total tourist accommodation revenue reveals relevant structural trends.

Between 2019 and 2024, the comparison between the growth of overnight stays and total tourist accommodation revenue shows a clear structural shift, particularly after the pandemic period.



In 2019, growth in overnight stays (6,80%) slightly exceeded revenue growth (5,27%), reflecting a dynamic more associated with volume than value.

In 2020, both indicators registered a sharp decline due to the pandemic (-52,88% in overnight stays and -53,80% in revenue).

From 2021 onwards, a consistent pattern emerges in which revenue growth outpaces the growth in overnight stays. In 2021, overnight stays increased by 32,43%, while revenue grew by 37,41%. In 2022, this difference became even more pronounced (59,86% vs. 72,03%).

In 2023 and 2024, this trend continues, with revenue maintaining higher growth rates than demand (19,70% vs. 11,59% in 2023; 10,90% vs. 5,35% in 2024).

This dynamic suggests a trajectory of economic appreciation of the destination, reflecting improved positioning, increased average prices and greater revenue generation capacity per visitor. From a governance perspective, this indicator reveals a progressive orientation towards value creation and the improvement of the offer, reducing exclusive dependence on volume growth.

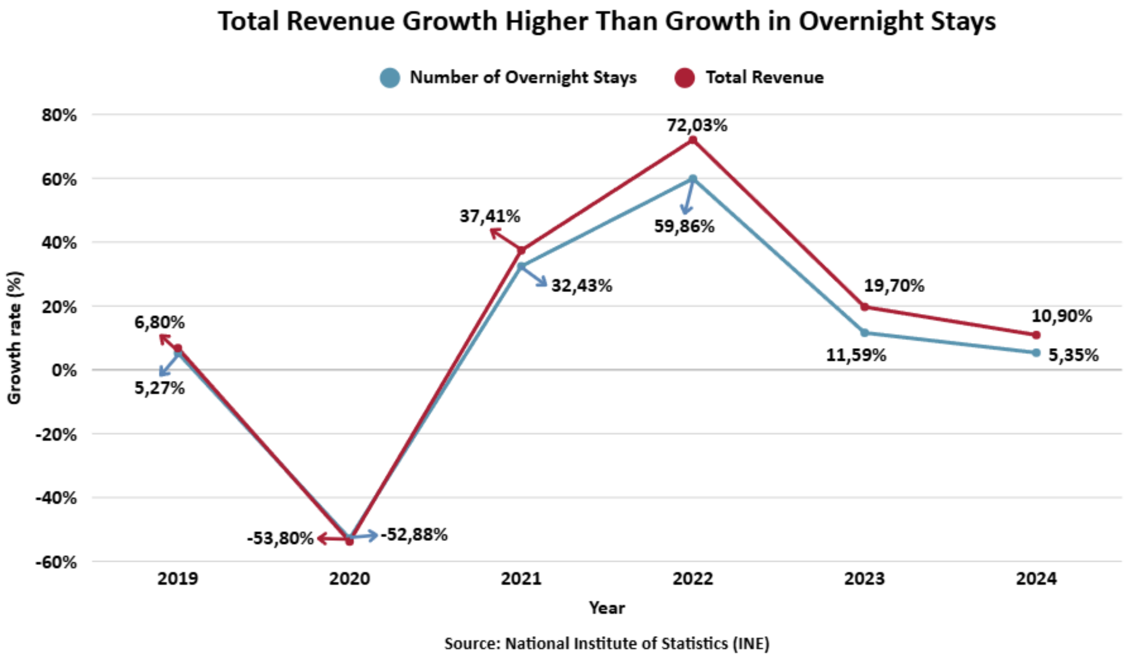


Chart 56 - Growth rates of total revenue and overnight stays in Centro de Portugal (NUTS II), 2019–2024

Recent developments suggest that the effects of greater territorial dispersion observed during the pandemic period have not fully consolidated as a structural trend, gradually returning to more traditional patterns of concentration. In this context, tourism governance in Centro de Portugal faces the challenge of transforming short-term gains into lasting strategies, reinforcing the diversification of source markets and the continued enhancement of less densely populated areas, not only as a response to external shocks, but as a long-term strategic option for the sustainability and cohesion of the destination.

Governance - Conclusion

Indicators monitored within this issue area focus on two of the national strategy for tourism development - ET2027 - goals: spread tourism fluxes to all territories; and promote higher growth of income compared to the growth of overnight stays. These goals must also be monitored at regional level, in order to assess the contribution of the region to the overall performance of tourism in Portugal, although the first one isn't such a big concern regionally, compared with what happens in regions that have dominant destinations such as Lisbon and Oporto.

The results achieved in Centro de Portugal in the last five years show that the destination is contributing decisively to the goals set, although the results obtained in the distribution of the fluxes throughout the territory could be more expressive. This is even more relevant when national efforts are being crystalized in specific funding schemes to develop low density territories. The increase in the share of low density territories, both in overnight stays and tourism revenues, which occurred in 2024 is a sign of success that, however, demands further monitoring in the following years, as it has been a recent policy applied to tourism development in Portugal.

Apart from the national goals, there is a governance challenge in the destination that has also been a recent concern among regional stakeholders, considering the existing administrative structure and the proliferation of legal responsibilities awarded to different stakeholders. Regarding the regional tourism development, Turismo Centro de Portugal shares competences with Inter-municipal communities, municipalities, PROVERE strategies (territorial or product destination structures) and CCDRC (regional institution responsible for this territories' development in multiple fields), which demands the creation of a strategy to articulate actions regarding promoting the destination.

As a complement to all efforts of articulating strategies and actions with all relevant stakeholders, Turismo Centro de Portugal organized the first meeting of all parties in October 2024, in Sertã, from which resulted the creation of work groups, including one dedicated to monitoring the destination, in which the Observatory takes on a leading role.

Finally, the connection between the monitoring strategy and the needs and expectations of stakeholders is crucial for the Observatory's success. After the 2023 edition of the annual report, over 120 regional institutions, public and private, were asked to read, analyse, correct and validate the data collected and presented, which resulted in multiple suggestions for further indicators to be monitored (around 15 were already integrated in this edition of the report).

Culture and Heritage

Culture and heritage are key elements of the tourism model in Centro de Portugal, contributing to the differentiation of the destination, the strengthening of its identity and the diversification of the experience offered to visitors. With four sites that are part of UNESCO's World Heritage List and six cities listed in the Creative Cities Network, also from UNESCO, it was considered that this should be an issue area with specific indicators to be monitored. Recent developments show not only post-pandemic recovery, but also consolidation and sustained growth in cultural activity.

The regional cultural infrastructure has been progressively strengthened in recent years. The percentage of municipalities with museums stood at 65% in 2021, remained at 64% in 2022 and 2023, and increased to 69% in 2024. This data reinforces the idea of greater territorial capillarity of cultural offerings, reducing asymmetries in access and strengthening the local dimension of cultural activity.

The dynamics of the performing arts are another significant indicator of regional cultural vitality. The number of live shows rose from 5.852 in 2021 to 10.905 in 2024, reflecting a rapid recovery from pandemic limitations and expansion of cultural offerings. This growth was accompanied by a very significant increase in audience numbers.

The number of spectators rose from 688.342 in 2021 to 3.294.318 in 2022, 4.464.305 in 2023 and 4.754.428 in 2024.

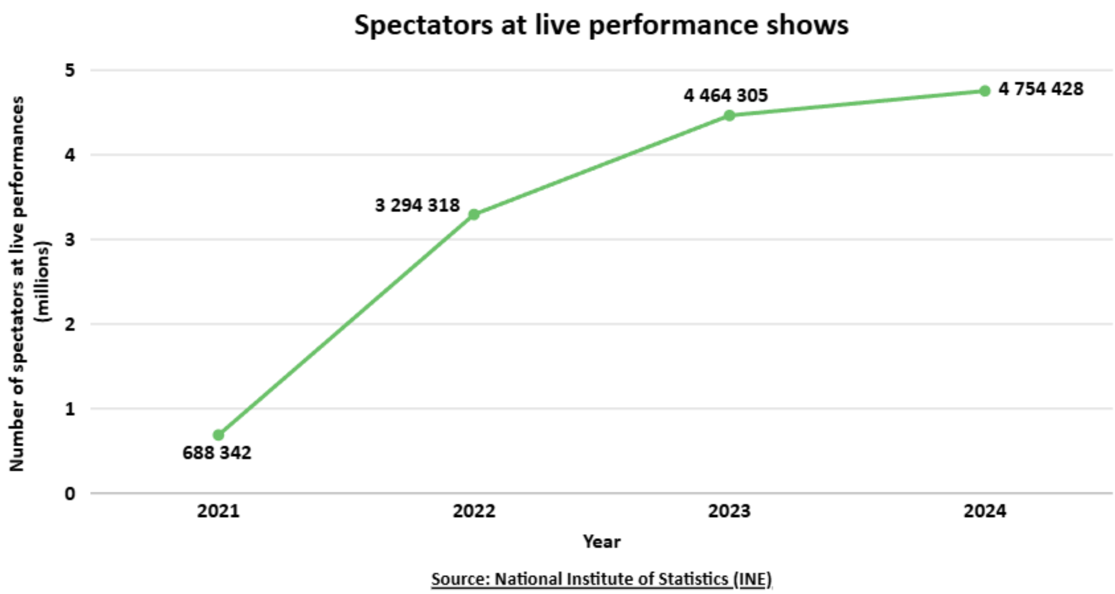


Chart 57 - Number of spectators at live performance shows in Centro de Portugal (NUTS II), 2021–2024

This trajectory reveals not only a recovery, but also a structural strengthening of cultural participation, with a direct impact on the local economy, urban revitalisation and tourist attractiveness.

In the museum sector, the evolution of demand confirms this trend towards consolidation. The total number of visitors increased from 1.108.014 in 2021 to 2.854.609 in 2024 - more than doubling in three years.

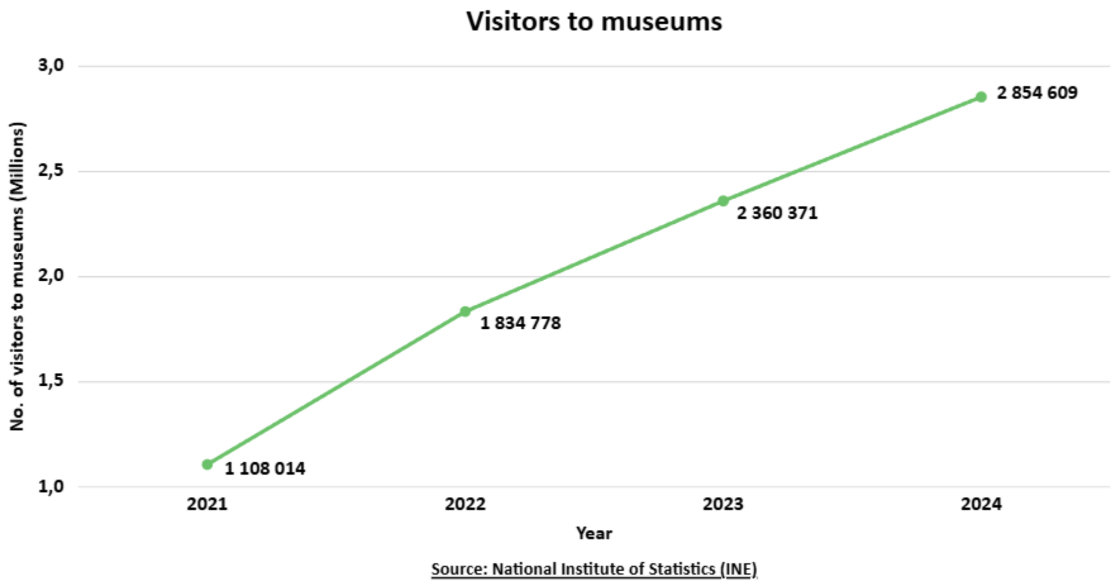


Chart 58 - Number of visitors to museums in Centro de Portugal (NUTS II), 2021–2024

The international component also recorded significant growth. The number of foreign visitors rose from 142.388 in 2021 to 656.079 in 2024. In relative terms, the percentage of foreign visitors rose from 12,85% in 2021 to 21,73% in 2022 and 23,67% in 2023, settling at 22,98% in 2024. Despite a slight reduction compared to the previous year, the weight of international demand remains clearly above the initial level of the series, showing greater internationalisation of the regional cultural offer.

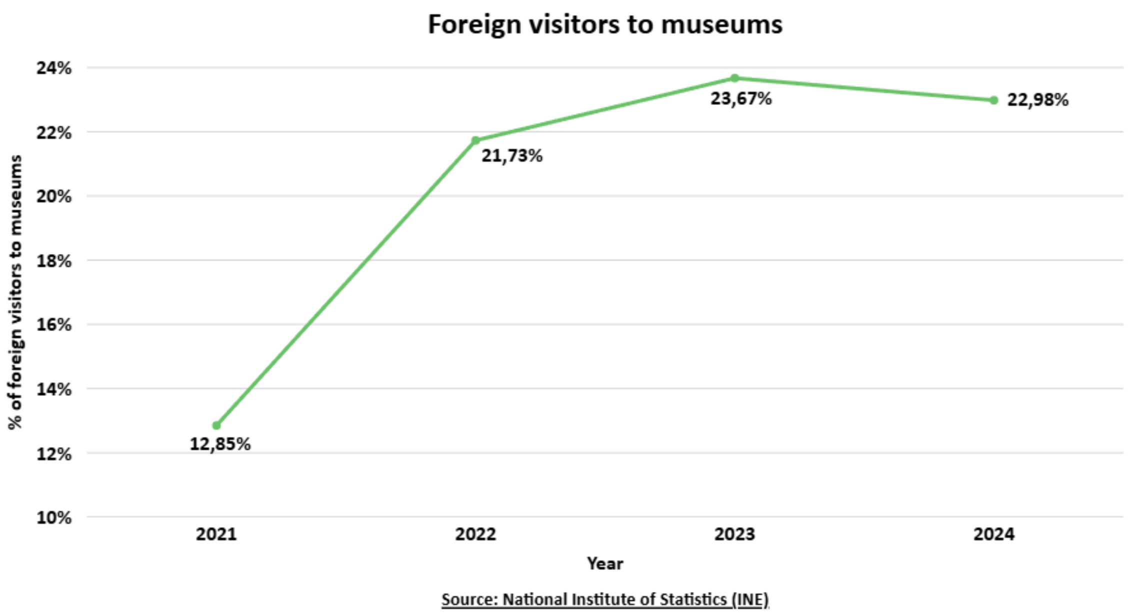


Chart 59 - Share of foreign visitors to museums in Centro de Portugal (NUTS II), 2021–2024

In addition to the growth in cultural participation and demand, expenditure on cultural and creative activities also shows a strong upward trend, reinforcing the economic relevance of the sector within the regional tourism model. Total spending increased from 125,99 million euros in 2019 to 192,55 million euros in 2024, following a temporary decline in 2020 (111,65 million euros) and a consistent recovery thereafter. This evolution reflects not only the post-pandemic rebound, but also a structural strengthening of cultural consumption.

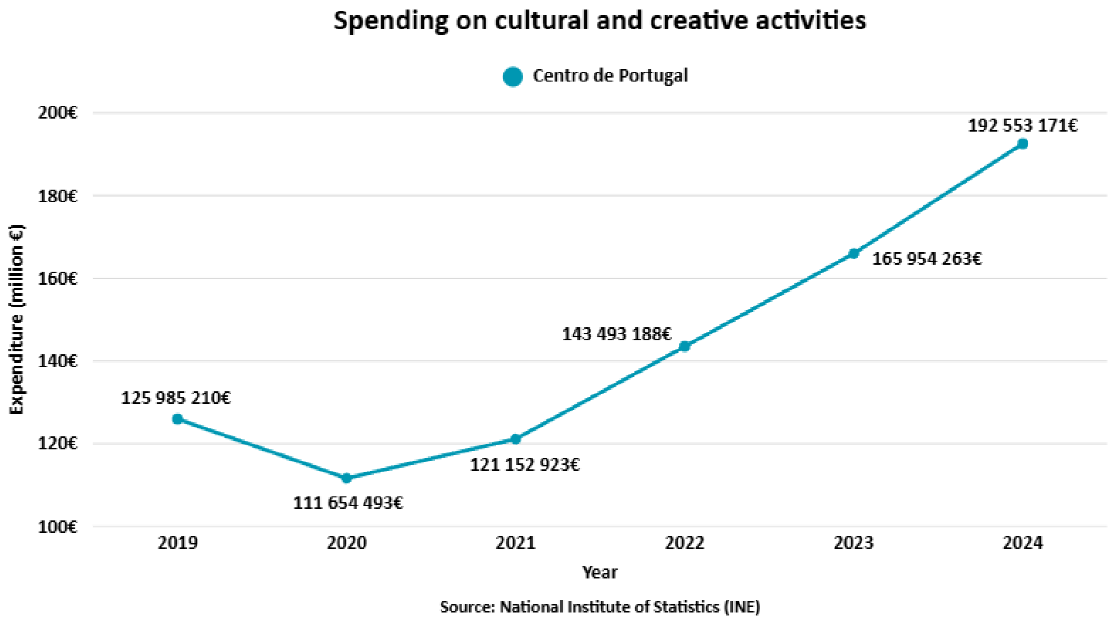


Chart 60 - Expenditure on cultural and creative activities in Centro de Portugal (NUTS II), 2019–2024

A similar pattern is observed in expenditure specifically associated with cultural heritage. Spending rose from 21,72 million euros in 2019 to 34,18 million euros in 2024, with a peak of 37,67 million euros in 2023, followed by a slight adjustment in the most recent year. Despite this fluctuation, the overall trend remains clearly positive, indicating sustained investment and consumption linked to heritage assets.

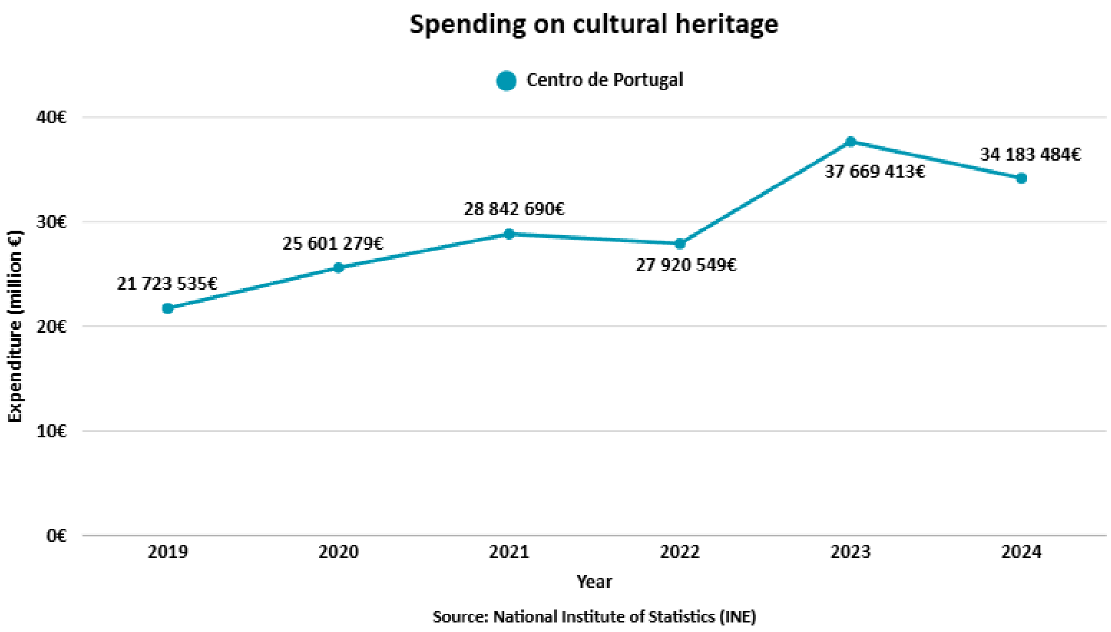


Chart 61 - Expenditure on cultural heritage in Centro de Portugal (NUTS II), 2019–2024

These trends confirm that culture and heritage are not only relevant from a social and identity perspective, but also play an increasingly important role in generating economic value, supporting local economies and enhancing the attractiveness of the destination.

Culture and Heritage - Conclusion

These trends confirm that culture and heritage are not only relevant from a social and identity perspective, but also play an increasingly important role in generating economic value, supporting local economies and enhancing the attractiveness of the destination.

Turismo Centro de Portugal embraced a project, between 2016 and 2019, along the municipalities with classified UNESCO sites, the University of Coimbra and cultural regional authorities in order to create a network between those institutions and awarded sites, which implemented a joint events calendar, local hospitality programs, and an educational program, along a common marketing plan. In 2024, the first steps to develop a similar program related to the Centro de Portugal's UNESCO Creative Cities was taken, considering the success of the first program.

Sustainable Mobility

The existence of a well-planned mobility system and the availability of more efficient infrastructure might contribute decisively to reduce the environmental footprint created by tourism fluxes, besides enhancing the experience for tourists, contributing to create a more enjoyable and sustainable way to explore the destination.

Sustainable mobility was also one of the policy issues defined by OECD during the process of structuring a set of indicators to monitor sustainable tourism in Portugal, as a part of a joint effort, designed with Turismo de Portugal and the regional observatories that occurred during 2024 and 2025, to provide a wide and comparable scheme of indicators, including nationally and regionally compiled core indicators, to be compiled by regional observatories, through a common approach.

During that process, and considering the importance of this policy issue to Centro de Portugal, this Observatory was set as responsible to propose a set of indicators about this issue area that would be presented and discussed with the other regional partners.

As a part of the regional efforts to support the national strategy for tourism, TCP was involved in a series of webinars led by ADENE and MobiE, two national bodies responsible for energy and mobility matters, which enhanced the results of annual studies regarding the performance of Portugal's tourism enterprises in these fields. The Observatory proposed a partnership with these institutions in order to participate in the process in future studies, to reach wider samples, and to collect regional data.

These studies revealed that, in Centro de Portugal, in 2024, 33% of accommodation respondents had a full fleet of electric vehicles; 36% of the respondents were equipped with electric charging stations and 44% of accommodations provided bicycles as a part of their service.

Besides collecting data that was already available regarding this matter, Centro de Portugal created a system to measure the fluxes of passages in walking and cycling routes, which are a big part of the region's promotion and investment efforts. This system was started with 5 own counters placed in strategic locations in five of the big routes in the region and then it evolved to a more broad system in which the Observatory engaged with local authorities that placed counters in their routes, in order to get access to that information and manage it according to the original system.

In 2024, 93.059 passages were monitored from 23 counters, distributed throughout the Centro de Portugal region. Considering only the 12 counters where there was no loss of information during the year, 54.892 passages were registered as depicted in the Figure below, per month.

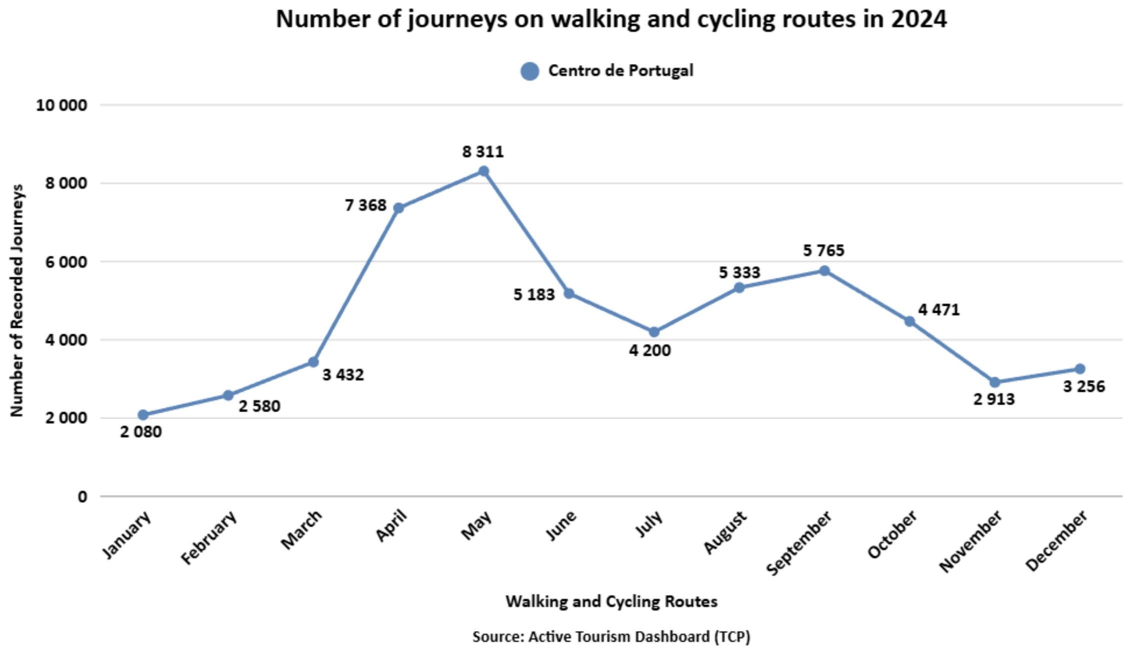


Chart 62 - Number of journeys on walking and cycling routes in Centro de Portugal (NUTS II), by month, 2024

The analysis of the monthly passages enabled monitoring of a Seasonality Index applied to the passages – 27,87% in 2024 – which shows the difference between Active Tourism and the general Seasonality Index, as well as the potential of this product to mitigate seasonality in the destination. The system also allows cross information with weather indicators, such as level of temperature or level of precipitation, creating relevant information for tourism enterprises.

Sustainable Mobility – Conclusion

As the designated responsible for the development of indicators in Portugal to the policy issue of Sustainable Mobility, Centro de Portugal Observatory developed the system to monitor active tourism and its tourists' behaviour, considering weather conditions among other common tourism indicators. Besides the relevant indicators that may be collected from the dashboard, the system shows how the best practices in joining efforts with regional stakeholders may benefit all of them and, consequently, the destination. Future developments of the system include, besides possible extensions to other regions, developing qualitative studies to cross and validate the collected data and the involvement of regional active tourism enterprises, on top of deepening the connections with current and future partners that equipped the territory with counters, to develop the project further.

Conclusions and future prospects

The analysis developed throughout this report shows that tourism in Centro de Portugal has entered a new phase of structural consolidation. After the abrupt shock of 2020 and the accelerated recovery of the following years, 2024 confirms a scenario of stabilisation at levels higher than the pre-pandemic period, both in terms of demand volume and economic value generation.

The main indicators show that recent growth no longer reflects an exceptional recovery effect but rather more structural trends. The number of guests and overnight stays reached historic highs, occupancy consolidated, RevPAR and ADR strengthened value generation capacity, and total revenues clearly exceeded 2019 levels. At the same time, culture, heritage and the performing arts have shown a robust recovery, with strong growth in public participation and a strengthening of the international component.

However, quantitative consolidation does not eliminate structural challenges. Seasonality remains marked, with strong concentration of demand in the summer period, especially in August. The territorial distribution of activity, despite maintaining a significant weight in low-density areas, shows a decline compared to the dispersion observed during the pandemic period. Dependence on certain source markets remains a structural risk factor, albeit slightly mitigated compared to the pre-pandemic period.

In the environmental field, there has been positive progress in the adoption of energy and water efficiency practices, as well as progress in the implementation of circular economy measures. Nevertheless, there is still significant scope for strengthening the transition to less resource-intensive operating models. Climate action, in turn, requires greater strategic integration, particularly in the coordination between tourism growth, energy consumption and associated emissions.

Culture is establishing itself as a vector for the destination's qualification, contributing to the diversification of the tourism experience and the internationalisation of demand. The strengthening of cultural infrastructure, the growth of performing arts and the increase in the number of foreign visitors to museums indicate significant potential for reducing dependence on beach tourism and mitigating seasonality.

Finally, the monitoring efforts must strengthen the connection with local stakeholders, regional, national and international institutions, integrating their vision and expectations in the set of issue areas and indicators to be monitored and, most importantly, their active participation in the process, as a part of a common approach to an undisputedly crucial process of measuring the progress of tourism in all domains of sustainability.

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