



ETC Monitoring Sentiment For Domestic and Intra-European Travel

Respondents that plan to travel to Portugal next

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This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the **19th wave of market research** initiated in September 2020. Responses were collected from Europeans in 10 high-volume source markets in light of the COVID-19 crisis that answered they were planning to travel to **Portugal** next.

RESEARCH HIGHLIGHTS:

- **75,9% of surveyed Europeans planning to travel in the next 6 months**, representing a 6% increase compared to a year ago. **80,1% of Europeans over the age of 55 are eager to take a trip over the next six months.**

- The main concerns for Europeans continue to be **high inflation** (20,8%) and **personal financial situations** (16,1%) follow by the **conflicts in Ukraine** (11,4%) and **in the Middle East** (10%)

- **58,3 % of Europeans intending to travel will visit another European country**, with June and July the most popular months (44,5%).

- **Europeans most desired leisure for the summer are Sun & Beach holidays (19,4%) and Nature & Outdoors trips (13,6%)**

Among the most sought-after experiences are tasting the enjoying scenic beauties (19%) local cuisine (17%), diving into the local life (15%) and admiring famous landmarks (15%).

- **The majority of Europeans prefer to fly to their next destination (53,5%),** while greener alternatives like train or bus are preferred by 14,5%.

- **57% of travellers plan to make multiple trips in the next six months** with those the travel solo (61%) or with friends (57%) the most likely to take two or more trips.

- **48% of Europeans have not yet booked their next trip**, with people over the age of 55 and city breaks enthusiasts the least decisive with 61% and 57% respectively, yet to book.

- **Safety (16%), Pleasant weather (13%) and attractive deals (11%)** are the Europeans' leading criteria for selecting a travel destination.

- **74% of Europeans adapt their travel behaviour to the climate crisis**, by avoiding extreme temperatures (17%), choosing stable weather conditions destinations (15%) and monitoring weather forecasts (15%)

- With financial worries persisting, Europeans are trying to limit costs at the destinations.



Online market research. Survey participants are consumers with at least 2 overnight trips during the last three years (2021-2023).

Distribution/ data collection period:

Wave	Survey Date	Sample
Wave 15	Mar '23 survey	6000
Wave 16	May '23 survey	6002
Wave 17	Set '23 survey	5993
Wave 18	Apr '24 survey	5859
Wave 19	Jun '24 survey	5955

The present report is about data (wave 15 to wave 19) from above respondents that selected **Portugal** in the question **'To which country(ies) do you plan to travel next?'**

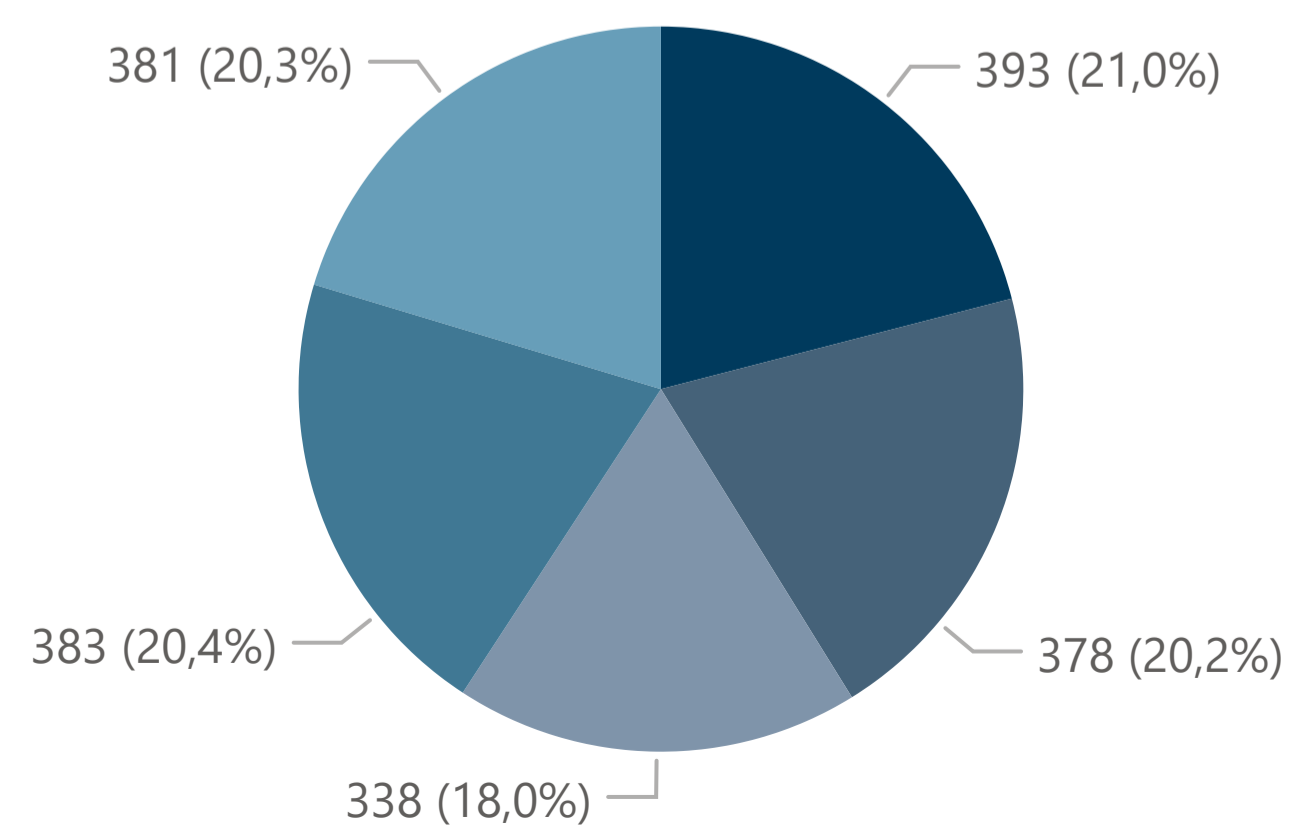
Respondents' countries (ten high-volume European source markets):

Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria

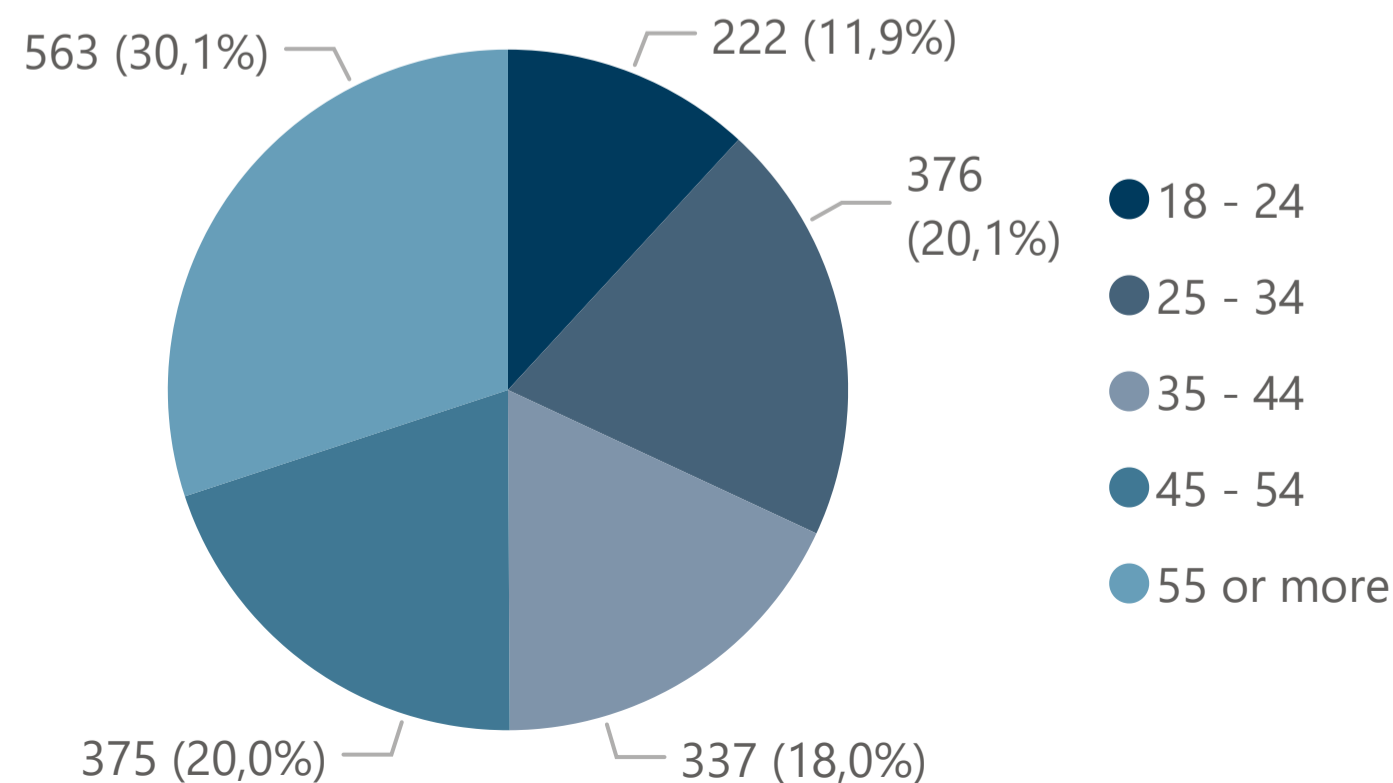
Research themes examined: Travel personas (1 question), Travel concerns and external shocks on travel (8 questions) and Travel intentions, preferences and trip planning (13 questions)



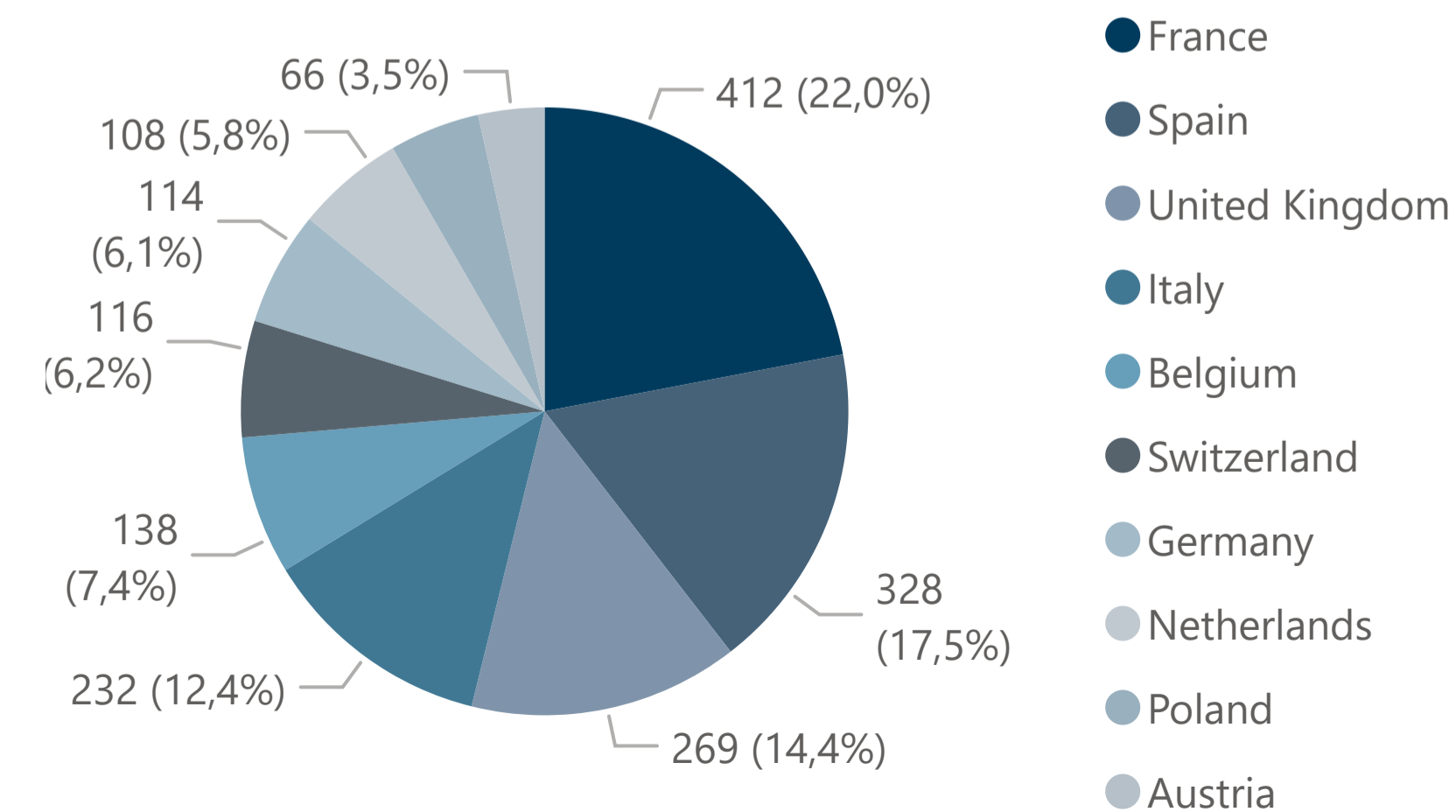
No. and % of respondents, by wave



No. and % of respondents, by age group



No. and % of respondents, by country



01

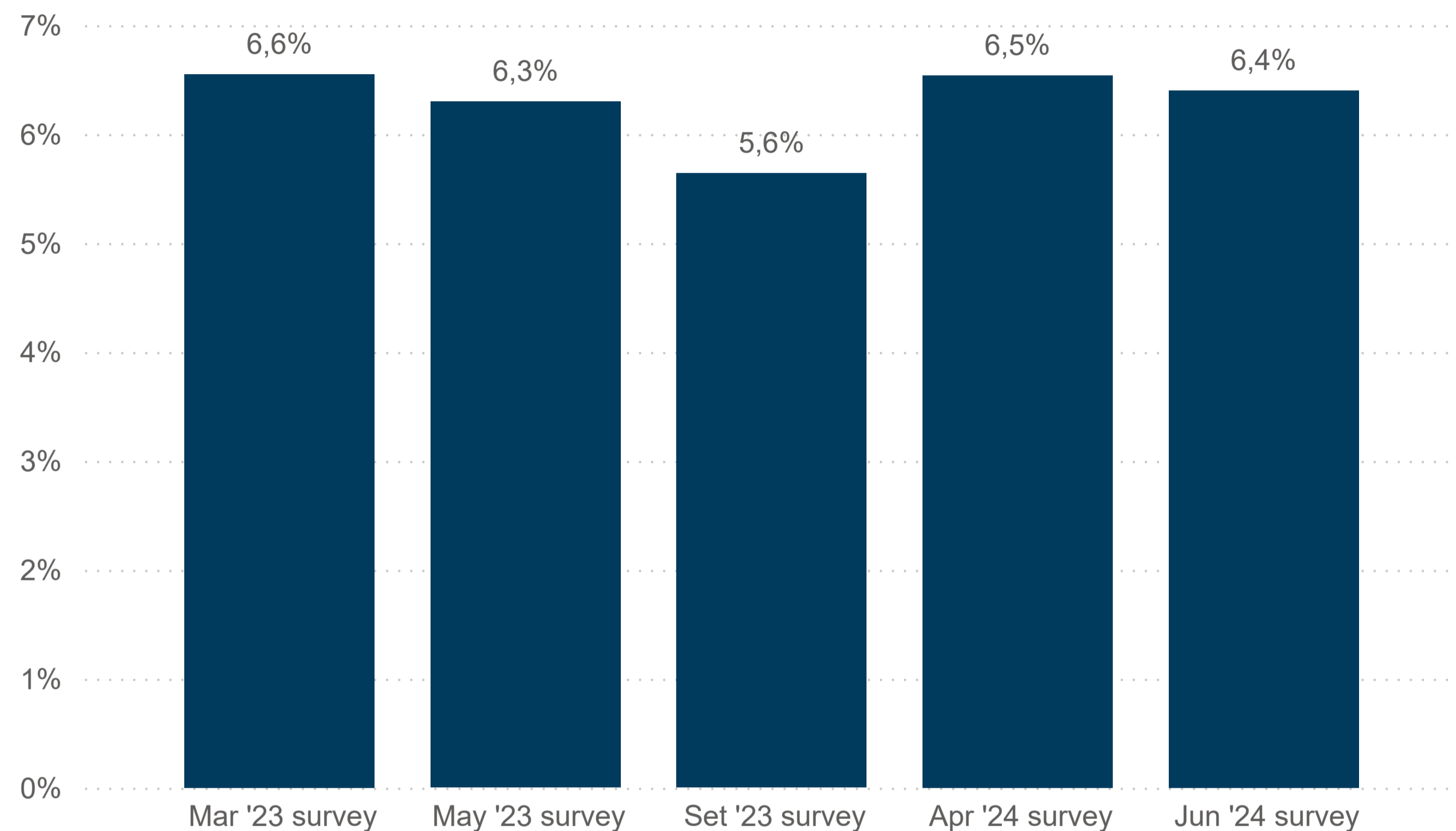
TRAVEL INTENTIONS



ETC Monitoring Sentiment For Domestic and Intra-European Travel
Respondents that plan to travel to Portugal next



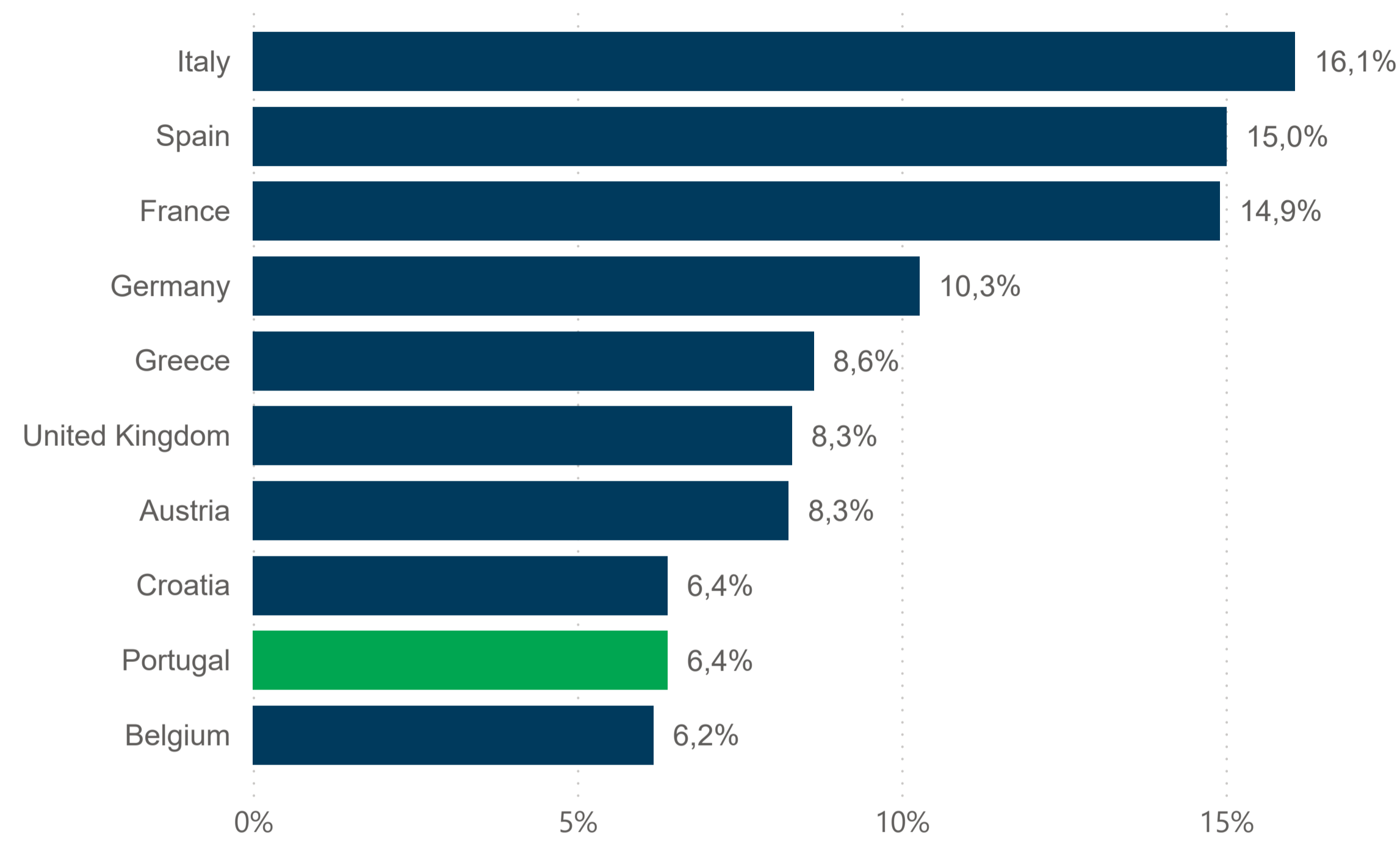
Intention to travel to Portugal next



No. of respondents:
29809

Of all the inquired Europeans, around 6,4% plan to travel to Portugal in the coming 6 months, a small decrease compared to the last wave

Top 10 of intended countries to travel to next



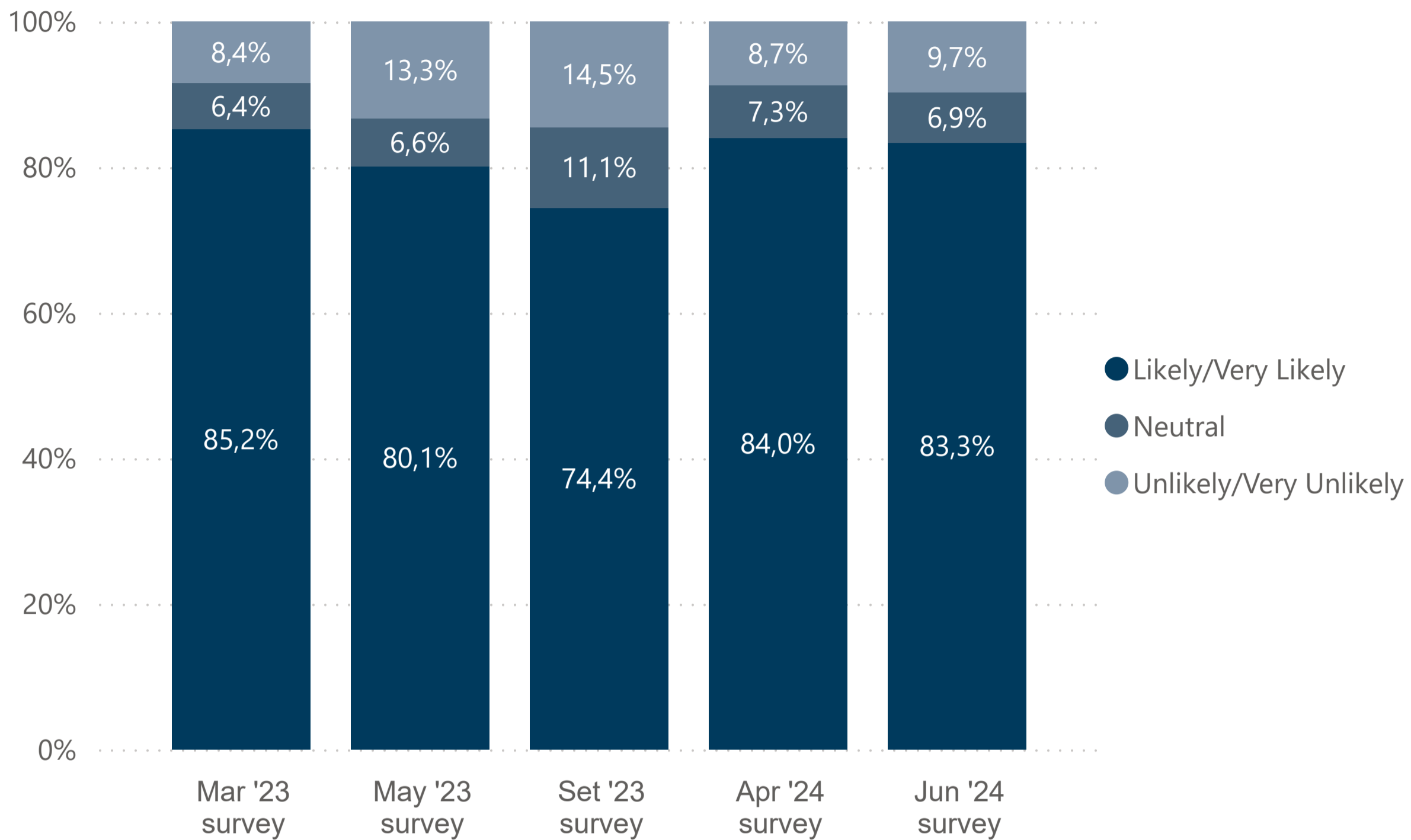
No. of respondents:
5955

In the most recent wave, Portugal stands as the 9th preferred destination for Europeans, inside Europe.

Question: To which country(ies) do you plan to travel next?



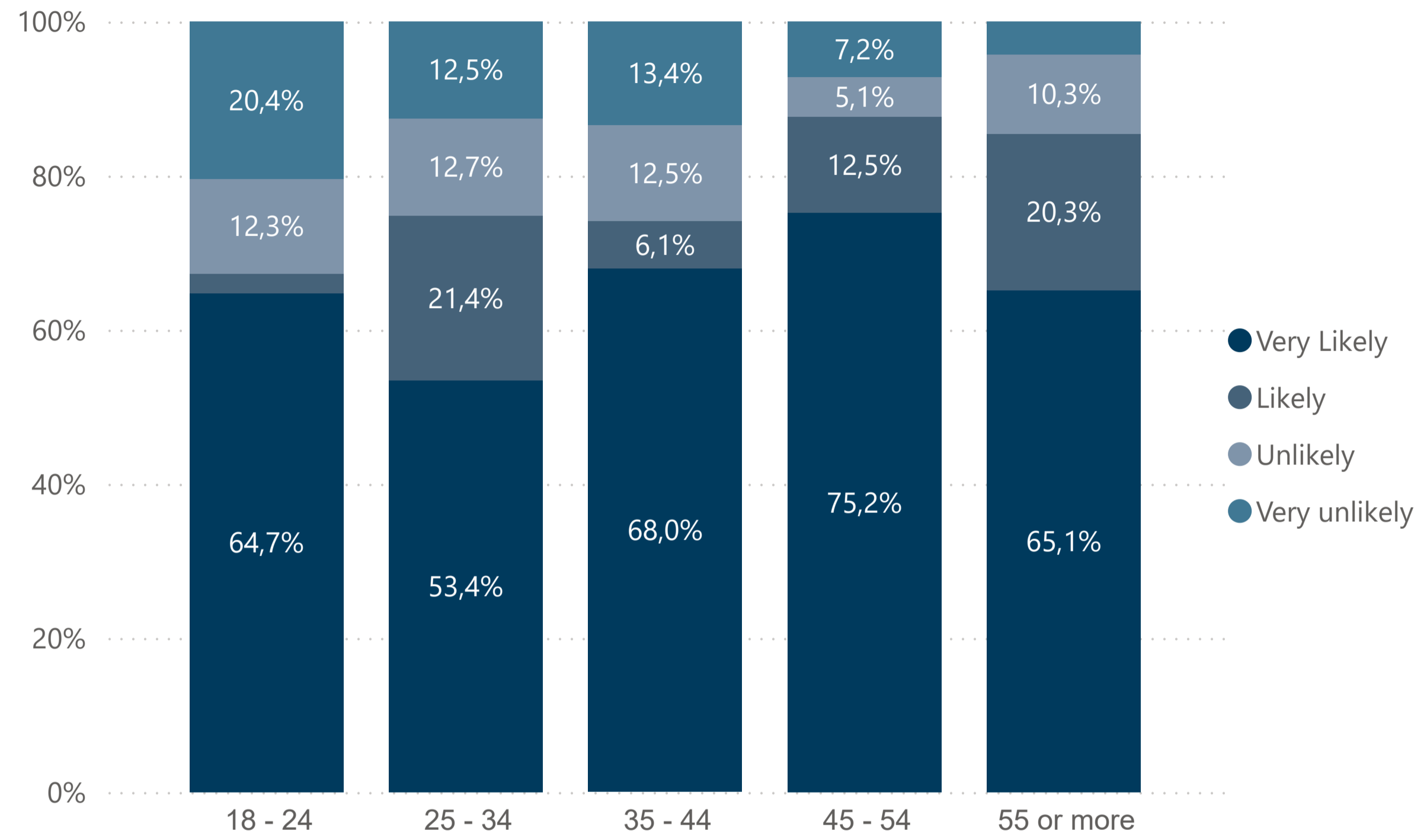
Intention to travel in the next 6 months



No. of respondents:
1873

83,3% of Europeans that plan to travel to Portugal, plan doing so in the coming 6 months, a decrease of -0.7% vs. the previous wave.

Intention to travel in the next 6 months



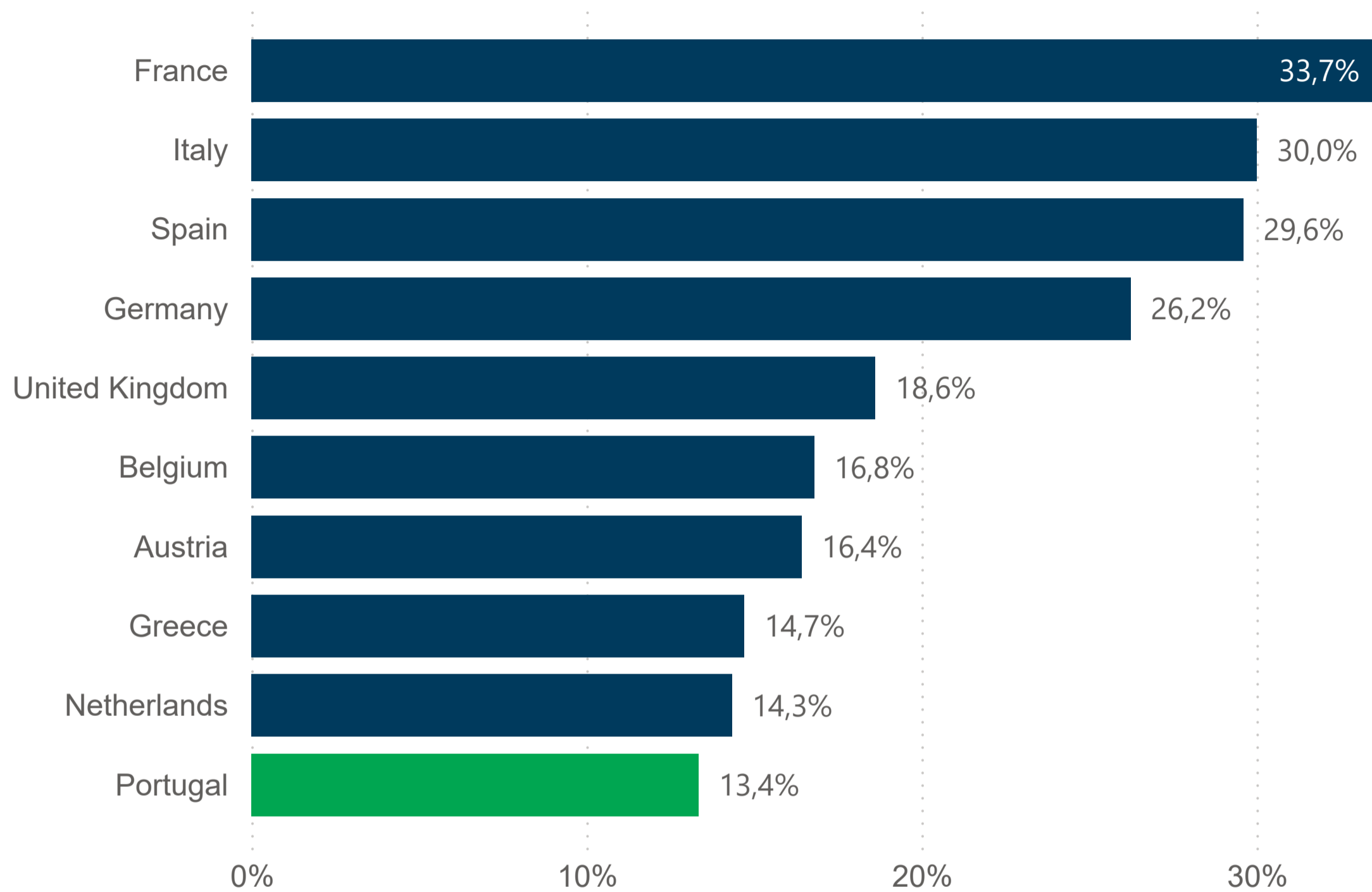
No. of respondents:
381

Intention to travel to Portugal in the next 6 months is very likely among the travellers in the age group of 45-54 than among the others, both with than 75%. On the opposite end of the scale, travellers on the age group of 18-24 are the most unlikely of traveling in the next 6 months with almost 33% of unlikely or very unlikely answers.

Question: Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?



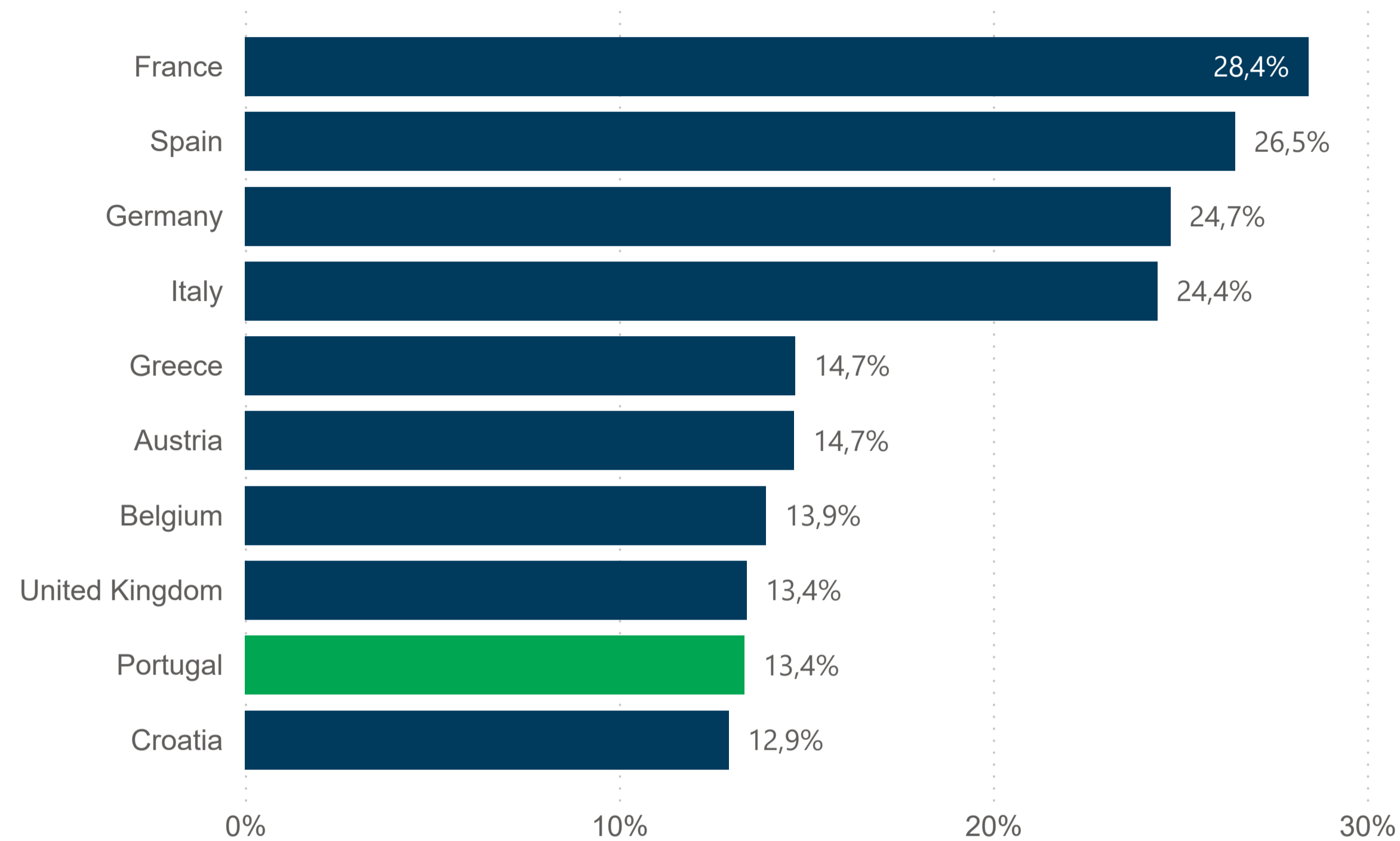
Top 10 countries visited in the past 3 years



Jun '24 survey
No. of respondents:
5955

In the past 3 years, 13,4% of European travellers have visited Portugal, making it the 10th preferred travel destination.

Top 10 countries visited in the past 3 years (only external travels)



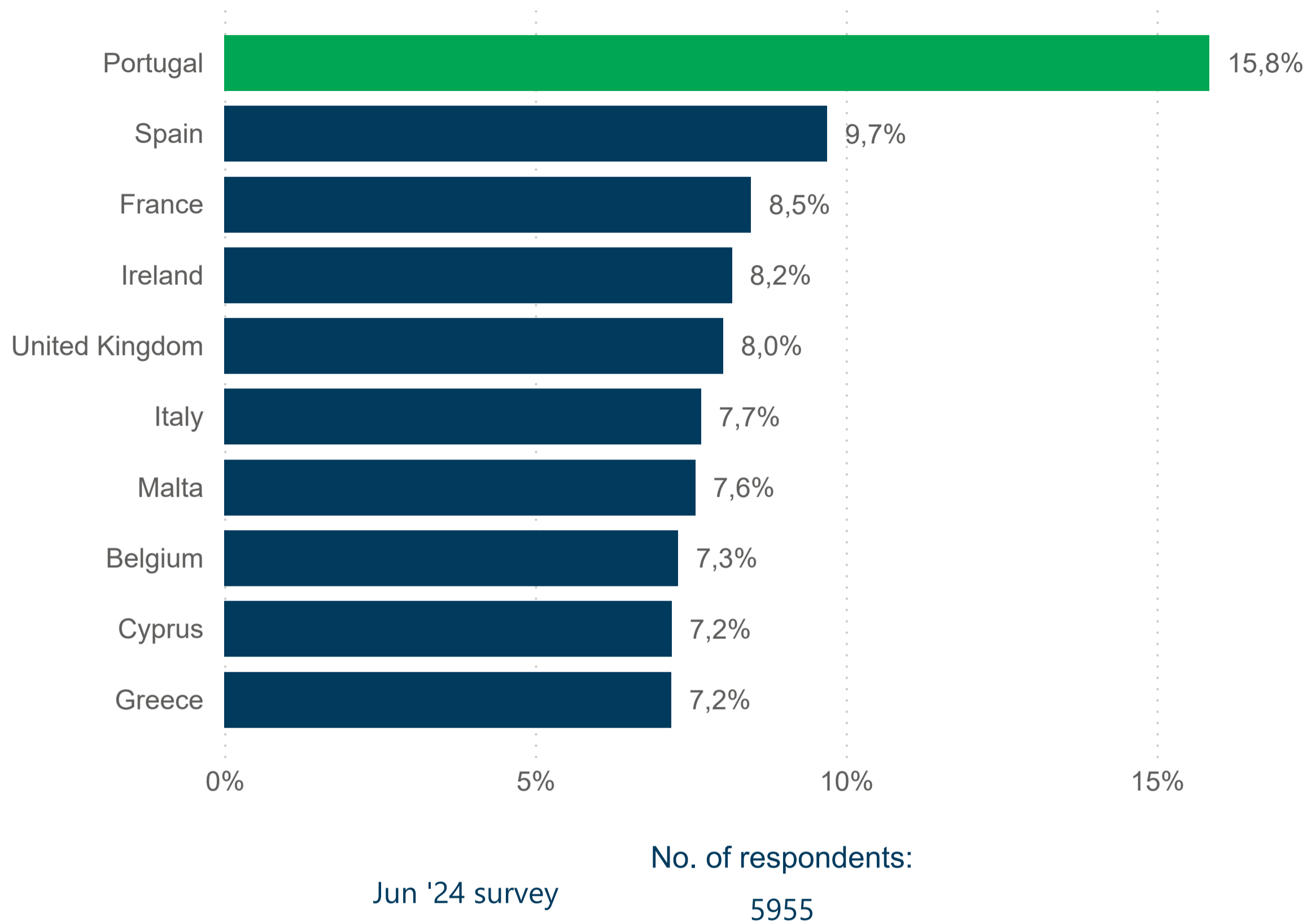
Jun '24 survey
No. of respondents:
5955

If domestic travel is removed than Portugal becomes the 9th preferred travel destination in the last 3 years.

Question: Which European countries have you visited in the past 3 years?

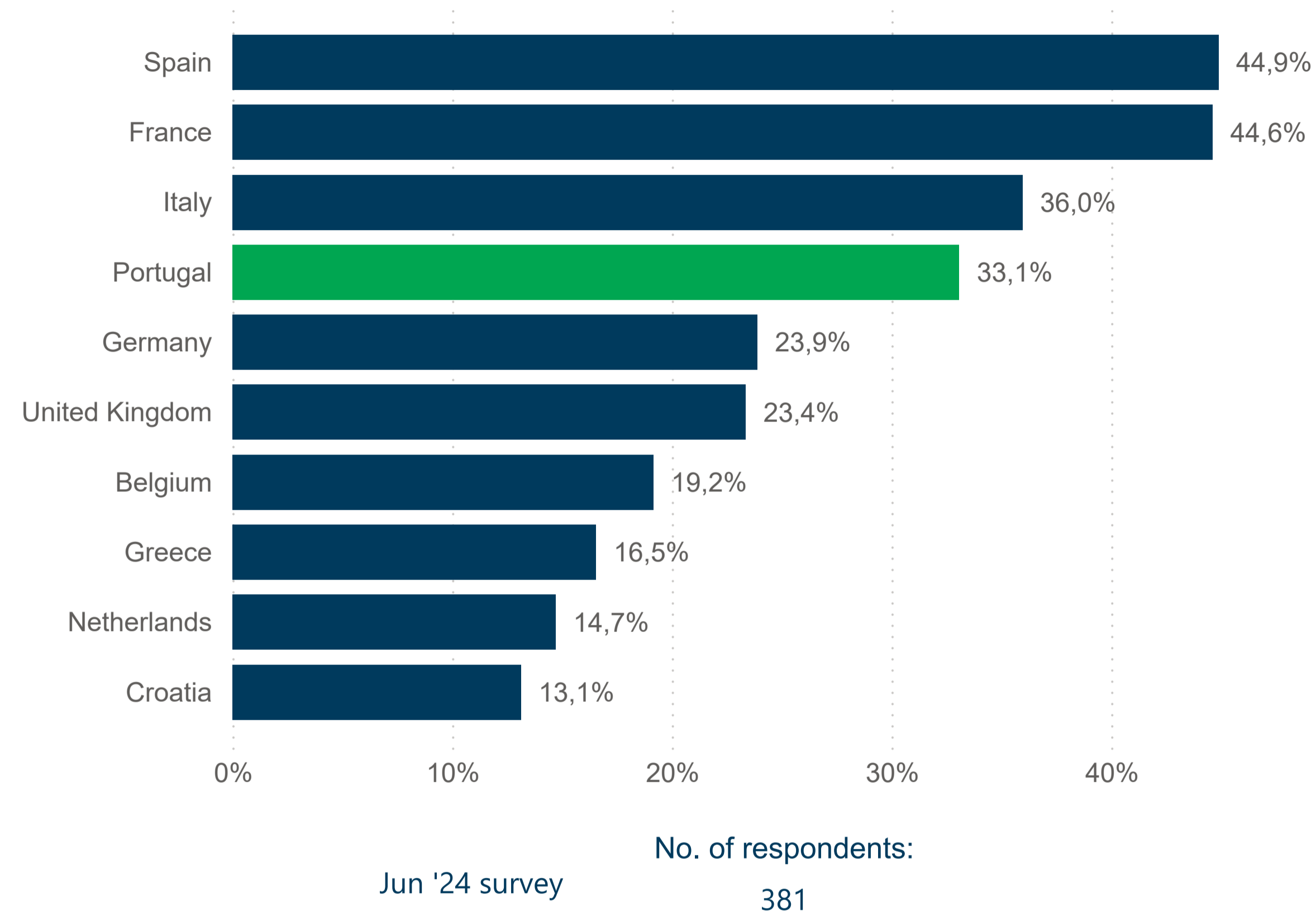


Percentage of those who visited to an european country than plan to visit Portugal



15,8% of Europeans that travelled to Portugal in the past 3 years plan to comeback in the near future. It's also noteworthy that 9,7% of Europeans that visited Spain recently plans to visit Portugal in the next 6 months.

Previous travels of those that plan to visit Portugal in the future

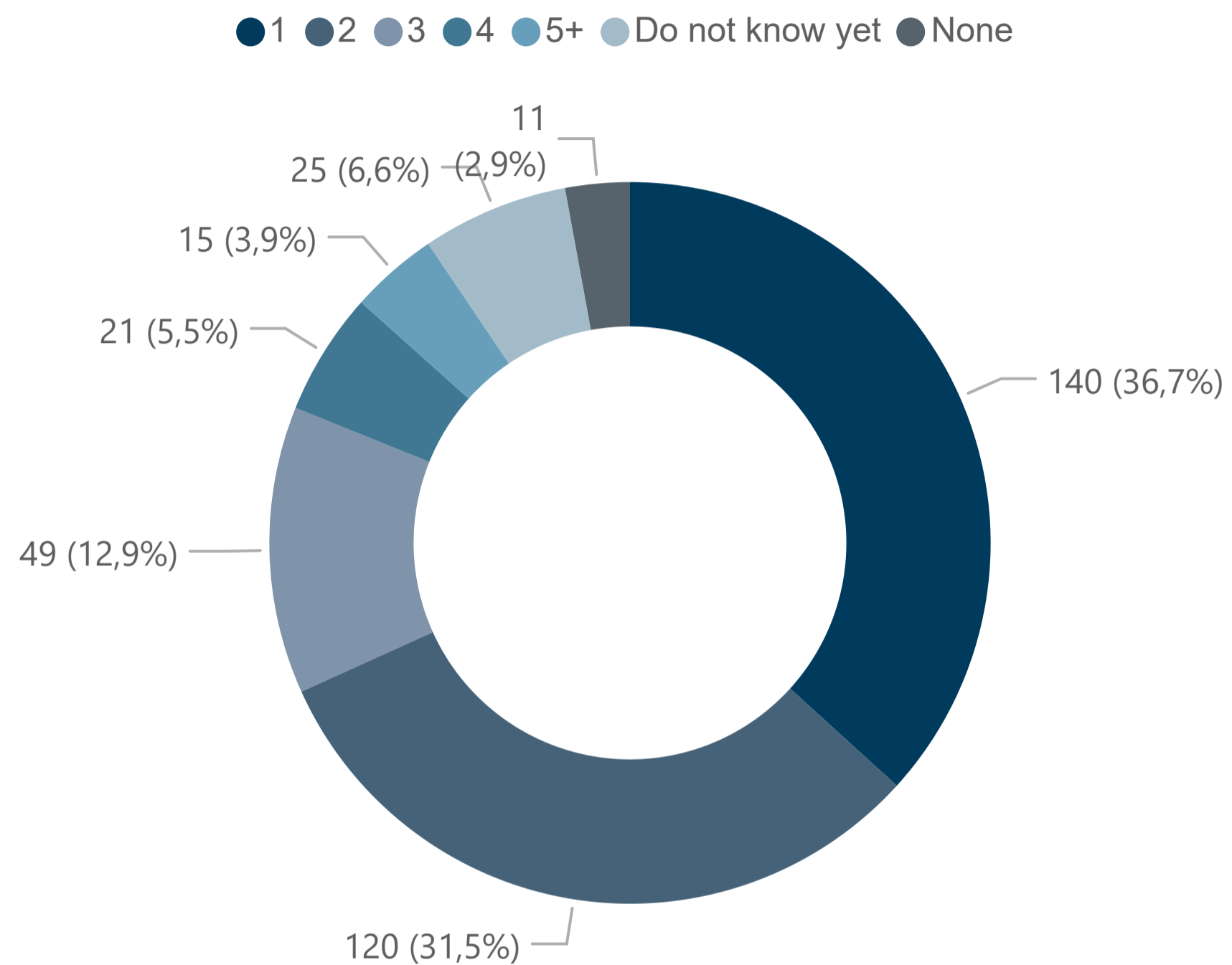


Of those that answered that planned to visit Portugal in the next 6 months, 44,9% have travelled to Spain recently. Other recent travels include France (44,6%) and Italy (36%). Also 33,1% have visited the country in the past 3 years.

Question: Which European countries have you visited in the past 3 years?



How many trips travellers plan to take in the next 6 months

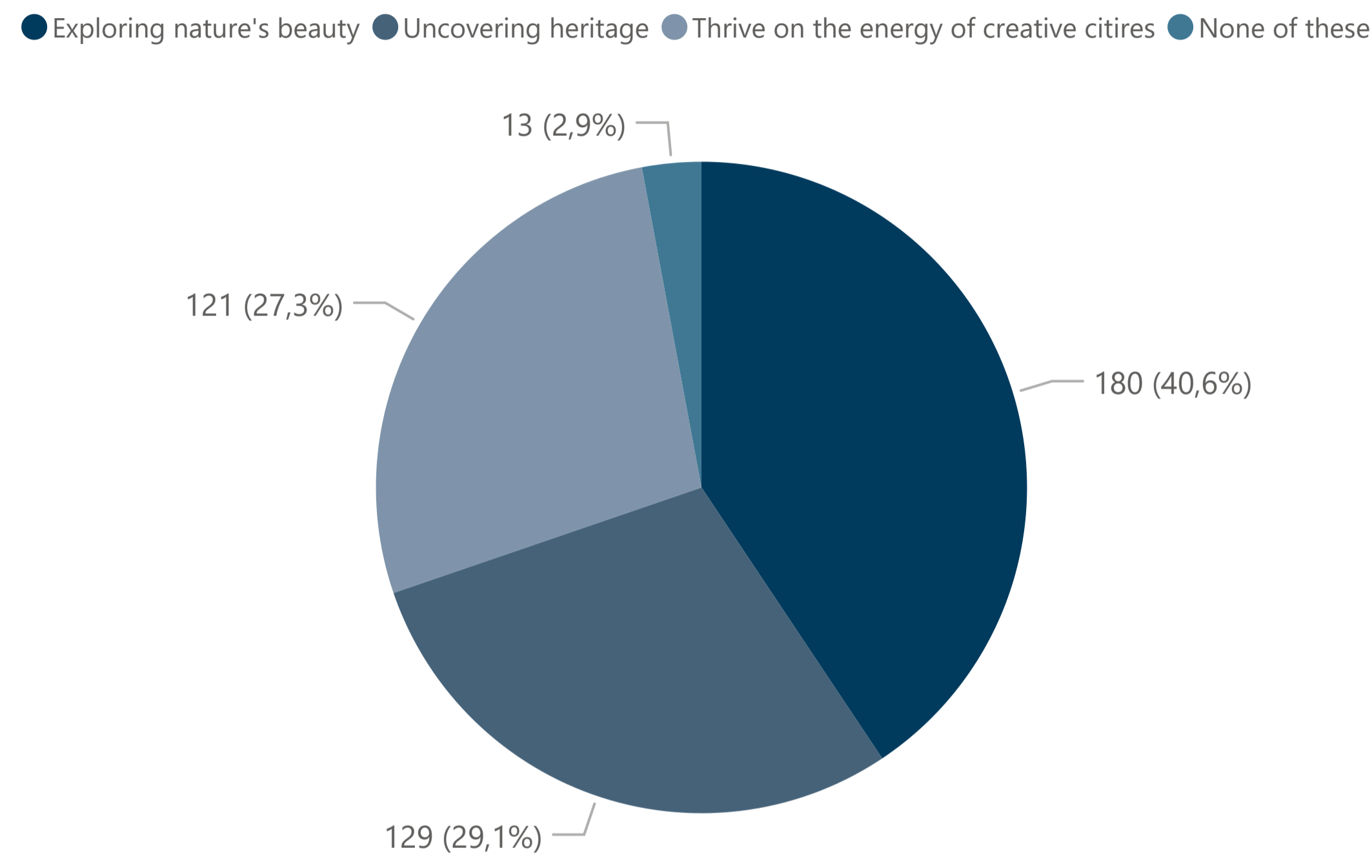


Jun '24 survey
No. of respondents:
381

Around 68.2% of the respondents intend to travel one or two times in the next 6 months.

Question: How many trips do you plan to take in the next 6 months, within Europe?

Respondents most likely to travel in the next 6 months, by type of traveller



Jun '24 survey
No. of respondents:
308

40,6% of European Travellers have as their main travel preference to explore nature's beauty and rural lifestyles. Uncovering heritage, history and ancestral roots to enrich their journey of self-discovery is the preference of 29,1%, while those that thrive on the energy of creative cities and immersing themselves in the cultural offering represent 27,3%.

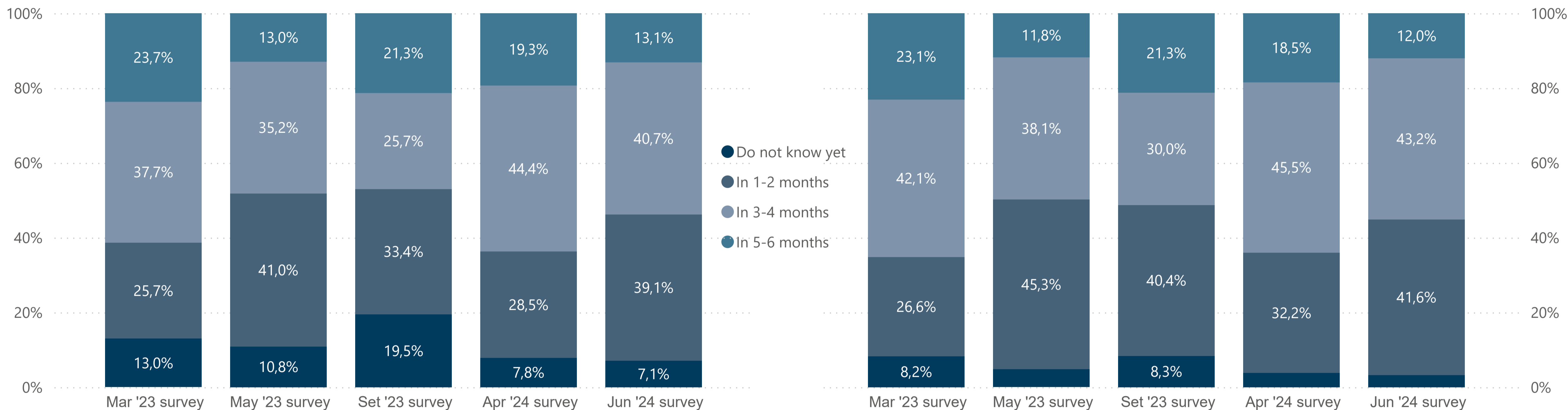
Question: Which of the following statements best describes your travel preferences?



When will Europeans travel next?

Total Sample

Early-bird travellers*



No. of respondents:
1873

No. of respondents:
1467

Compared to May 2023, travellers seems to be more certain of when they will travel next with 7,1% answering that they still don't know vs 10,8% last year. Also compared with May 2023, travellers will likely travel in the next 3-4 months that in the next 1-2 months.

*Early bird travellers refers to respondents with short-term travel plans/ most likely to travel in the next 6 months

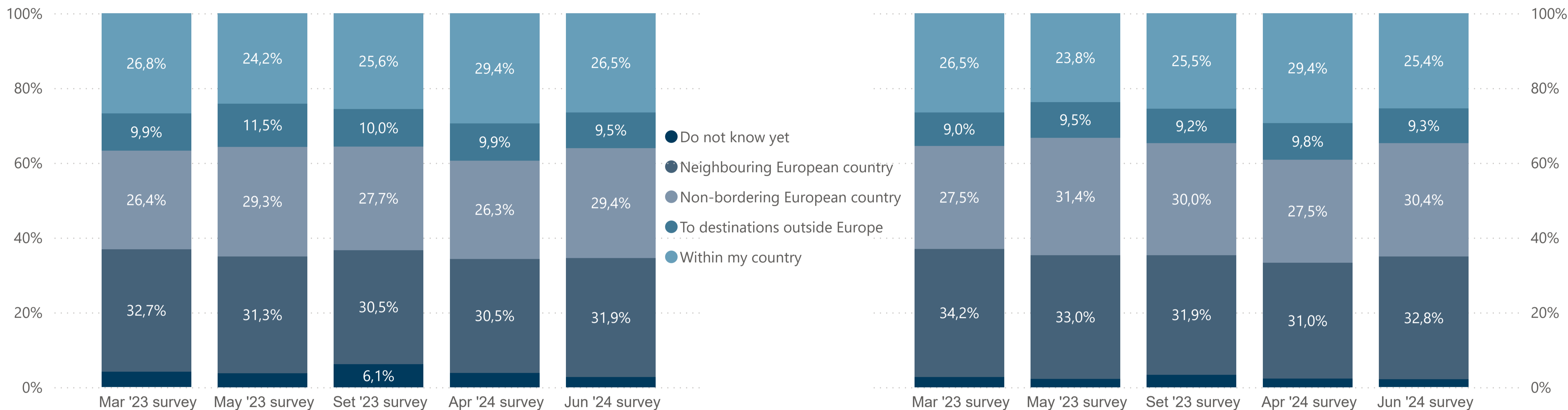
Question: When are you most likely to go on your next trip either in your country or within Europe?



Where will Europeans travel within the next 6 months?

Total Sample

Early-bird travellers*



No. of respondents:
1873

No. of respondents:
1467

International travel within Europe remains respondents leading choice, a trend equally strong among "early-bird" travelers. Is also noteworthy that travelling within the country has achieved its highest value, being the second preference of travelers, only 1,1% below travelling to a neighbouring country.

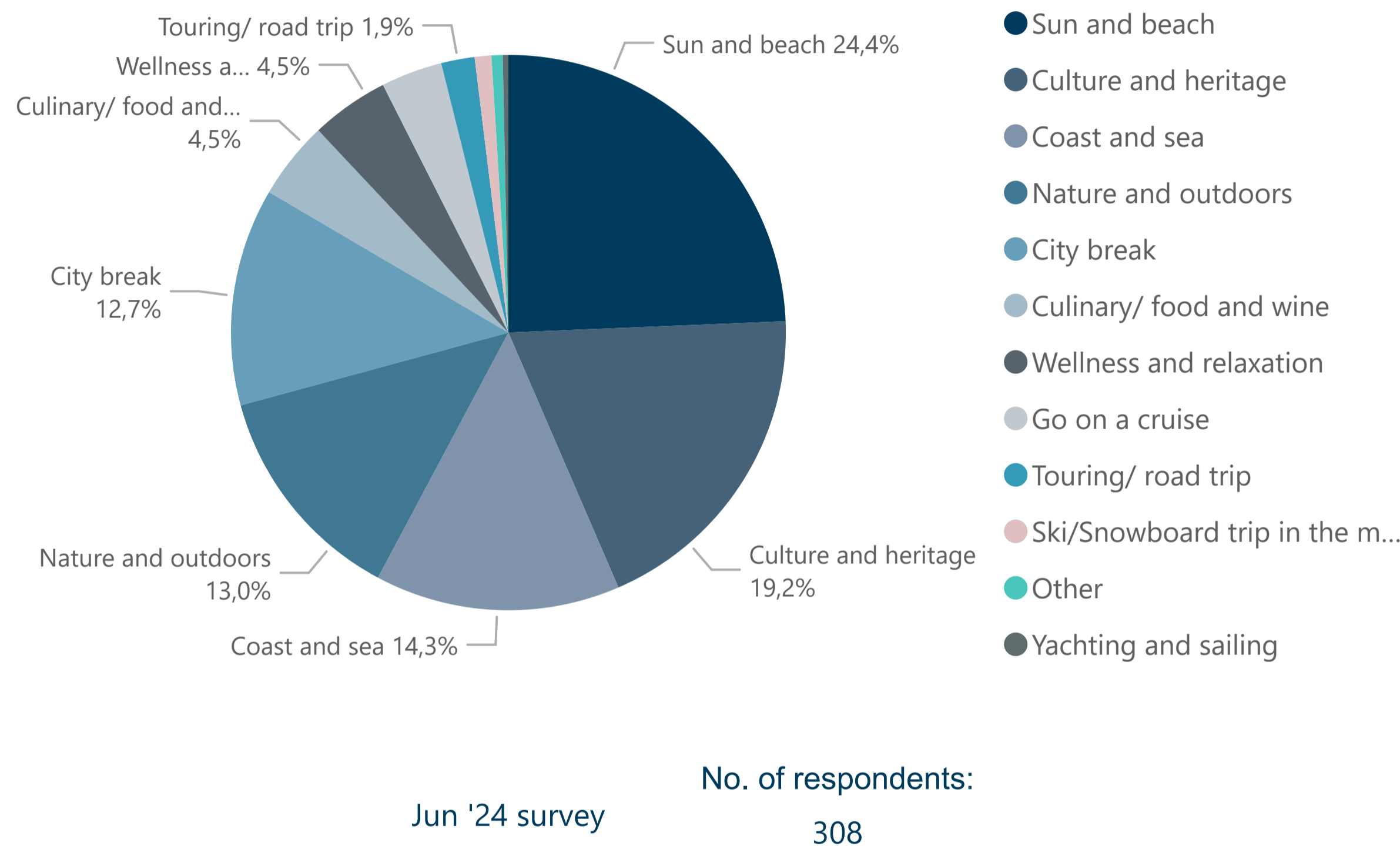
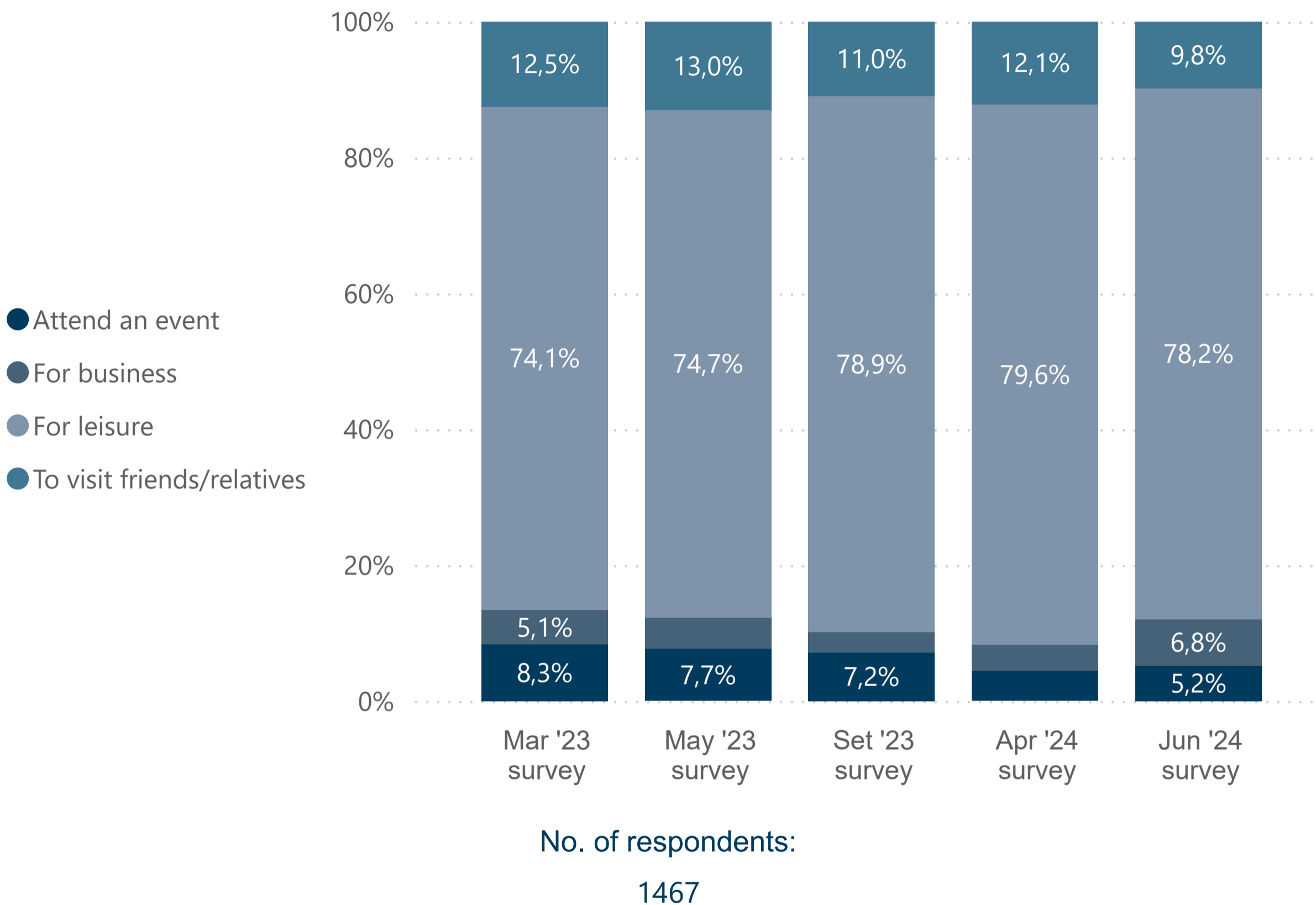
*Early bird travelers refers to respondents with short-term travel plans/ most likely to travel in the next 6 months

Question: When are you most likely to go on your next trip either in your country or within Europe?



Purpose of travel for respondents most likely to travel in the next 6 months

Preferred type of leisure trip for respondents most likely to travel in the next 6 months



Leisure is by far the main motivation to travel throughout the year (a trend continually sustained throughout the different waves), followed by visits to friends or relatives.

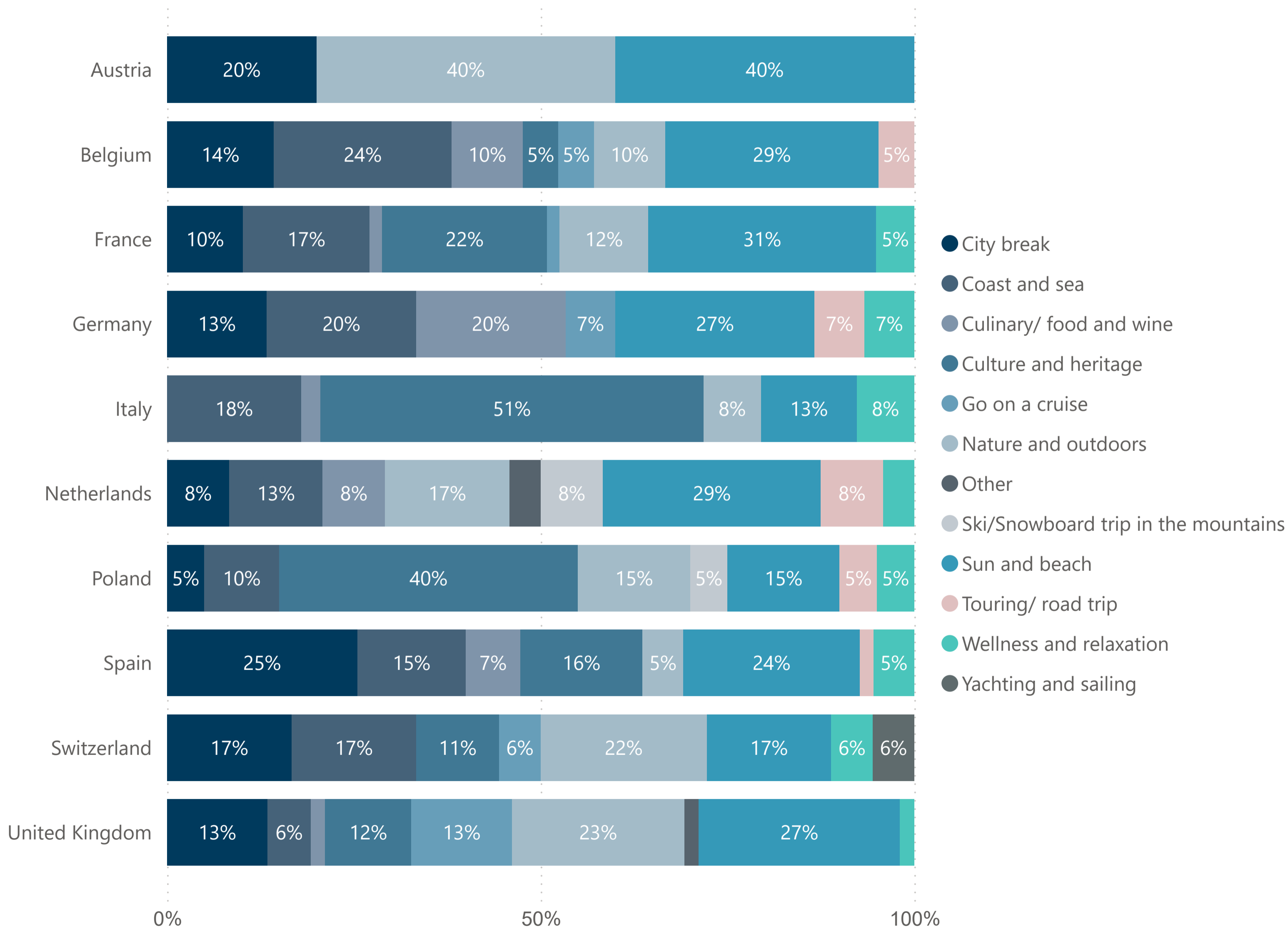
38,7% of Europeans that are willing to travel to Portugal in the next 6 months will do it for sun and beach (24,4%) or the coast and sea (14,3%) motives. Culture and Heritage (19,2%) and City Break (12,7%) are the other top motives.

Question: For what reason are you most likely to travel within Europe next?

Question: What type of leisure trip within Europe are you most likely to undertake next?



Preferred type of leisure trip for respondents most likely to travel in the next 6 months, by country



Jun '24 survey
No. of respondents:
308

Respondents from **Austria and France** head for Sun and Beach.



Germany and Belgium respondents head for Coast and sea destinations.



Italy and Poland travellers head for culture and heritage.



Respondents from **Germany and Italy** have the highest % for Wellness and relaxation.



Nature and outdoors are mainly in demand for **Germany, United Kingdom, Austria and Switzerland** travellers.



City break are in demand for **Spain, Netherlands and Poland** travellers.



Question: What type of leisure trip within Europe are you most likely to undertake next?

02

TRAVEL PLANNING

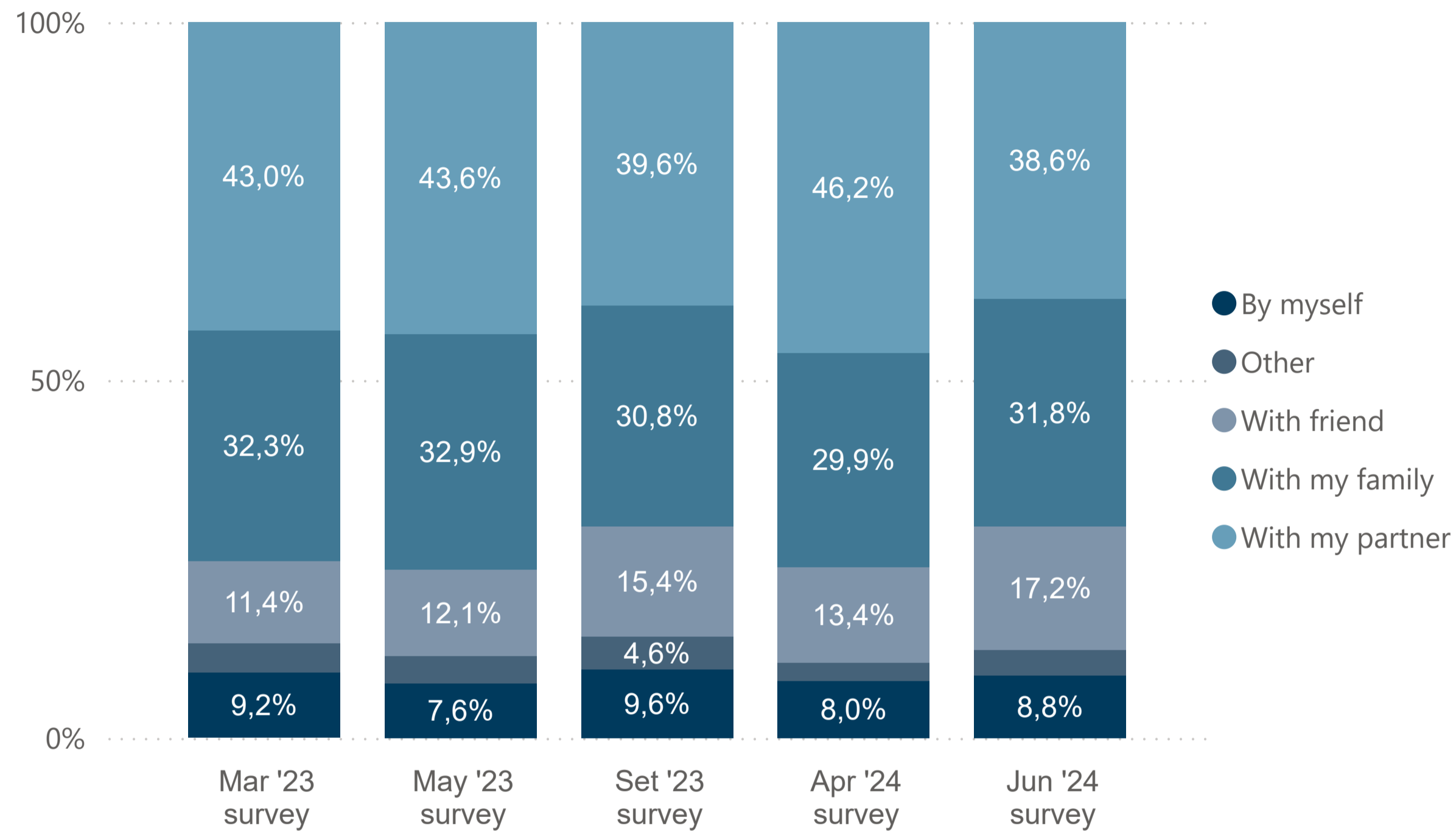


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Preferred travel companion for respondents who are most likely to travel in the next 6 months



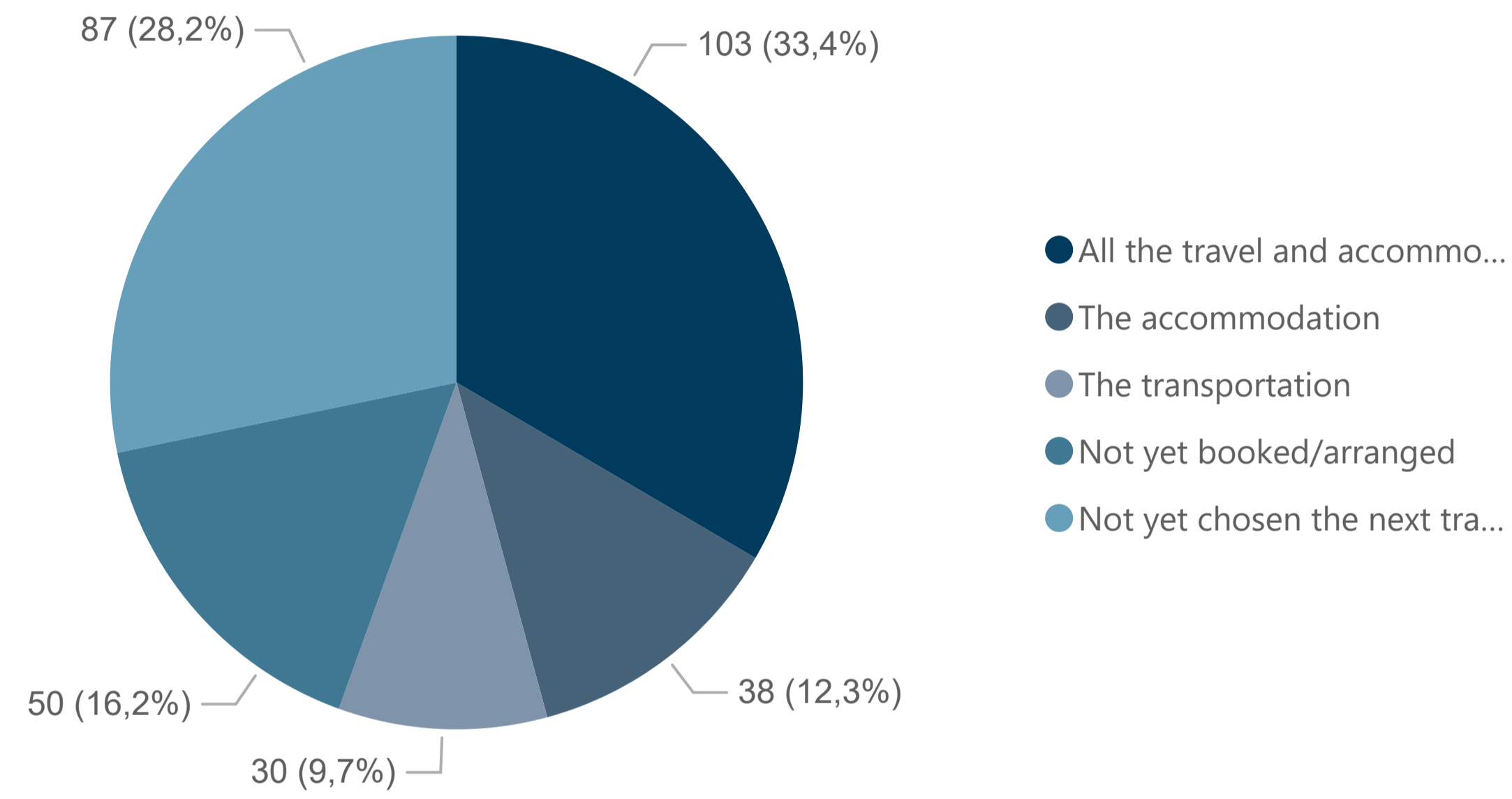
No. of respondents:
1467

The main preference for travelling continue to be travelling with the partner followed by travelling with the family. Comparing with the May'23 wave, there was a decrease in the intention of travelling with the family,



Question: With whom are you most likely to travel during your next trip within Europe?

Status of planning for the next trip



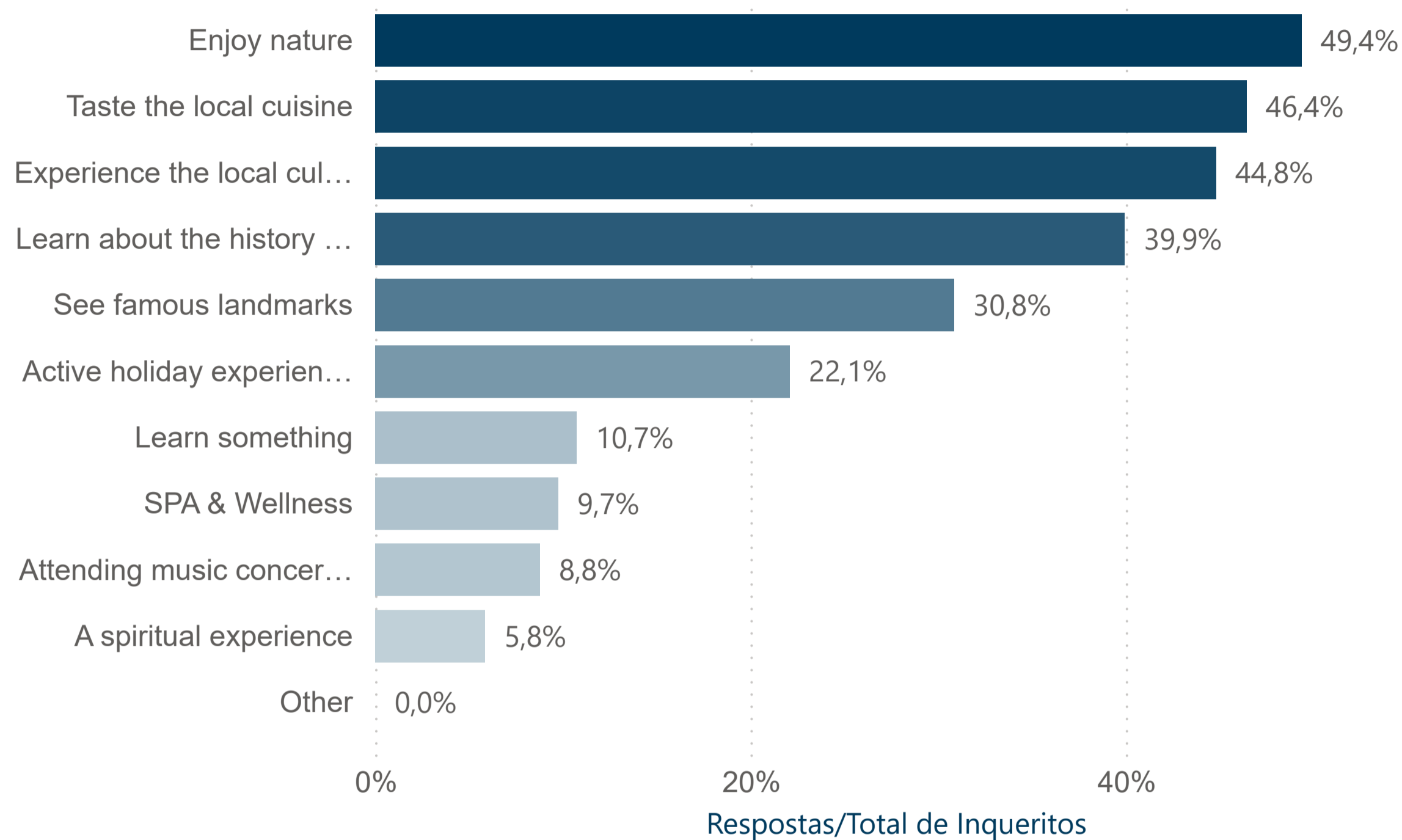
No. of respondents:
308

28,2% of the respondents haven't yet chosen the next travel while 33,4% have already planned all the travel and accommodation.

Question: Please select a response which best describes the planning for your next trip



Travel experiences that europeans look for



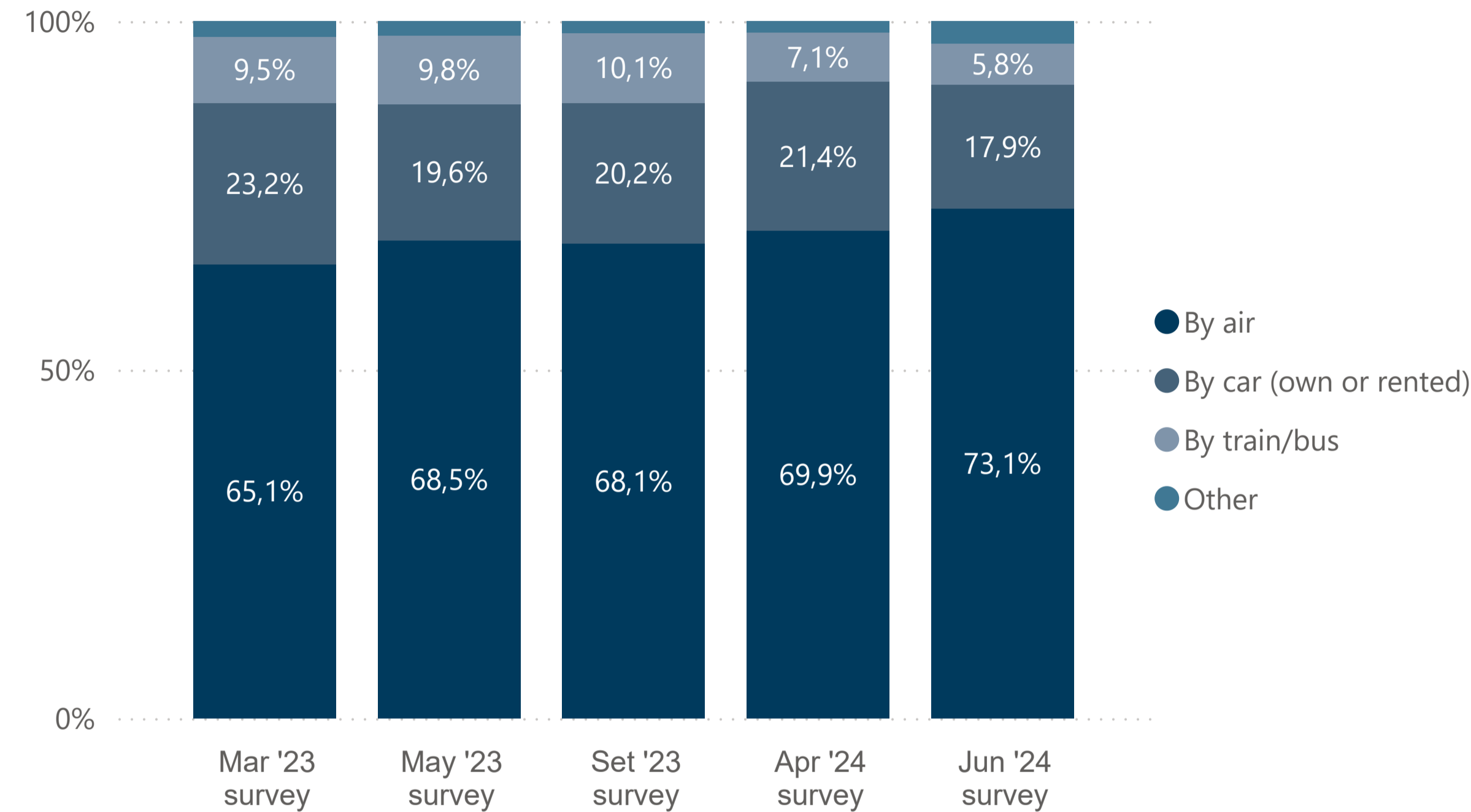
No. of respondents:

Jun '24 survey

308

The top 3 travelers experiences that Europeans look for when travelling to Portugal are: enjoy nature, taste the local cuisine and experience the local culture.

Top 4 modes of transport for respondents most likely to travel in the next 6 months



No. of respondents:

1467

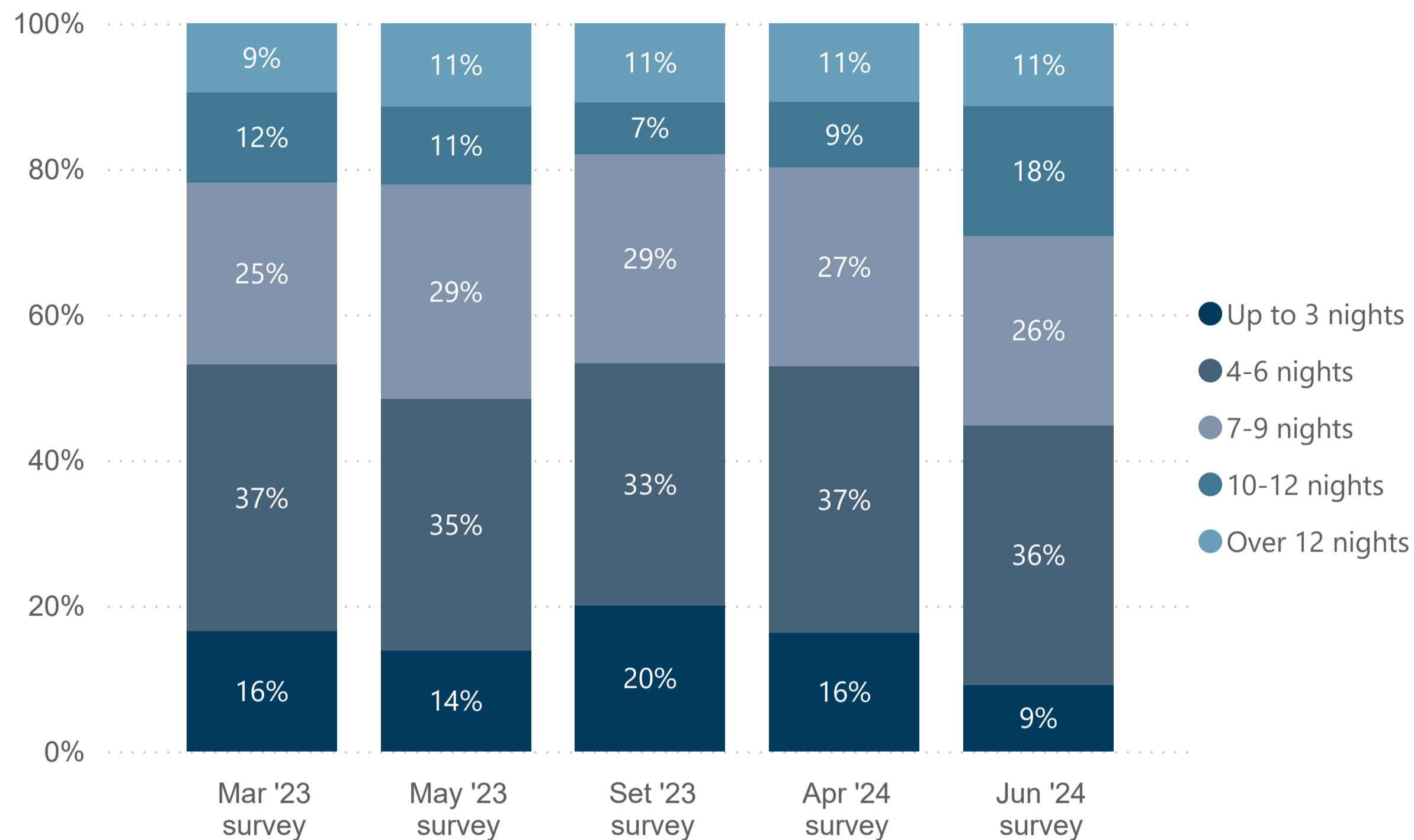
Air travel remains from afar the preferred means of transport of respondents that plan to travel to Portugal in the next 6 months.

Question: Which of the following travel experiences will you look for during your next trip in Europe? (select 3)

Question: Which of the following modes of transport would you most consider using during your next trip within Europe?



Length of next overnight trip

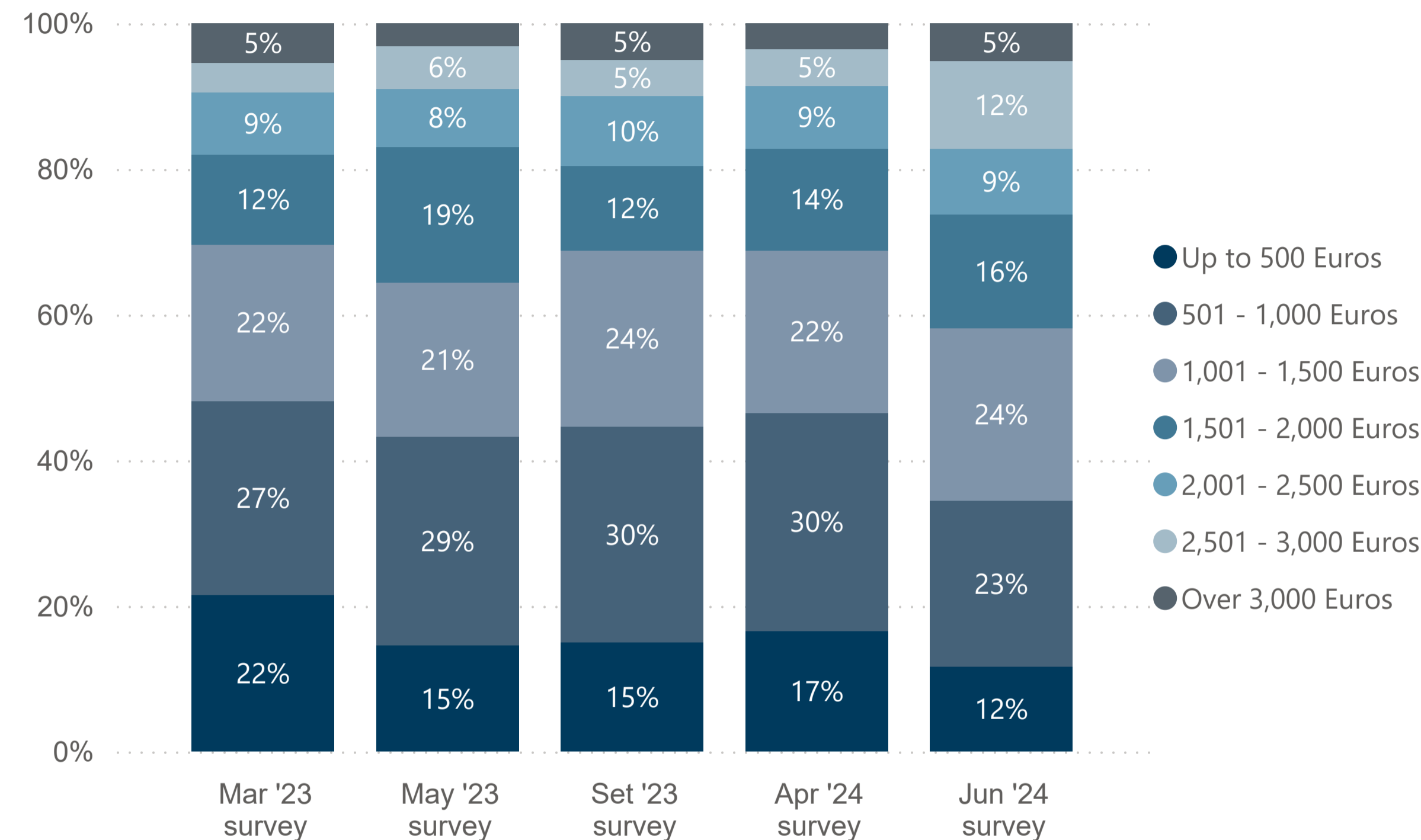


No. of respondents:
1467

Travelers continue to prefer staying mainly 4-6 nights in Portugal, preference immediately followed by the 7-9 overnight stays.

Question: What would be the length of your next overnight trip?

Investing in the next overnight trip



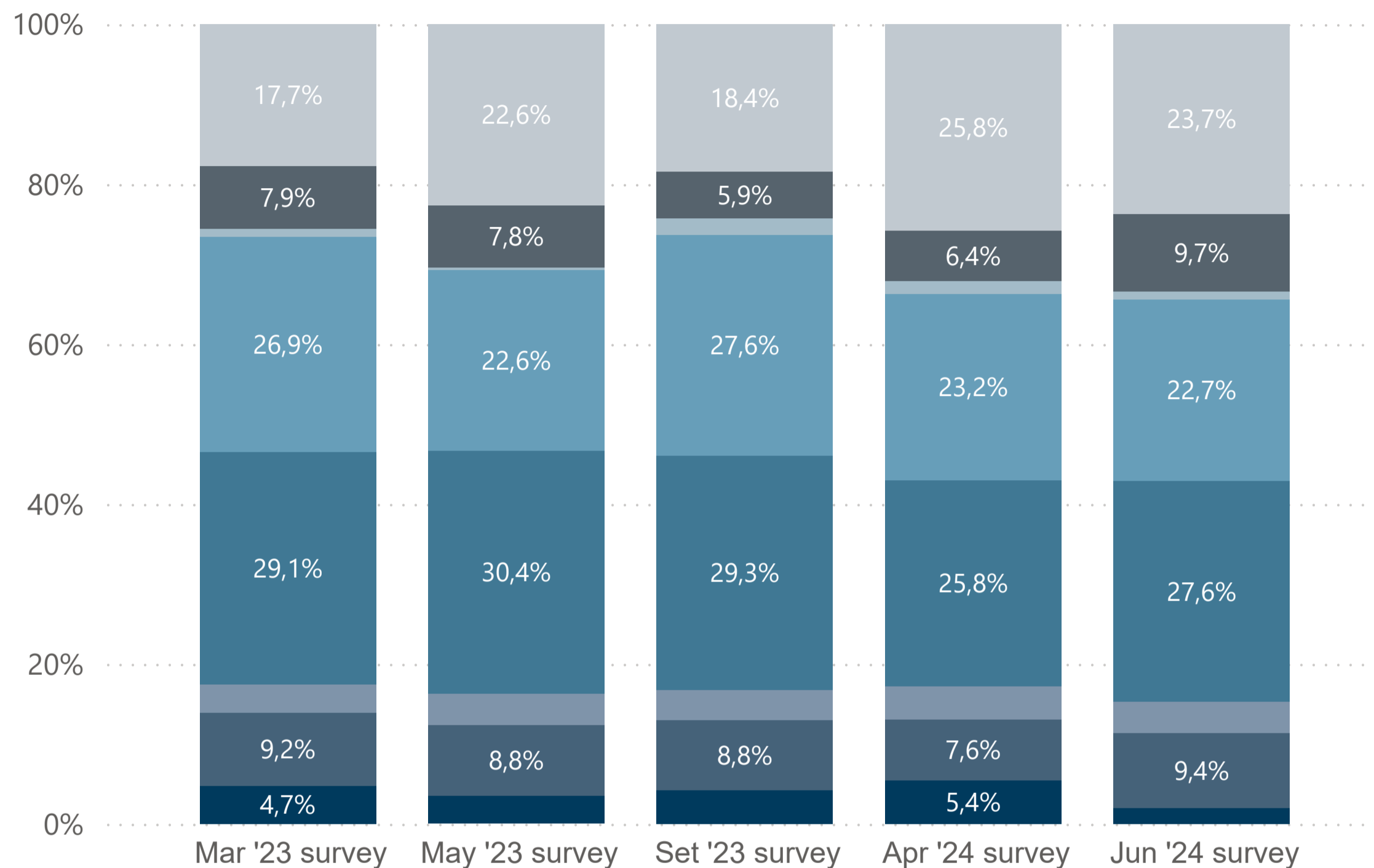
No. of respondents:
1467

For the first time, more travelers planning to travel to Portugal intend to spend around 1001€ - 1500€ per person (including accommodation, transportation and travel activities), instead of the range of 501€-1000€.
A group of respondents (17,2%) is willing to spend above 2500€, an increase of 8,2% vs May 2023.

Question: How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

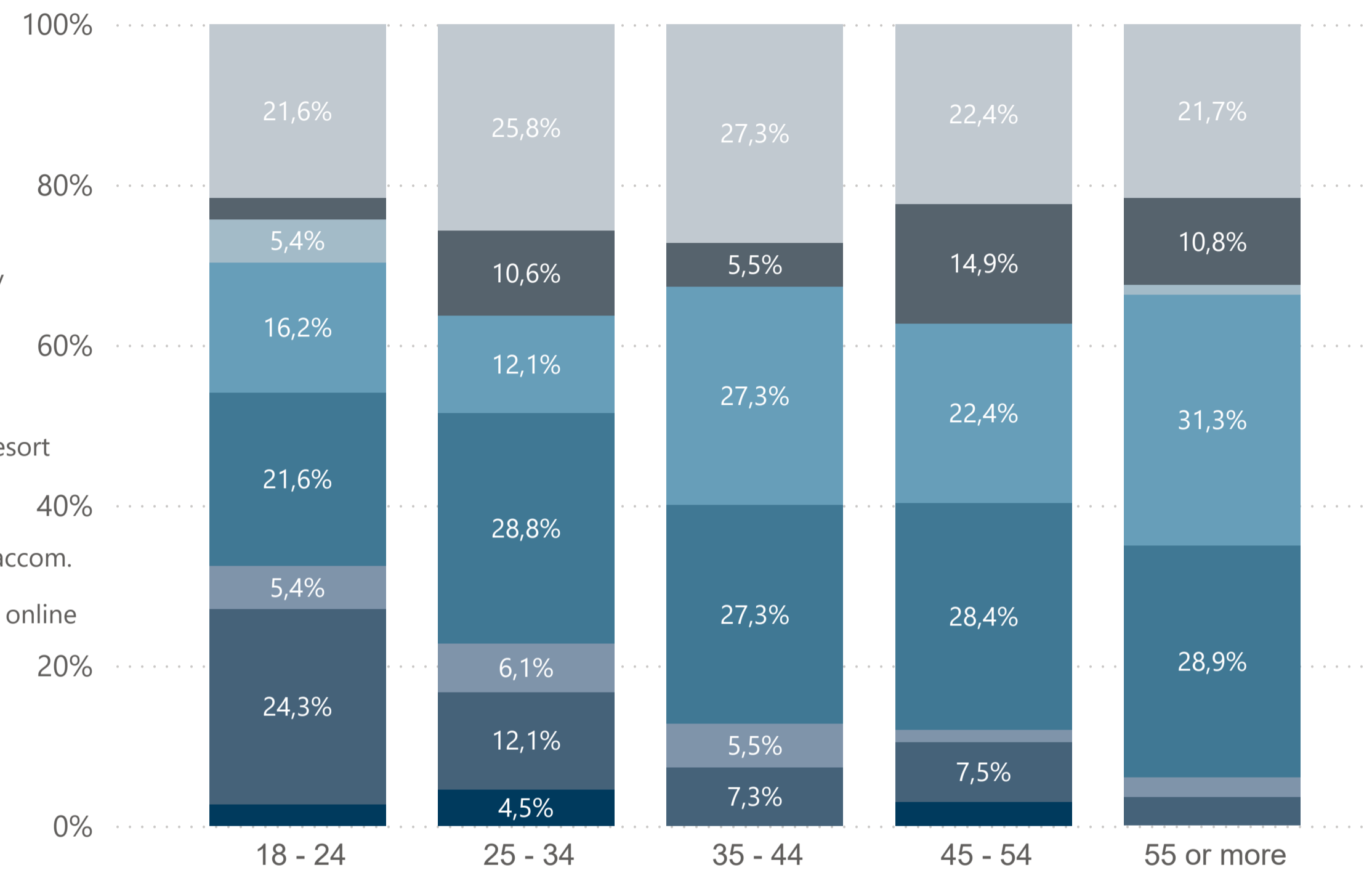


Preferred type of accommodation



No. of respondents:
1467

Preferred type of accommodation, by age



No. of respondents:
308

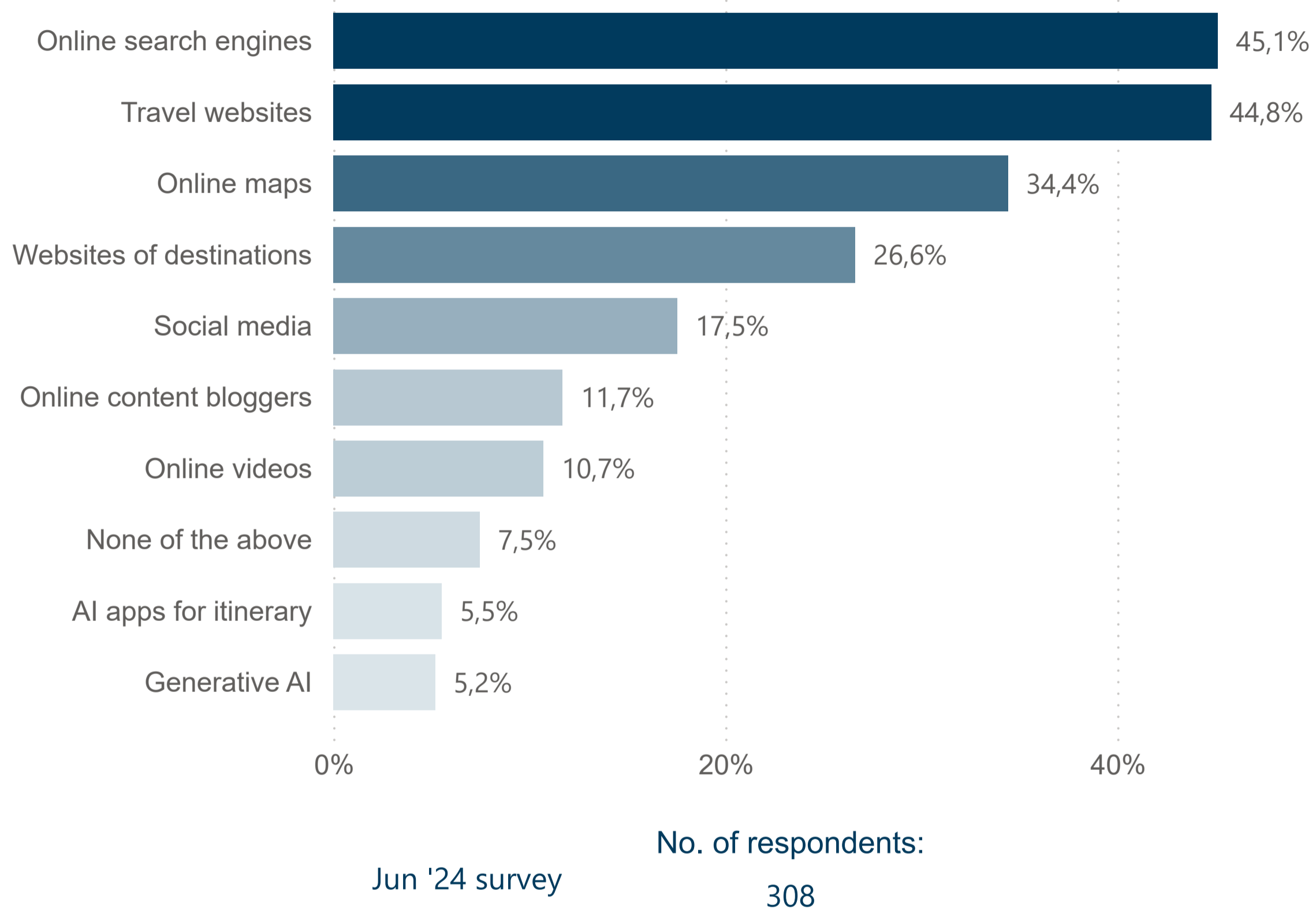
The preferred type of accommodation for Europeans travelers are Hotel chain or resort (27,6%), Short-term rental via online (23,7%) and Independent Hotel/resort (22,7%).

On the groups of 18-24 there is a preference for staying with friends or family while the other age groups prefer hotel/resort (either independent or a chain).

Question: Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

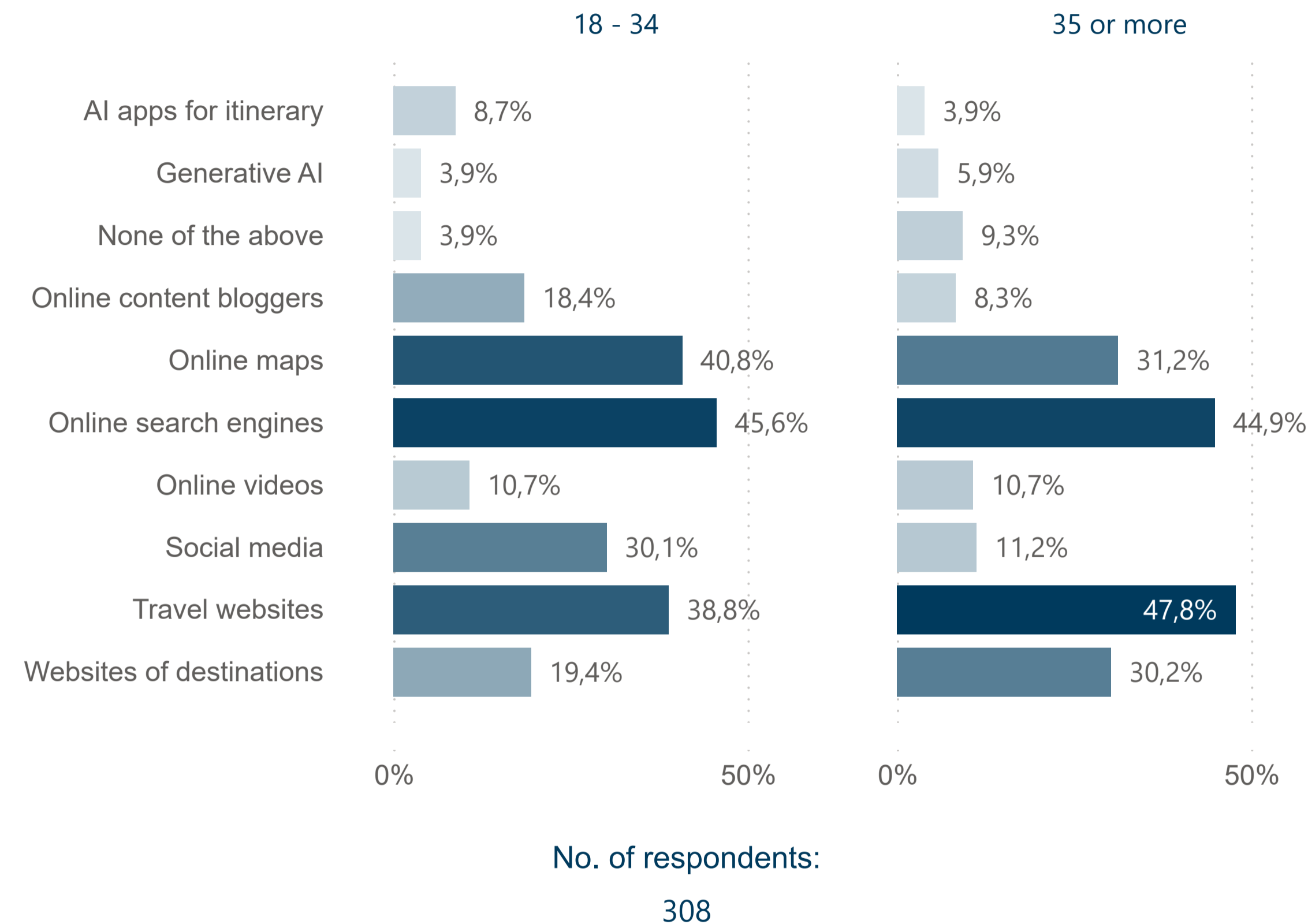


Travel experiences that europeans look for



Of the digital tools used by travelers, 45,1% use online search engines, while 44,8% use travel websites as their main tool for plan their trip within Europe.

Travel experiences that europeans look for



Comparing by age groups, those with less than 35 years tend to use more Social media and Online content bloggers, while those with more then 35 tend to use more Travel websites or the Websites of destination.

Question: Which digital tools have you used (or will use) to plan your trip within Europe in the next 6 months?

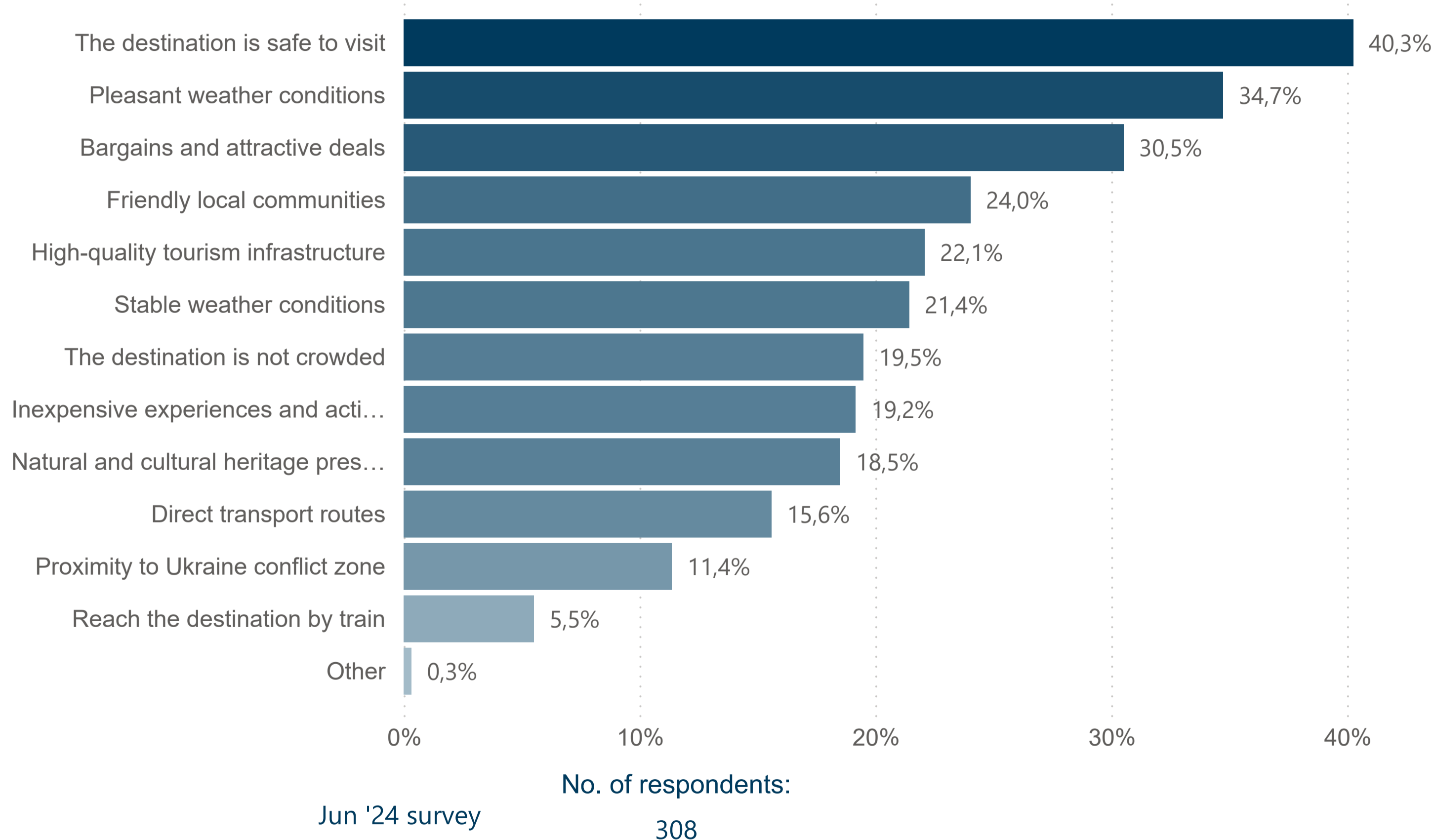


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Criteria considered to play the most important role in choosing the respondents next holiday destination



Destination safety was the most selected one in this wave, being considered the most important criteria by more than half of the travelers.

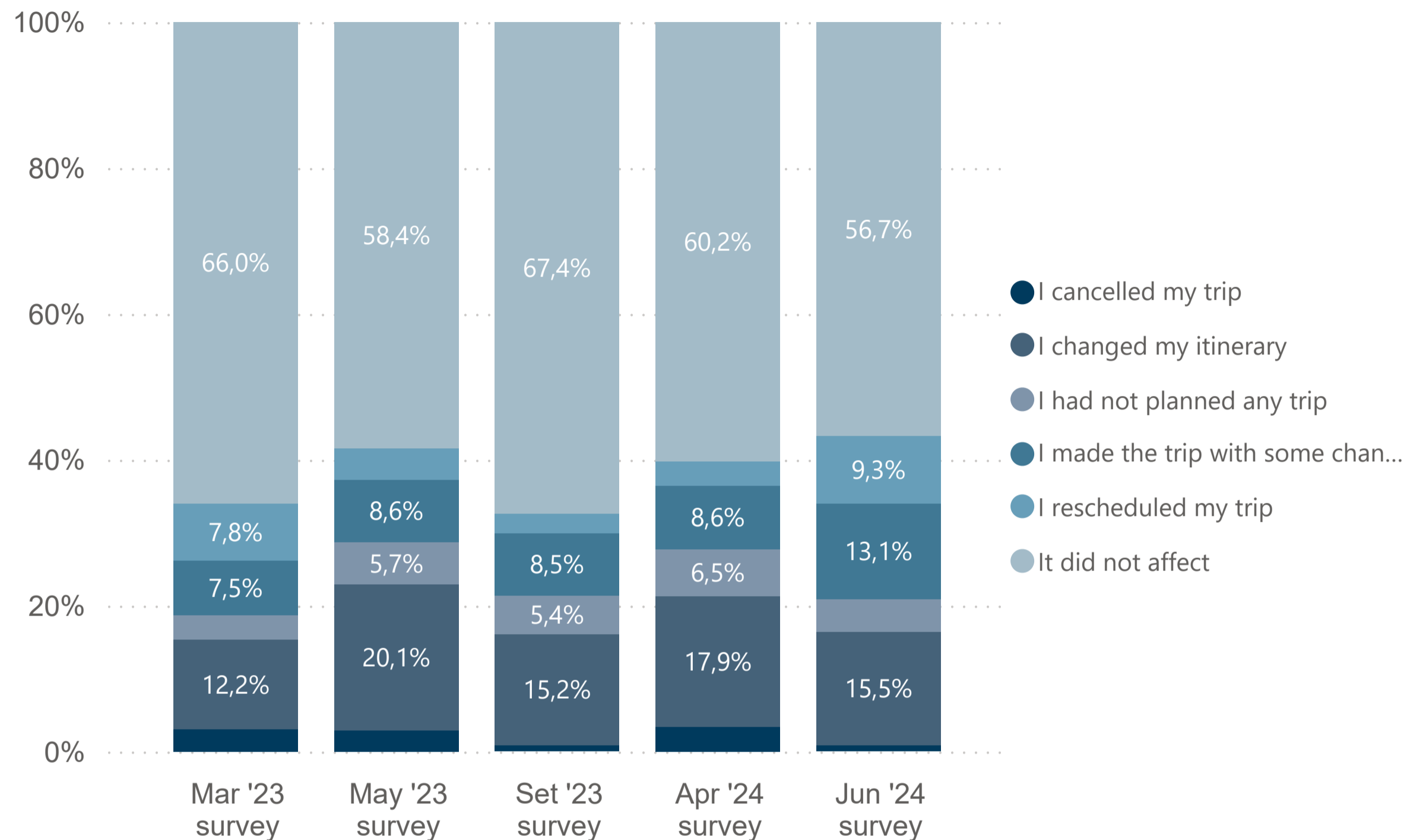
Having **pleasant weather conditions** or getting **bargains and attractive deals** were the other on the top 3 criteria, with 34,7% and 30,5% respectively.

The preference for the remaining criteria is somewhat scattered.

Question: What criteria will play the most important role in choosing your next holiday destination? (up to 3 answers)



How has the ongoing war affected travel plans?

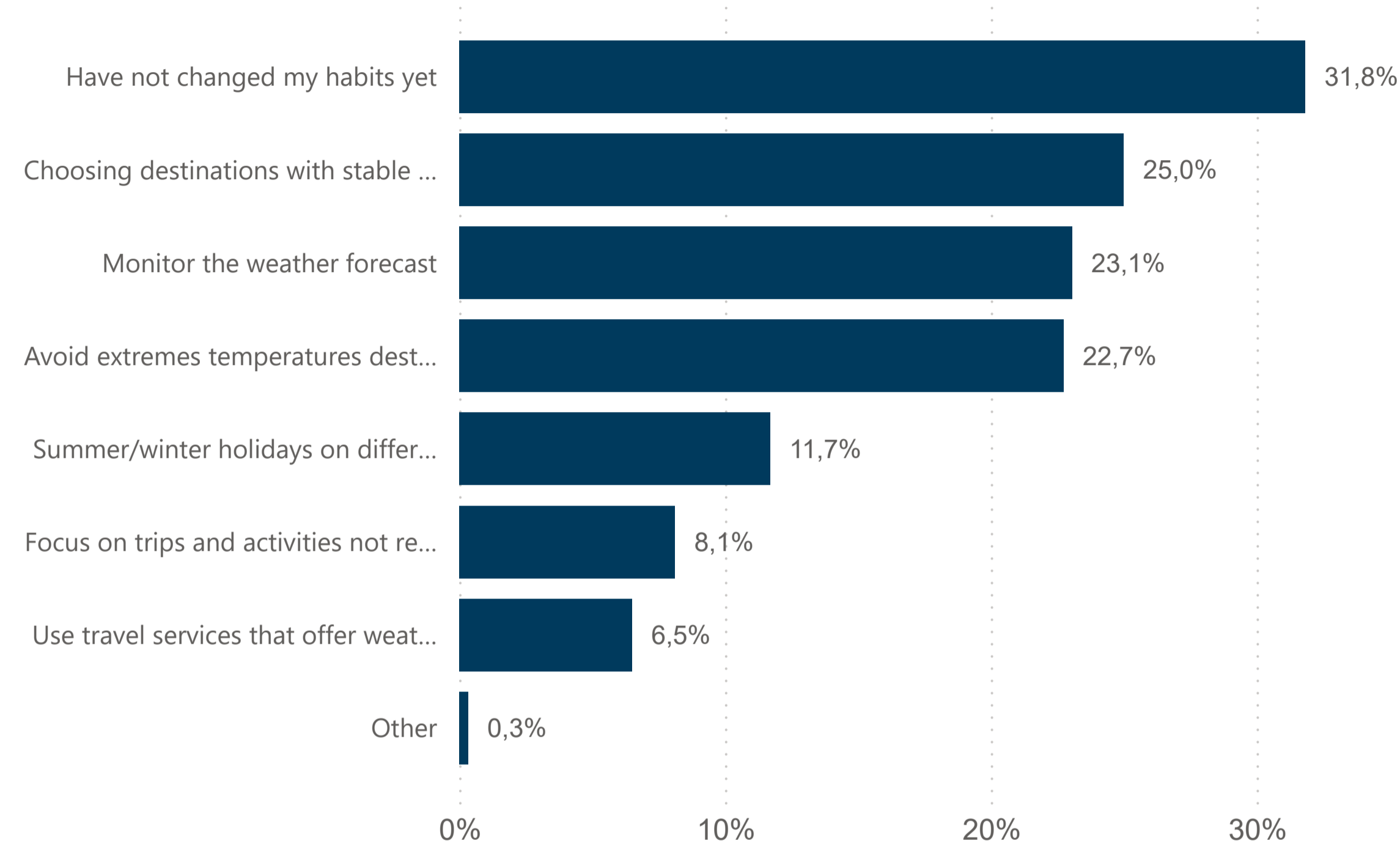


No. of respondents:
1467

56,7% of the respondents declared that the ongoing war in Ukraine didn't affect their travel plans.

Question: How has the ongoing war between Russia and Ukraine affected your planes to travel within Europe in the next 6 months?

How has the changing climate been influencing your travel habits?



No. of respondents:
Jun '24 survey
308

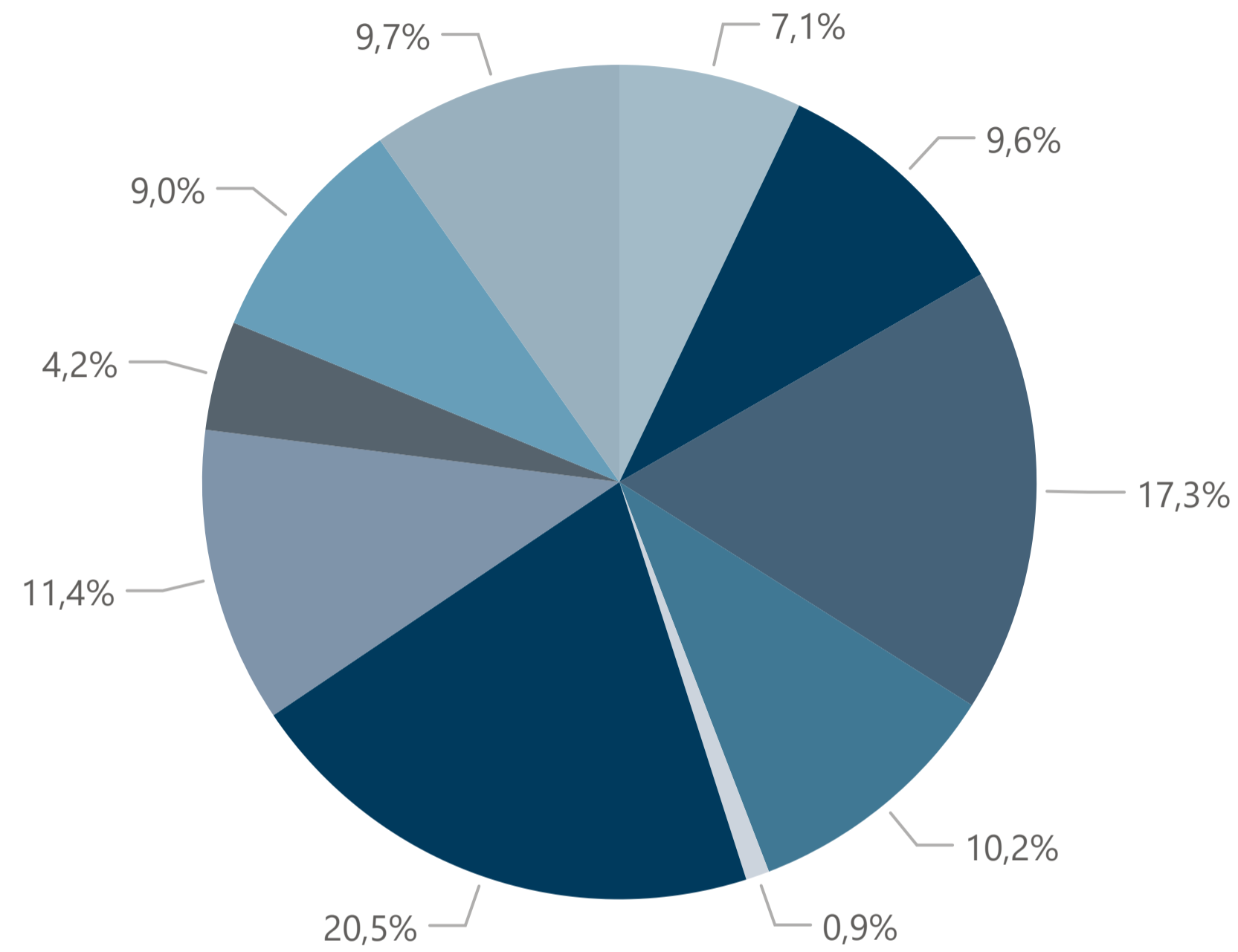
Around a third of the travelers have not changed their habits yet, with those that have made changes focusing in choosing destinations with stable weather, avoiding destinations with extremes temperatures and monitoring the weather forecast.

Question: How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) been influencing your travel habits? (multiple choice: up to 2 answers)

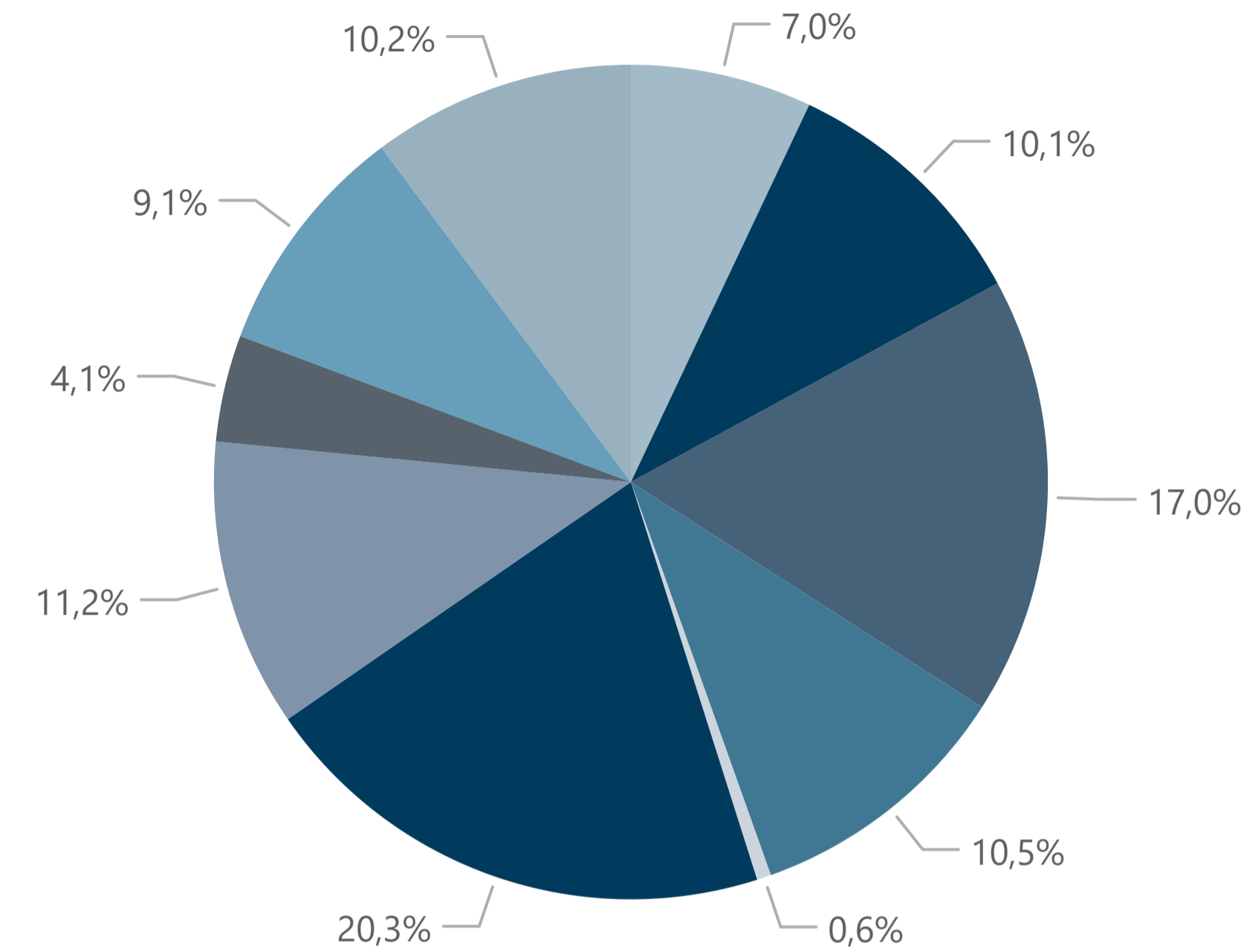


Leading concerns
*Total sample vs. early-bird travellers**

- Becoming ill during my trip
- Booking and cancellation policies
- Disruptions in transport options
- Economic situation and personal finances
- Extreme weather
- Other
- Rise in the overall costs due to inflation
- The conflict between Russia and Ukraine
- The environmental footprint
- Too many visitor in the destinations
- Travel safety due to tensions in the Mid...



No. of respondents:
381



No. of respondents:
308

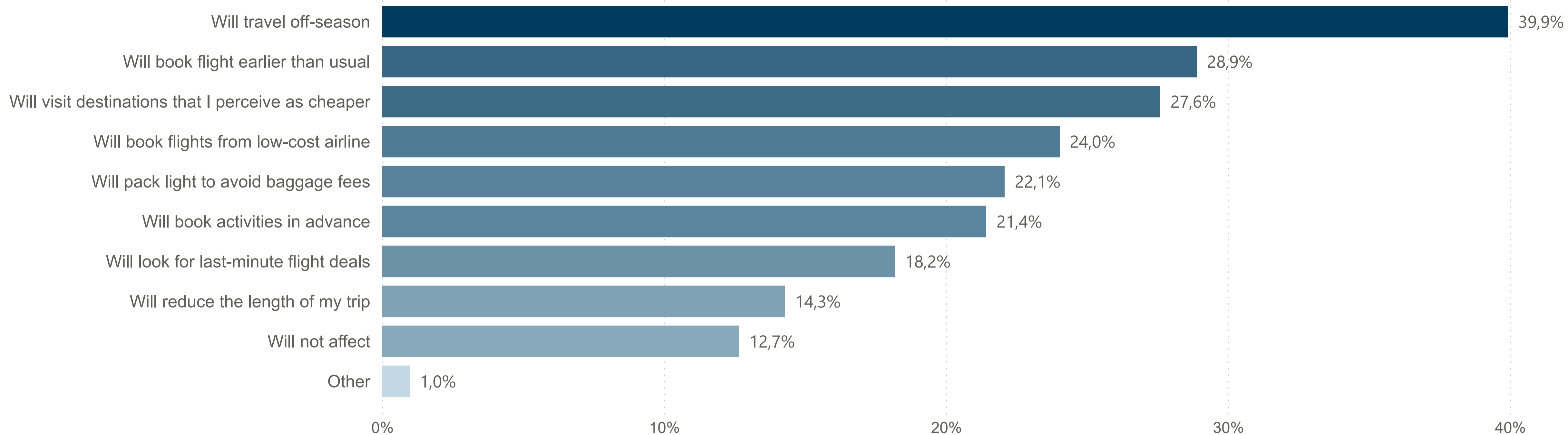
Rising costs due to inflation is now the main concern of Europeans when travelling followed by economic situation and finances and the ongoing conflict on Ukraine

The respondents that want to travel within the next 6 months have numerous concerns. The main ones are the rise of costs due to inflation, economic situation and finances, and the ongoing conflict in Ukraine.

Question: What currently concerns you the most about travelling within Europe?



Respondents' sentiment towards the rising of travel costs and inflation before the trip



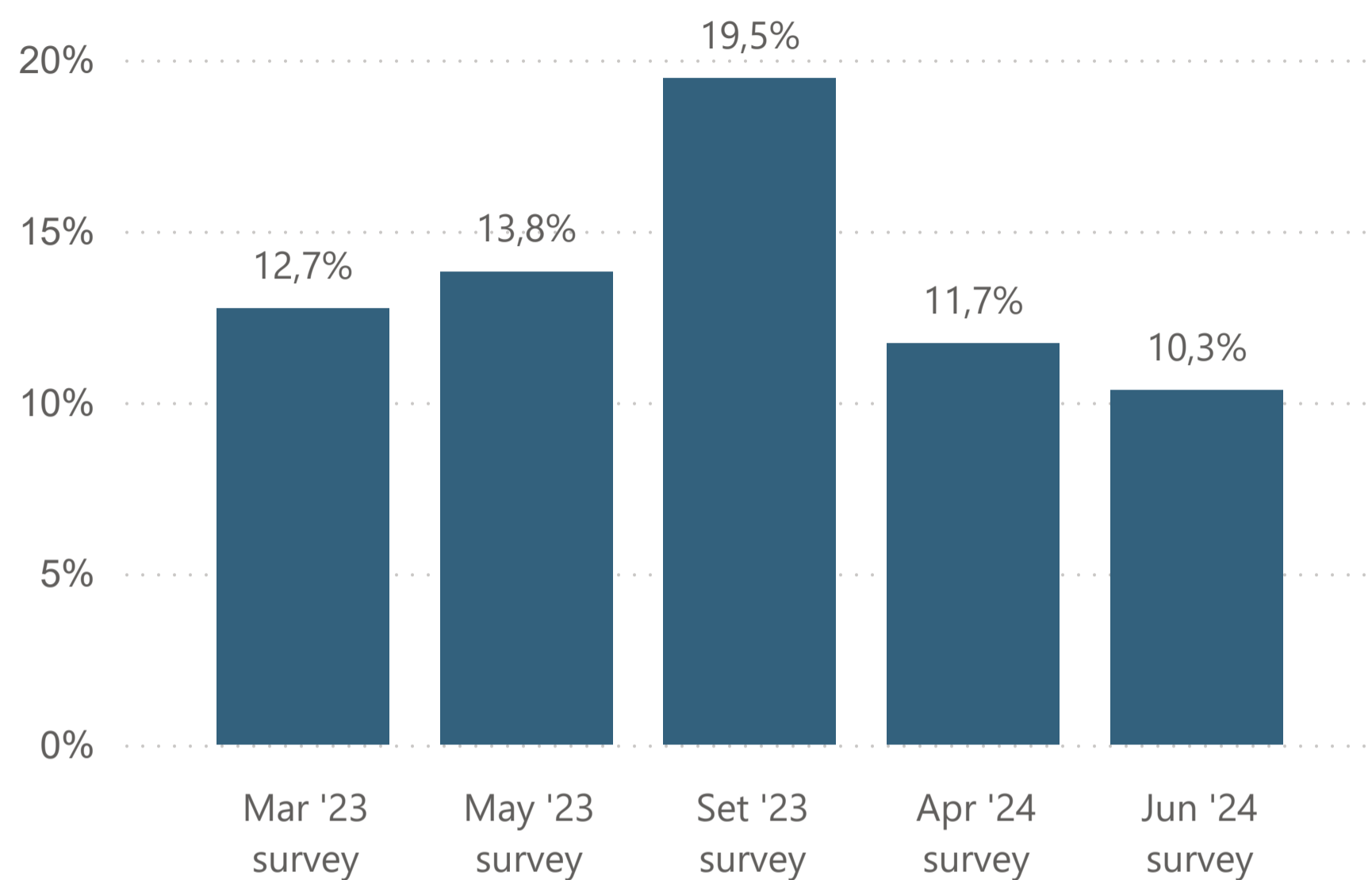
No. of respondents:
Jun '24 survey
308

39,9% of the respondents will travel off-season to get better prices, with 28,9% will book the flight earlier than usual and 27,6% will visit destinations that are perceived as cheaper. Other behaviours that travelers might adopt before reaching their destination includes booking flights from low-cost airline (24%), packing light to avoid baggage fees (22,1%) and booking activities in advance (21,4%).

Question: In the context of inflation and rising costs of travel, which of the following travel behaviours are you most likely to adopt before reaching your next destination?



% of respondents that do not know when they will travel next



THE LEVEL OF UNCERTAINTY FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

10,3% of respondents state that **they do not know when they will travel next**

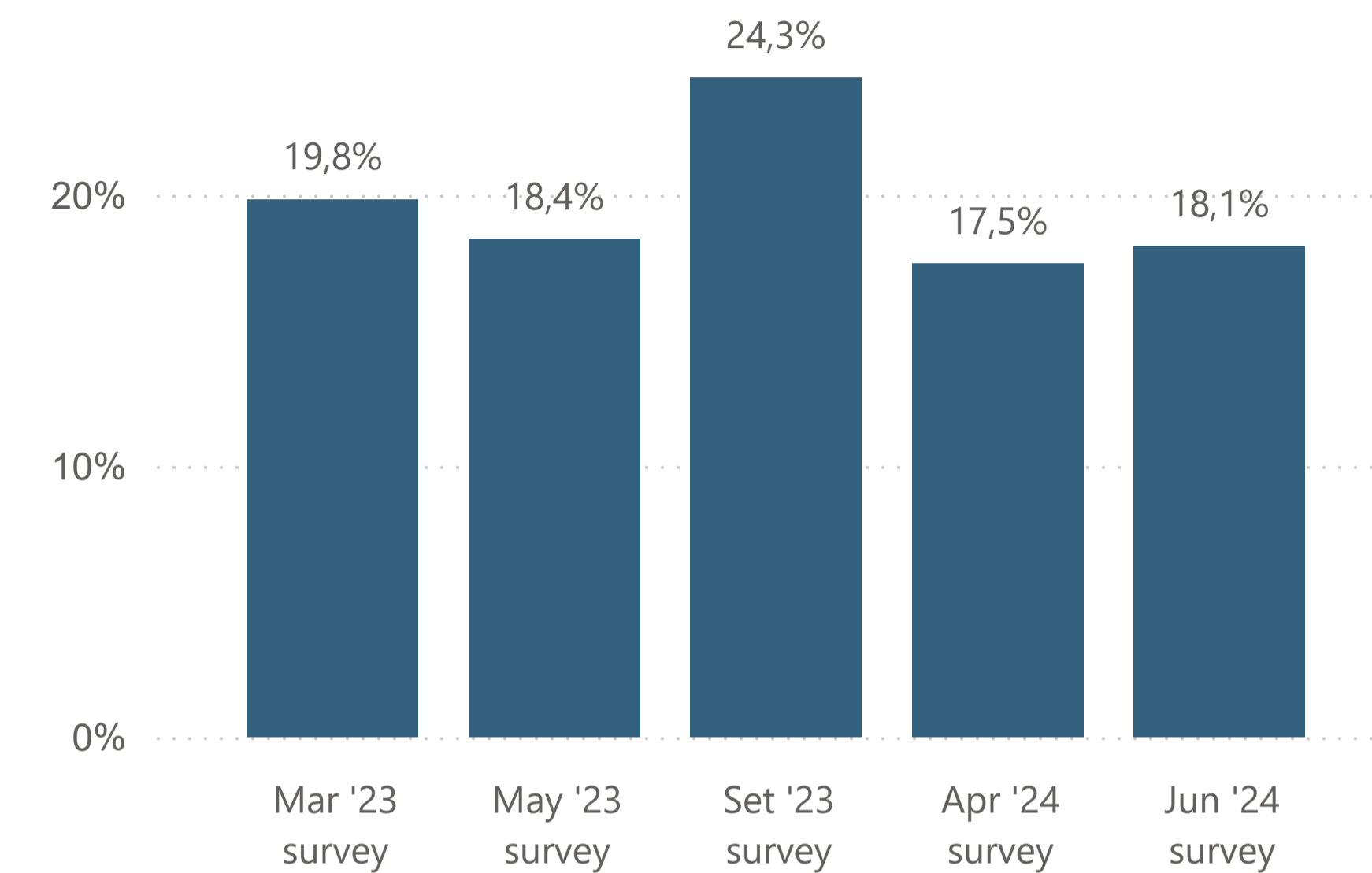
18,1% of respondents **haven't yet planed anything** including where they will travel next.

7,2% of respondents state that **they do not know where they intend to travel to** in the next 6 months

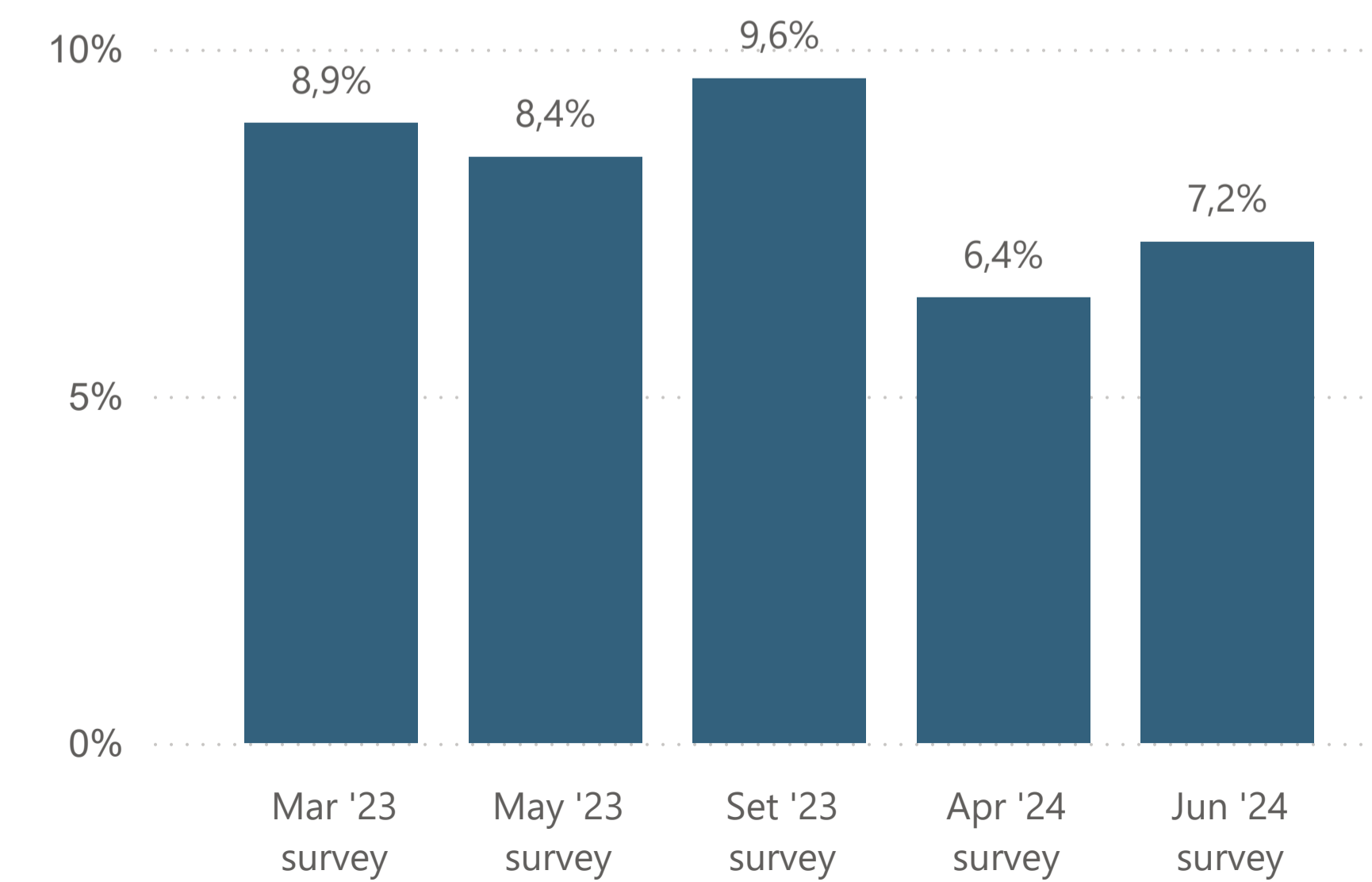
8,6% of respondents **don't know how many trips** they will take in the next 6 months within Europe

No. of respondents (Total):
29.809

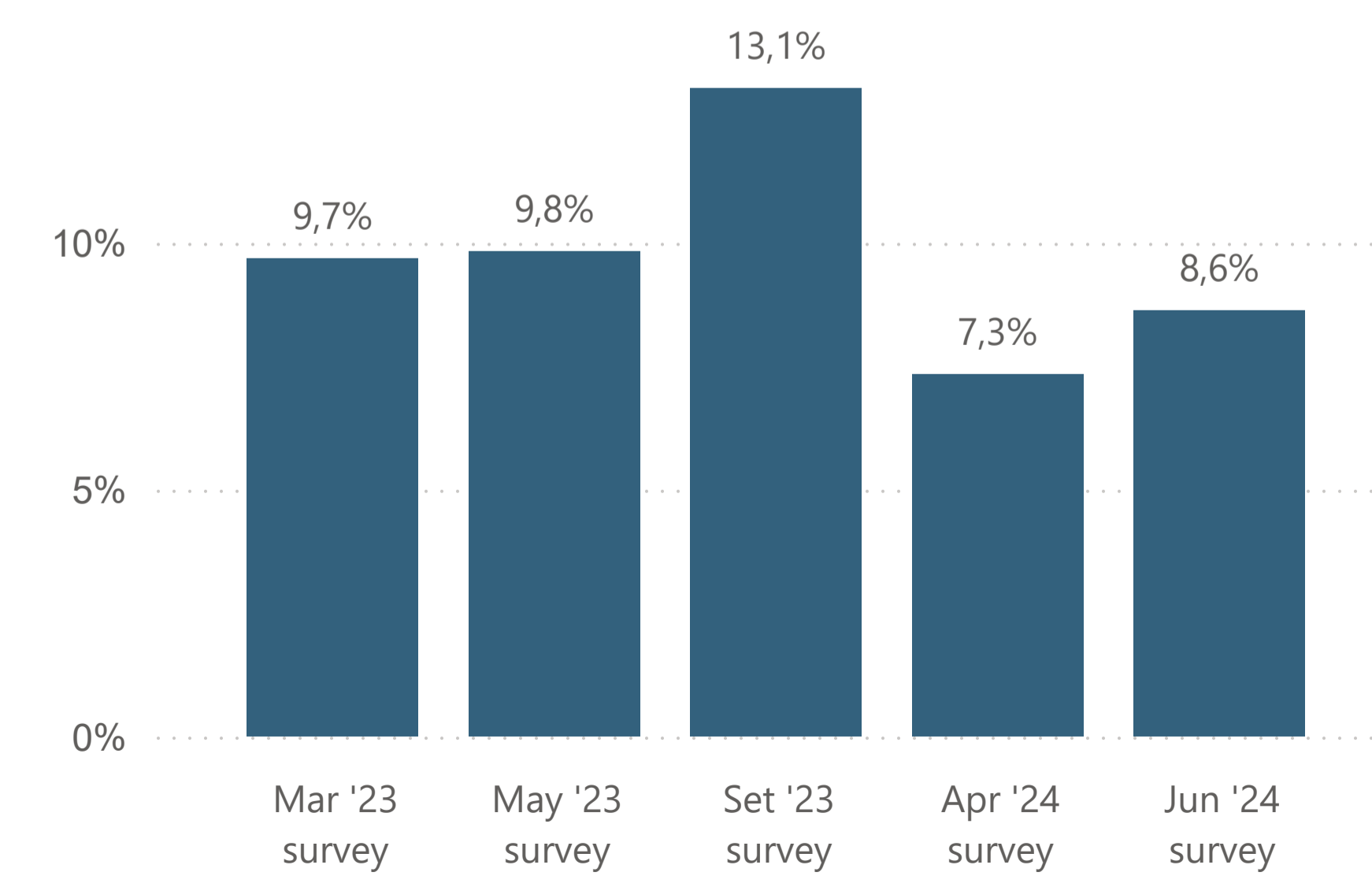
% of respondents that haven't planned anything



% of respondents that do not know when they will travel next



% of respondents don't know how many trips will take



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Credits

Owner: © Turismo de Portugal, I.P.

Author: Knowledge Management
Business Intelligence

Source: European Travel Commission (ETC)



Information Classification: External Use

Report Date: june 2024