



# 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 **21th 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:**

- **72% of surveyed Europeans planning to travel in the next 6 months**, representing a 3% decrease compared to a year ago. **80% of Europeans aged 55+ are the most eager to take a trip over the next six months.**
- **61% of travelers plan to make multiple trips in the next six months** with younger europeans aged 18-24 the most inclined to take multiple trips, with 38% planning to make at least 3 trips the next six months.
- The main concerns for Europeans when choosing a travel destination is the **affordable prices** (22%) followed by **destination safety** (18%) and the **weather stability** (14%)
- **50% of Europeans have not yet booked their next trip.**
- **60,5 % of Europeans intending to travel will visit another European country,**
- **Travel websites** (19,4%), **search engines** (19,4%) and **online maps** (13,1%) are the main digital resources used to plan a trip.
- Europeans most desired leisure for the autumn/winter are **Sun & Beach** (23%), **Culture & Heritage** (18%) and **Nature & Outdoors** (17%)
- **81% of Europeans adapt their travel behaviour to the climate crisis.** The most frequent habit is reviewing weather forecasts before finalizing the travel plans.
- **The majority of Europeans prefer to fly to their next destination (54,9%),** while greener alternatives like train or bus are preferred by 15,8%.
- With financial worries persisting, Europeans are trying to limit costs at the destinations.

\***Early-bird travellers** refers to survey respondents that are most likely to travel in the next 6 months/ have short term travel plans

METHODOLOGICAL NOTES

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 18 | Apr '24 survey | 5859   |
| Wave 19 | Jun '24 survey | 5955   |
| Wave 20 | Set '24 survey | 6001   |
| Wave 21 | Mar '25 survey | 5974   |

The present report is about data (wave 18 to wave 21) from above respondents that selected **Portugal** in the question **'To which country(ies) do you plan to travel next?'**

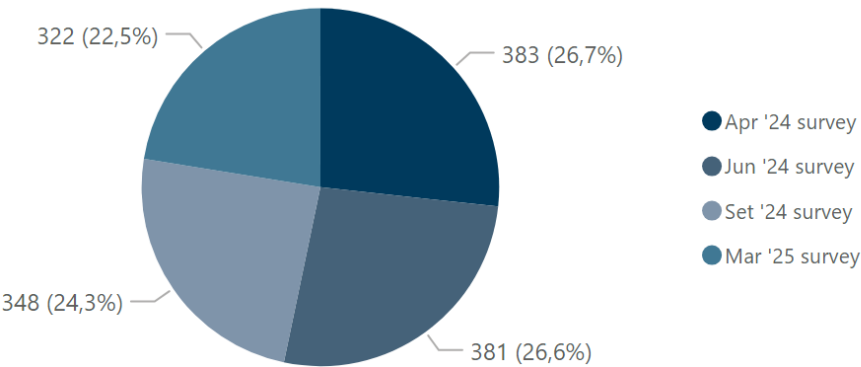
Respondents' countries (ten high-volume European source markets):

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

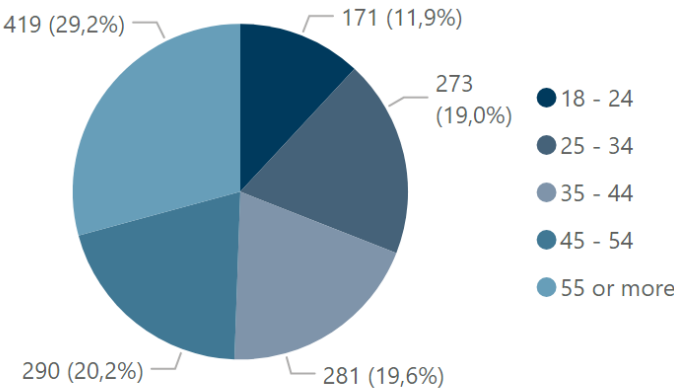
Research themes examined: Travellers' past preferences (1 question), travel attitudes, criteria and concerns (3 questions), behaviours for travelling next within Europe and changes in behaviours (18 questions)



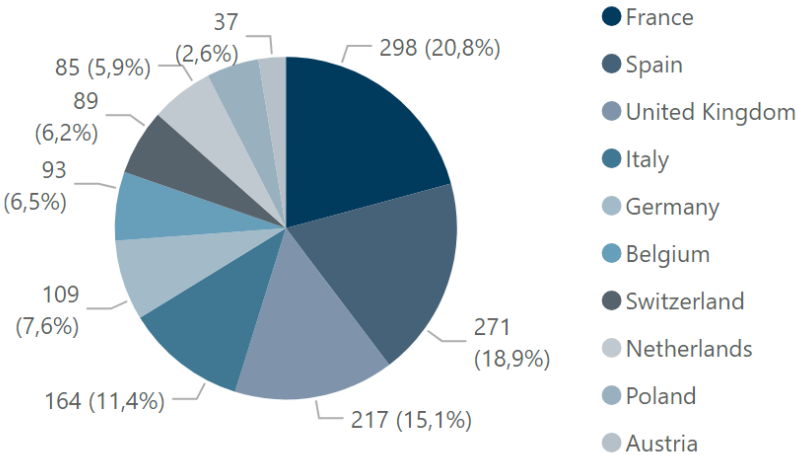
No. and % of respondents, by wave



No. and % of respondents, by age group



No. and % of respondents, by country





# 01 TRAVEL INTENTIONS

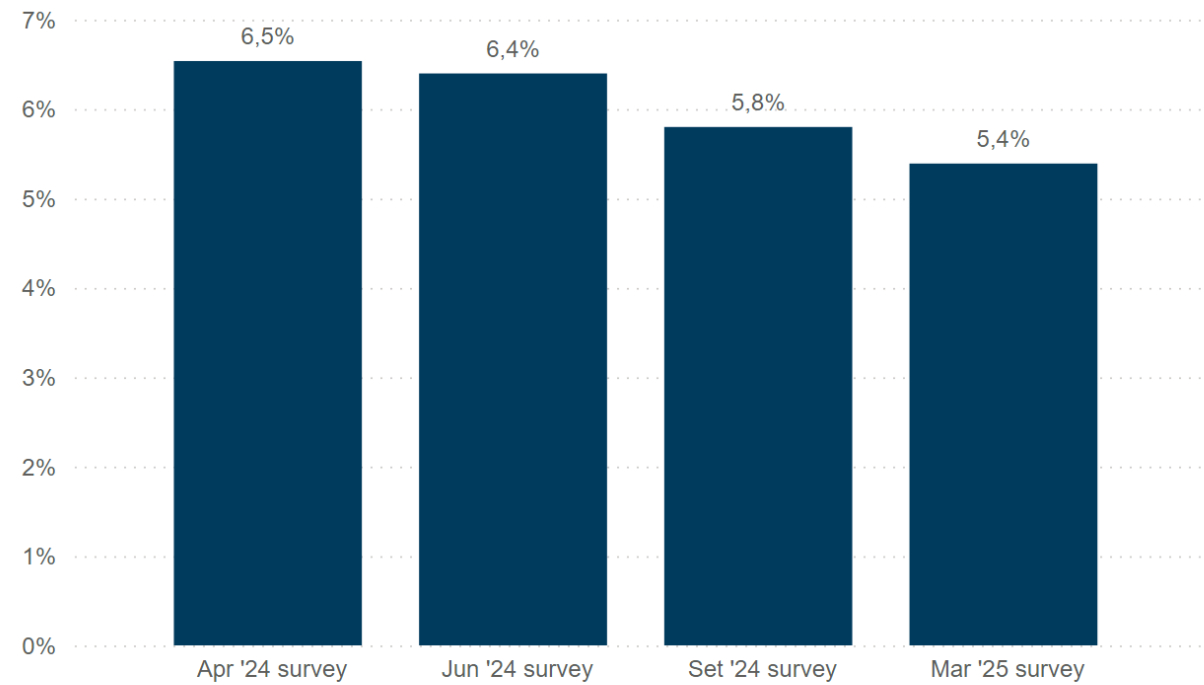
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Respondents that plan to travel to Portugal next

TRAVEL INTENTIONS



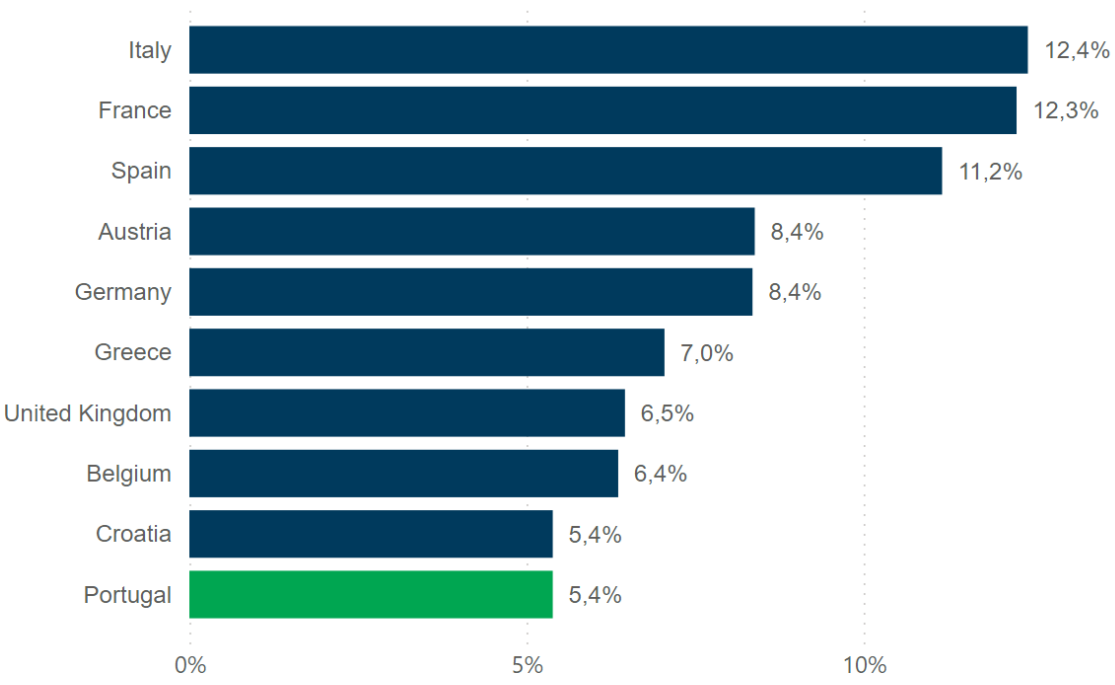
Intention to travel to Portugal next



No. of respondents:  
23789

Of all the inquired Europeans, around 5,4% plan to travel to Portugal in the coming 6 months, a decrease of 1,1% compared to the wave from last year.

Top 10 of intended countries to travel to next



No. of respondents:  
Mar '25 survey  
5974

In the most recent wave, Portugal stands as the 10th preferred destination for Europeans, inside Europe.

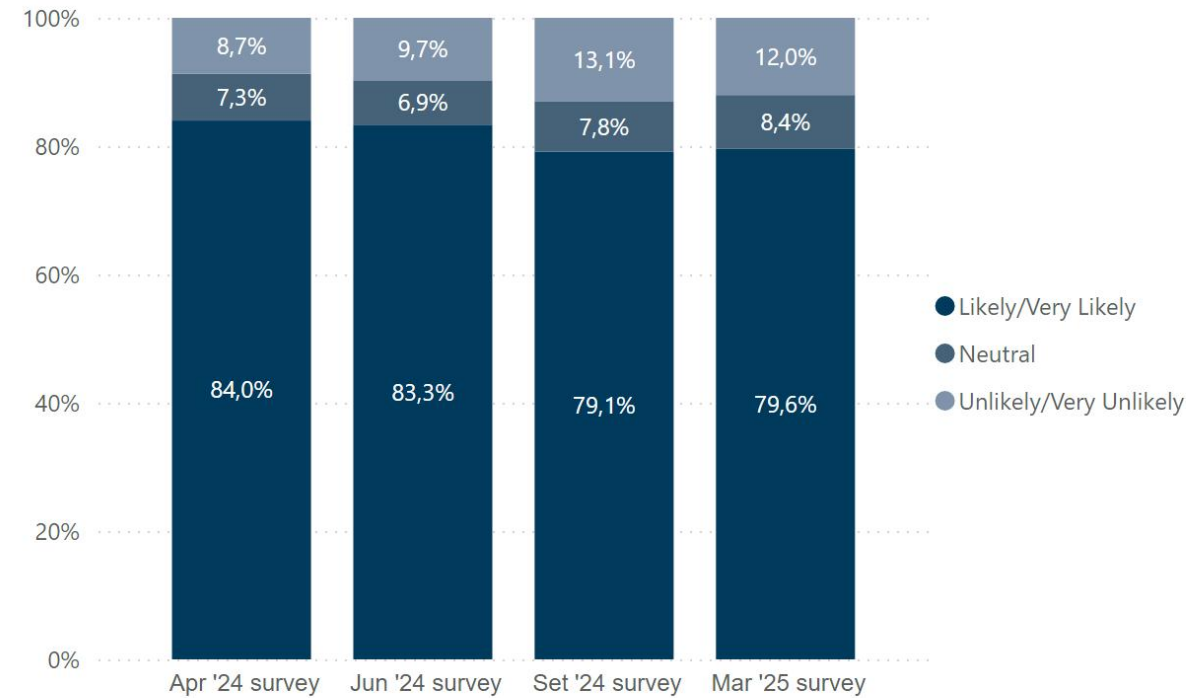
Question: To which country(ies) do you plan to travel next?



TRAVEL INTENTIONS



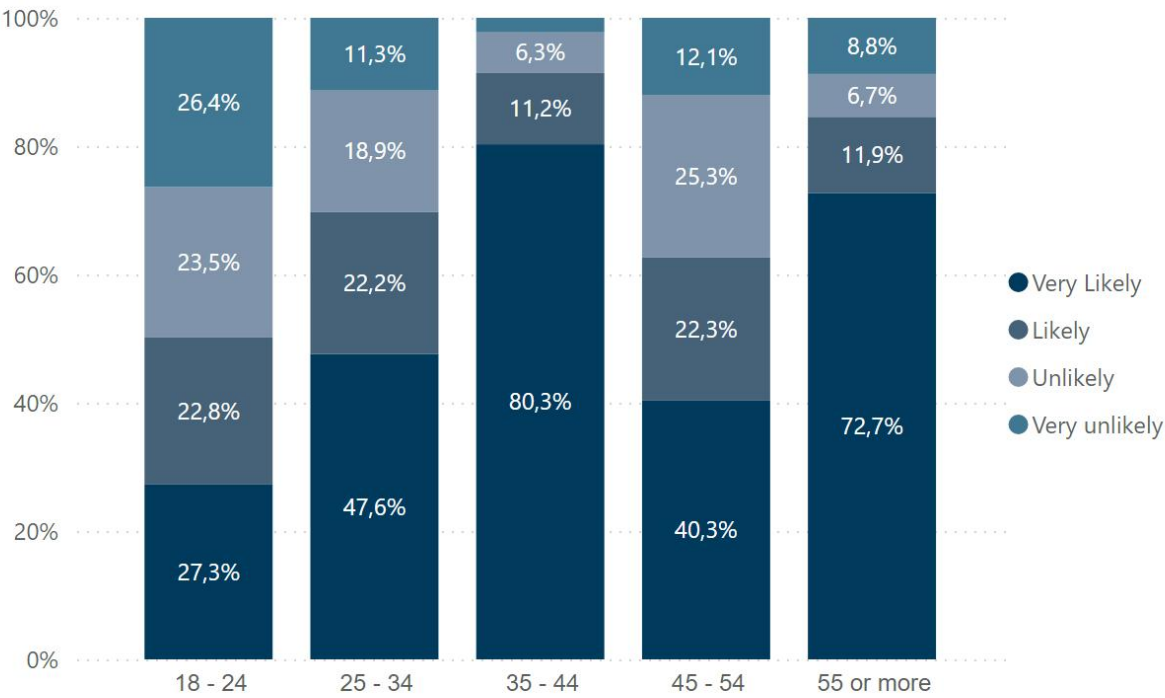
Intention to travel in the next 6 months



No. of respondents:  
1434

79,6% of Europeans that plan to travel to Portugal, plan doing so in the coming 6 months, an decrease of 4,4 p.p vs. last year wave.

Intention to travel in the next 6 months



No. of respondents:  
322

Intention to travel to Portugal in the next 6 months is very likely among the travellers in the age group of 25-34 than among the others, with than 74%.

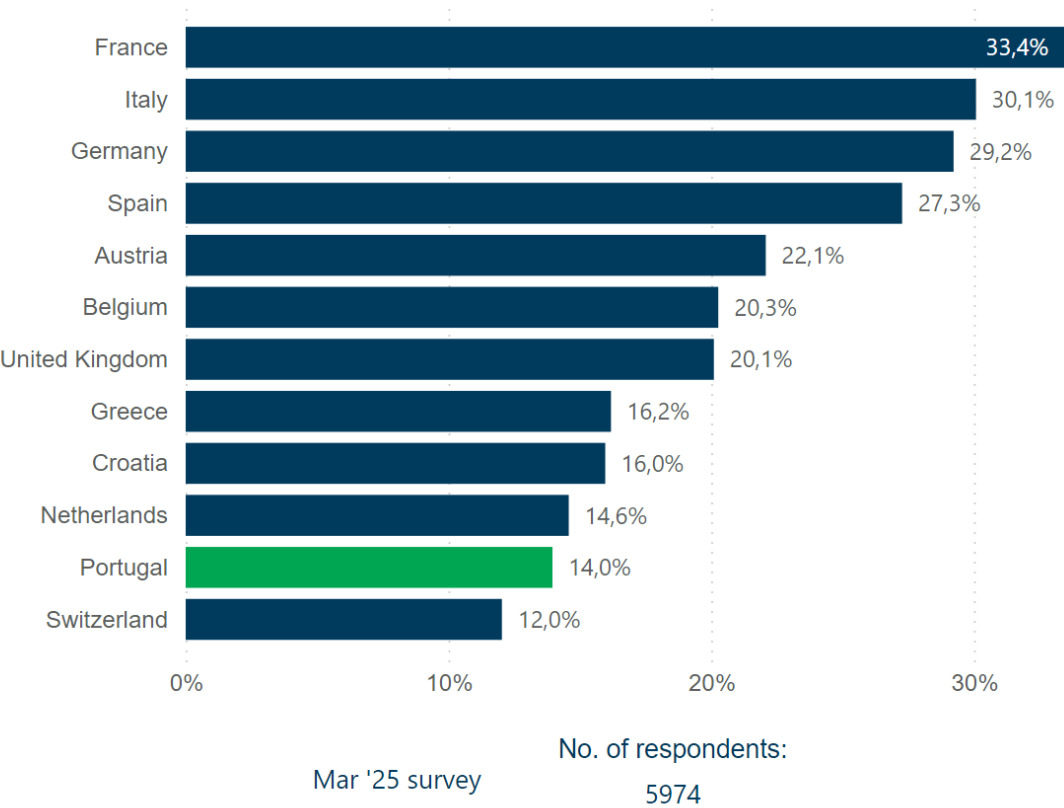
On the opposite end of the scale, travellers on the age group of 18-24 are the most unlikely of traveling in the next 6 months with almost 49,9% of unlikely or very unlikely answers.

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

TRAVEL INTENTIONS

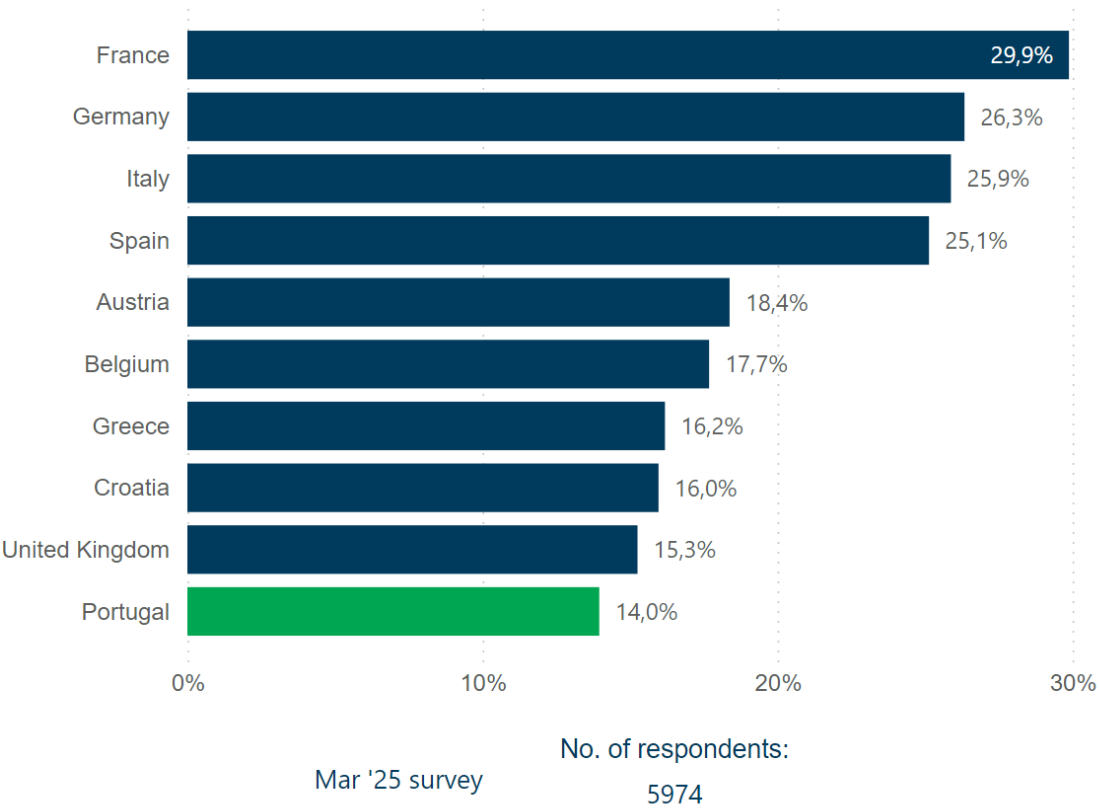


Top 12 countries visited in the past 3 years



In the past 3 years, 14,0% of European travellers have visited Portugal, making it the 11th preferred travel destination.

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



If domestic travel is removed than Portugal becomes the 10th preferred travel destination in the last 3 years.

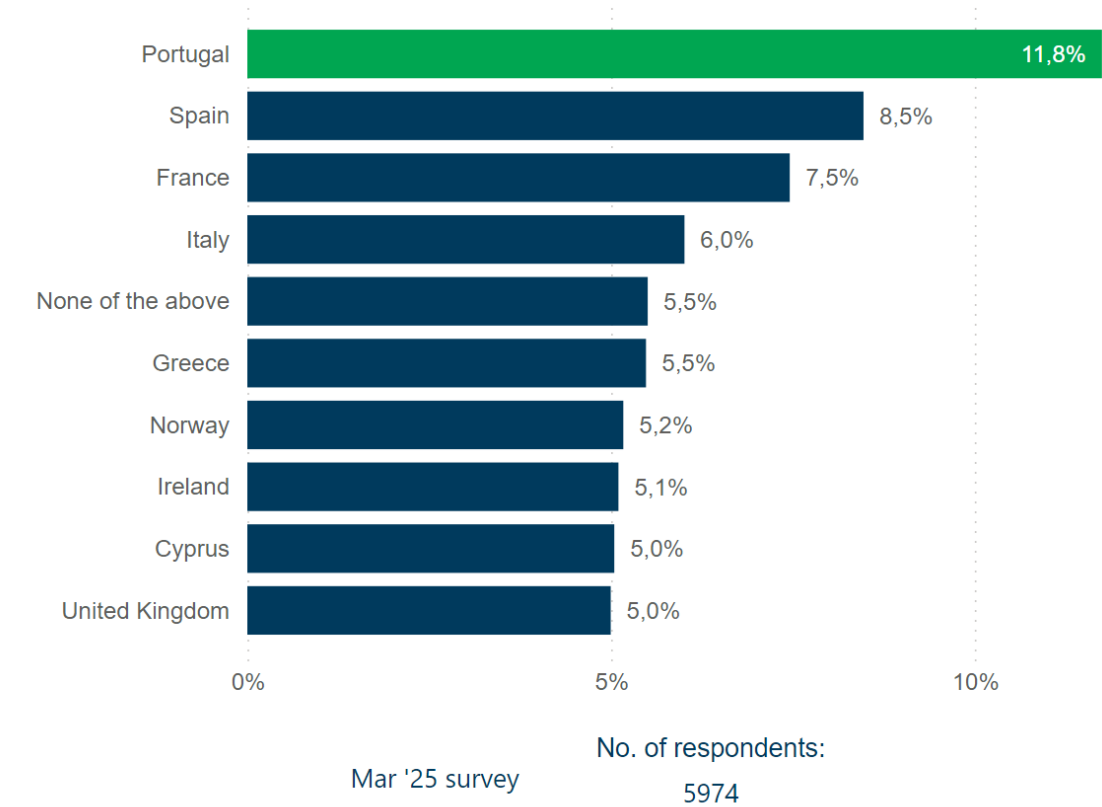
Question: Which European countries have you visited in the past 3 years?



TRAVEL INTENTIONS

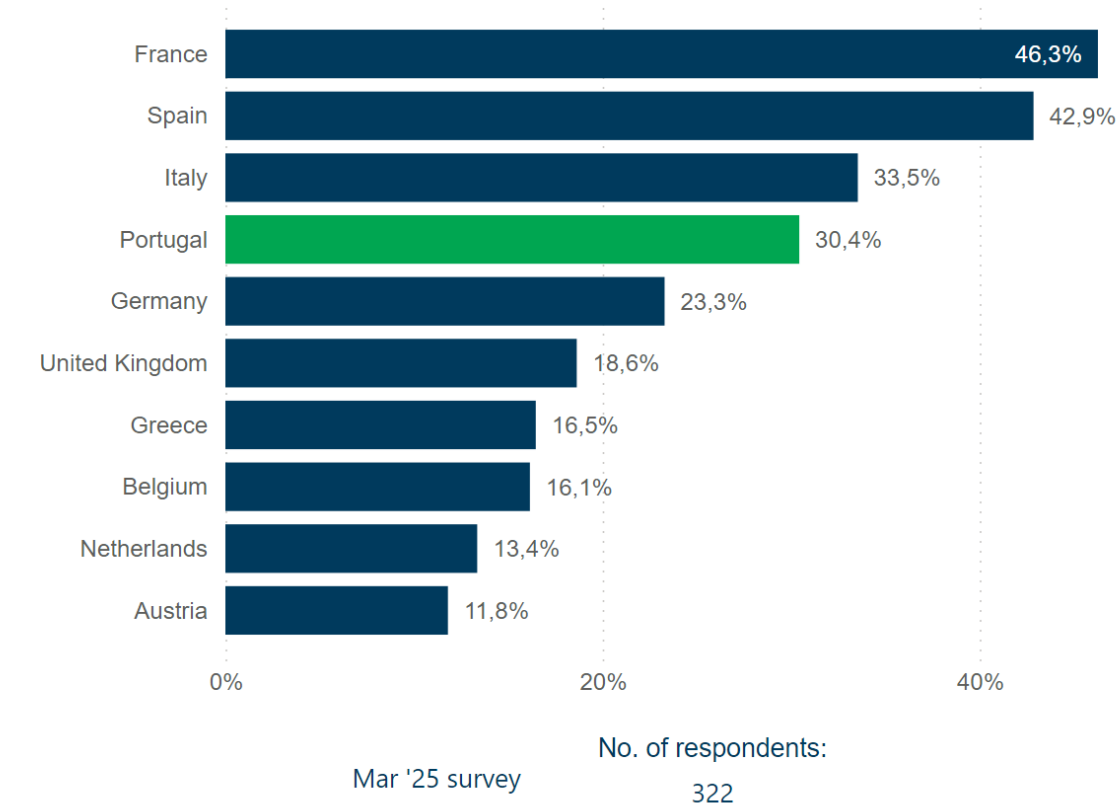


Percentage of those who visited to an european country than plan to visit Portugal



11,8% of Europeans that travelled to Portugal in the past 3 years plan to comeback in the near future. It's also noteworthy that 8,5% 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

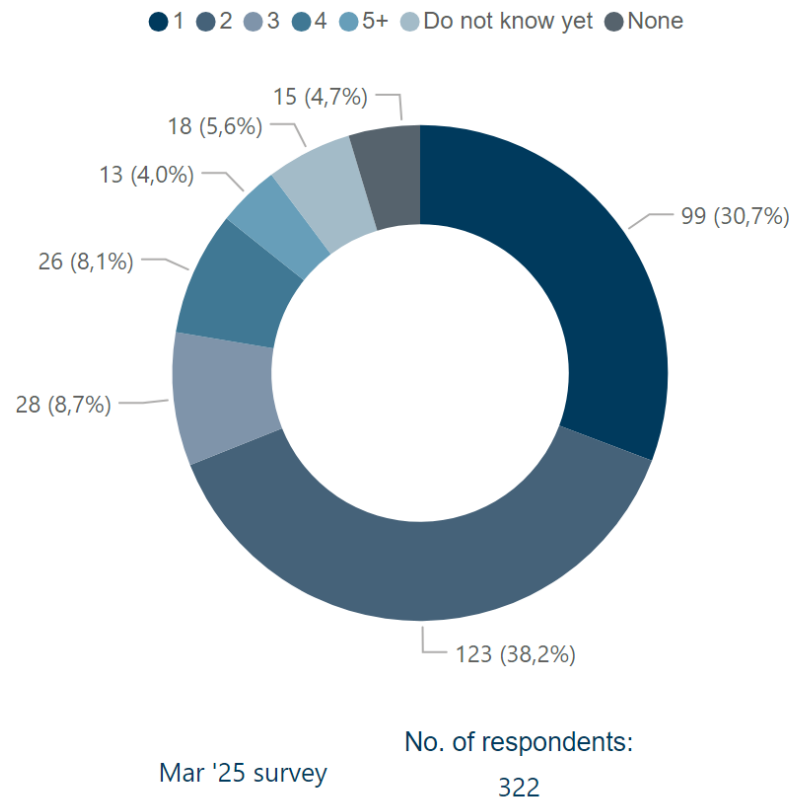


Of those that answered that planned to visit Portugal in the next 6 months, 46,3% have travelled to France recently. Other recent travels include Spain (42,9%) and Italy (33,5%). Also 30,4% have visited the country in the past 3 years.

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

TRAVEL INTENTIONS

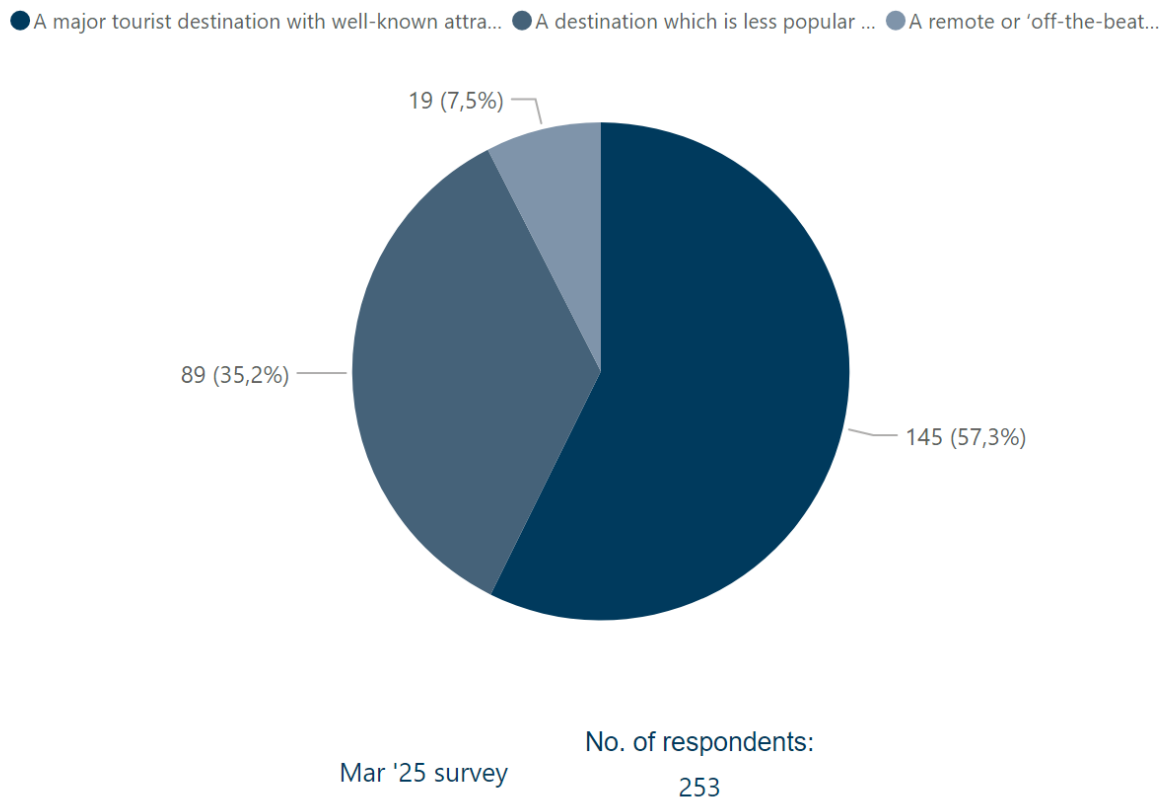
How many trips travellers plan to take in the next 6 months



68.9% 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?

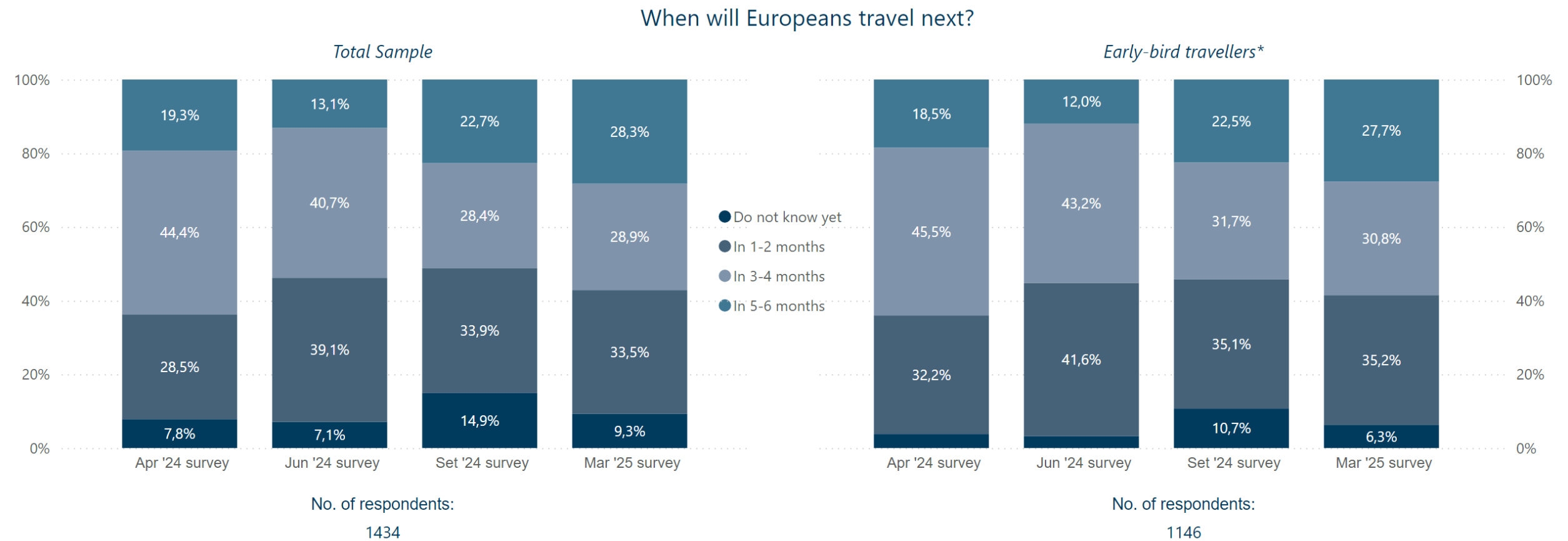
Respondents most likely to travel in the next 6 months, by type of traveller



57,3% of European Travellers have as their main travel preference ta major tourist destination with well-known attractions, while 35,2% want a destination that's less popular among tourists. Only 7,5% want to go somewhere remote or "off-the-beaten-path".

Question: Thinking of the next country you intend to visit, in what type of destination, within it, do you plan to spend most of your time?



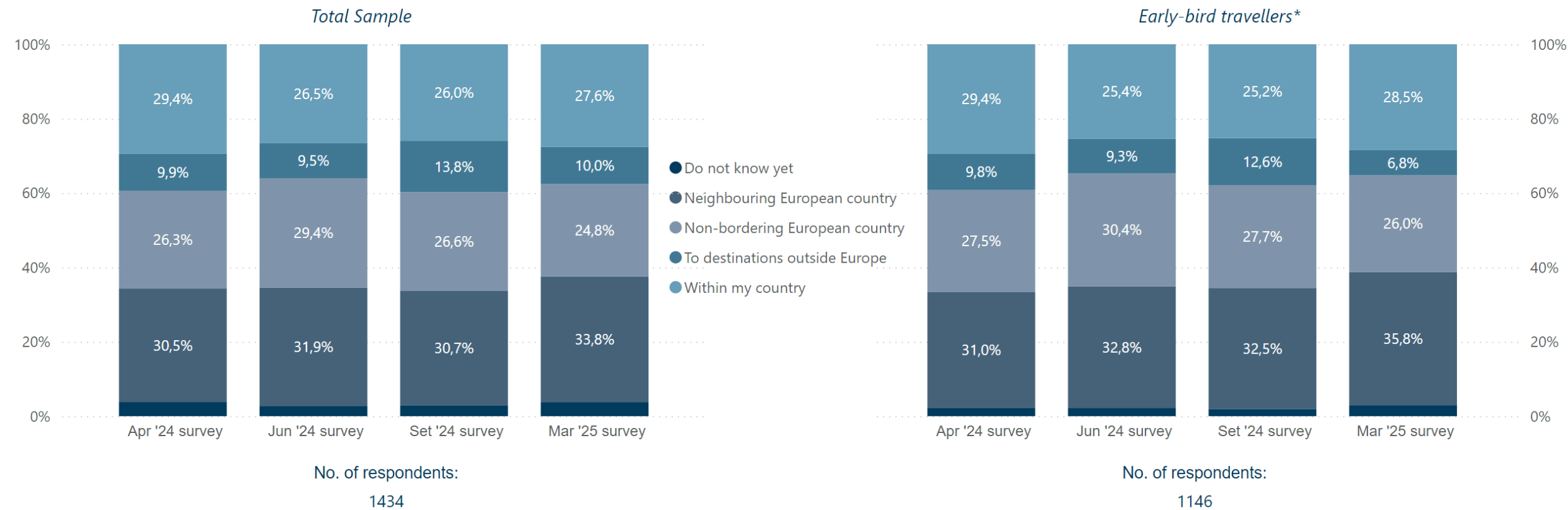


Compared to Apr 2024, travellers seems to be more uncertain of when they will travel next with 9,3% answering that they still don't know vs 7,8% last year. The same happens with the early-bird travellers. (6,3% Mar'25 vs 3,8% Apr'24)

\*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?



International travel within Europe remains respondents leading choice, a trend equally strong among "early-bird" travelers. Is also noteworthy that travelling outside of Europe is on this lowest value, for early-bird travellers, with 6,8% planning to travel outside Europe.

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

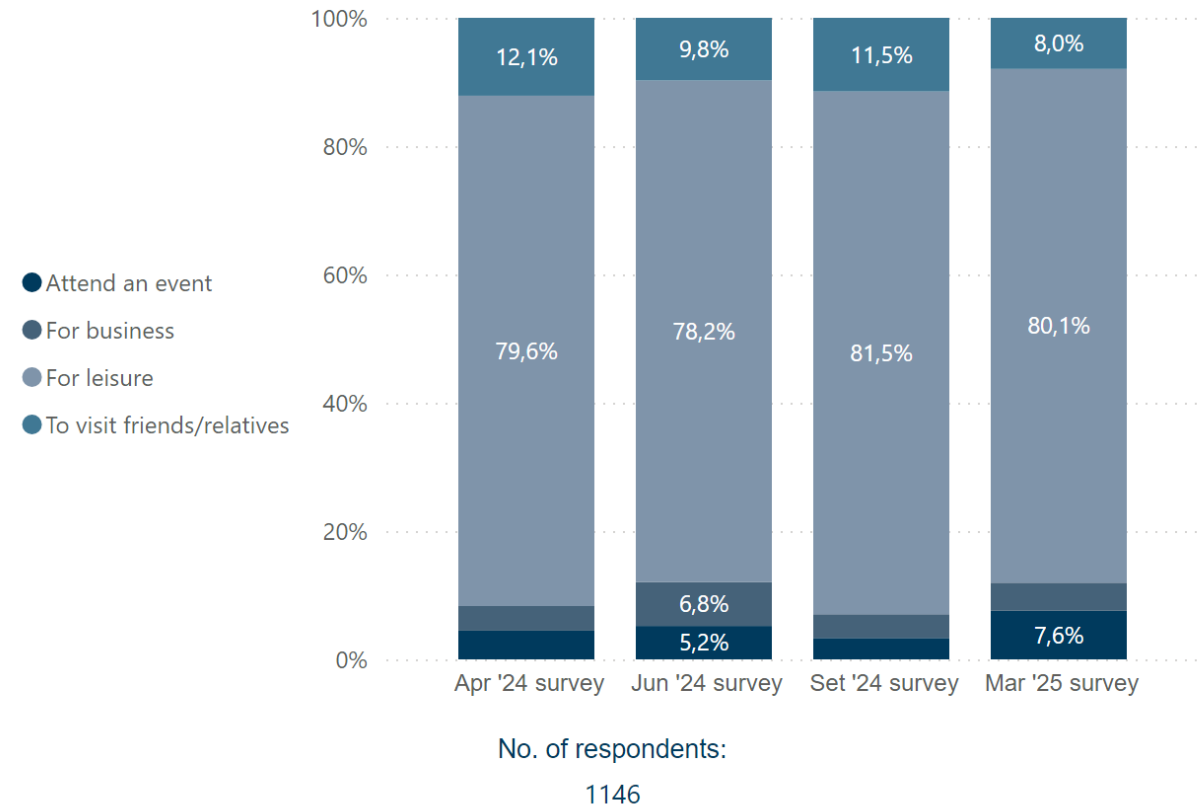
Question: When are you most likely to go on your next trip either in your country or within Europe?



TRAVEL INTENTIONS



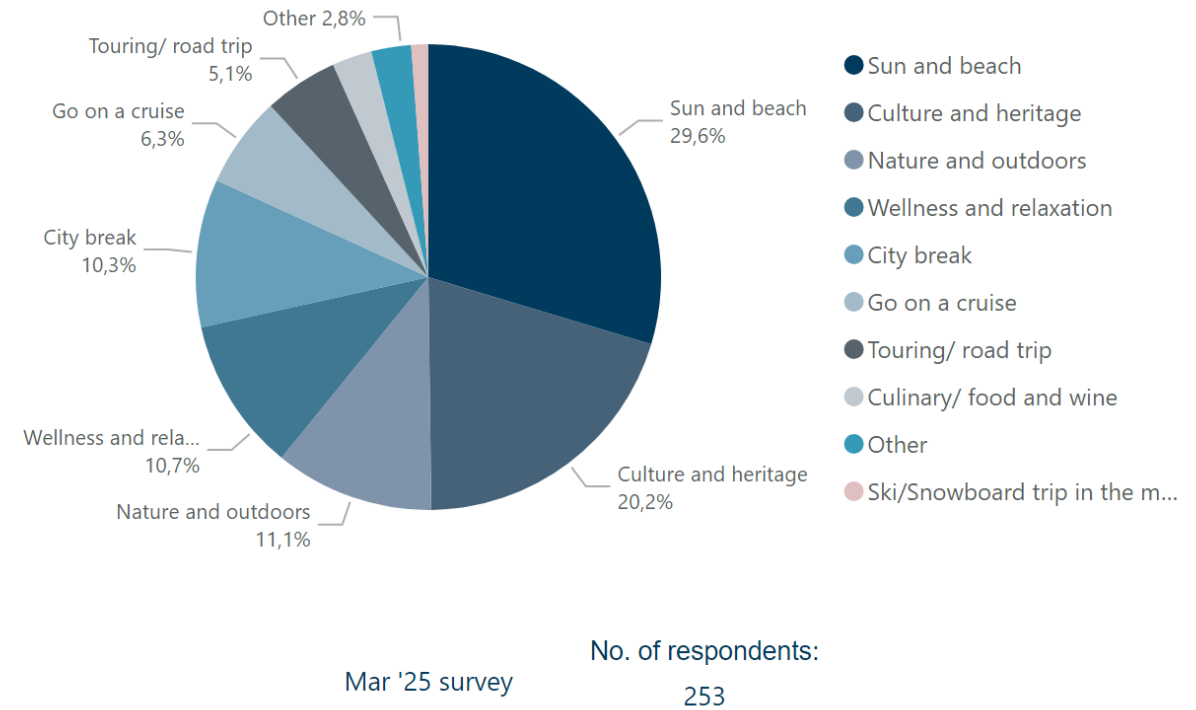
Purpose of travel for respondents most likely to travel in the next 6 months



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.

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

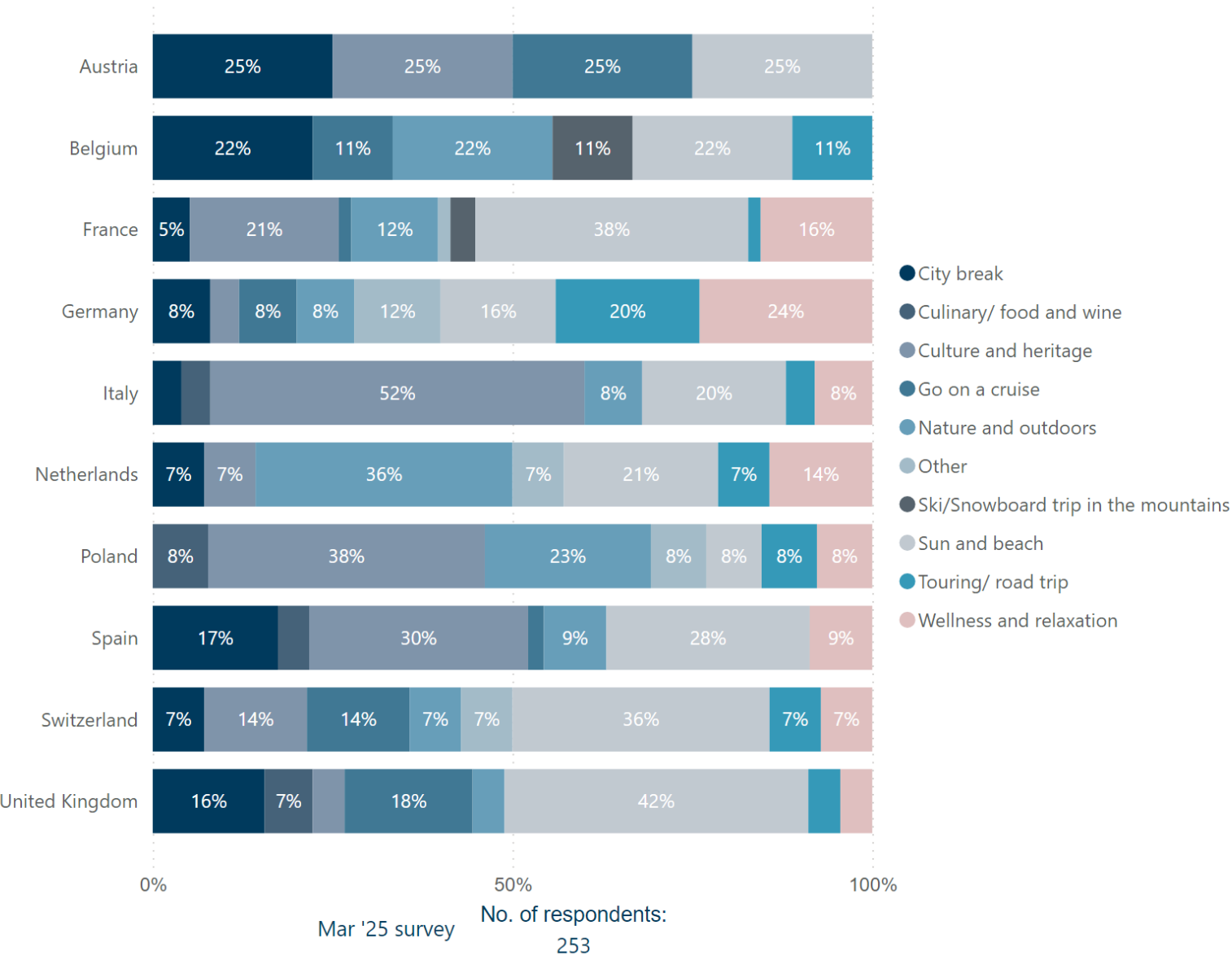
Preferred type of leisure trip for respondents most likely to travel in the next 6 months




29,6% of Europeans that are willing to travel to Portugal in the next 6 months will do it for sun and beach. Culture and Heritage (20,2%) and Nature and Outdoors (11,1%) are the other top motives.

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




Respondents from **United Kingdom, France and Switzerland** 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 France** have the highest % for Wellness and relaxation.



Nature and outdoors are mainly in demand for **Netherlands, Poland and Belgium** travellers.



City break are in demand for **Spain, Austria and Belgium** travellers.



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



# 02 TRAVEL PLANNING



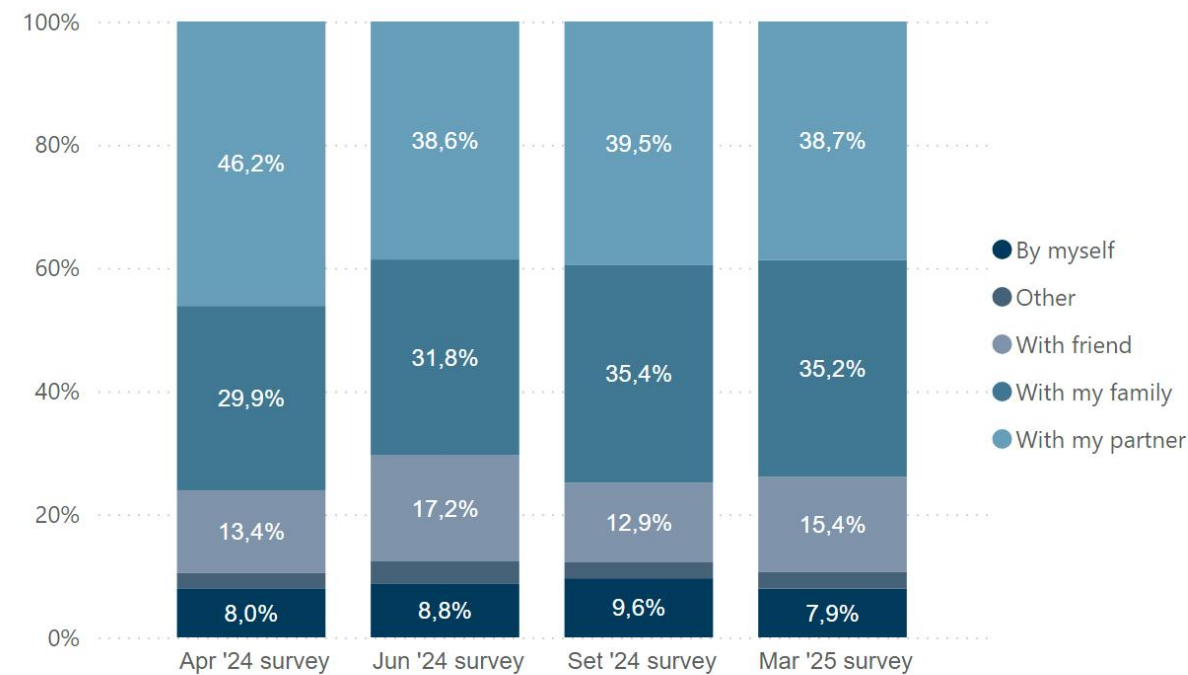
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Preferred travel companion for respondents who are most likely to travel in the next 6 months



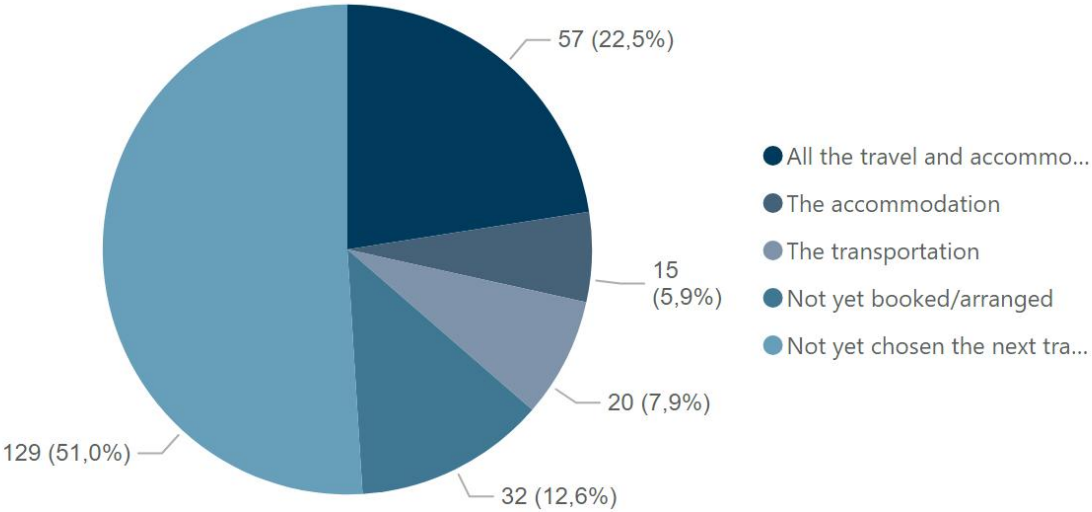
No. of respondents:  
1146

The main preference for travelling continue to be travelling with the partner followed by travelling with the family. Comparing with the Apr'24 wave, there was a increase 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



Mar '25 survey  
No. of respondents:  
253

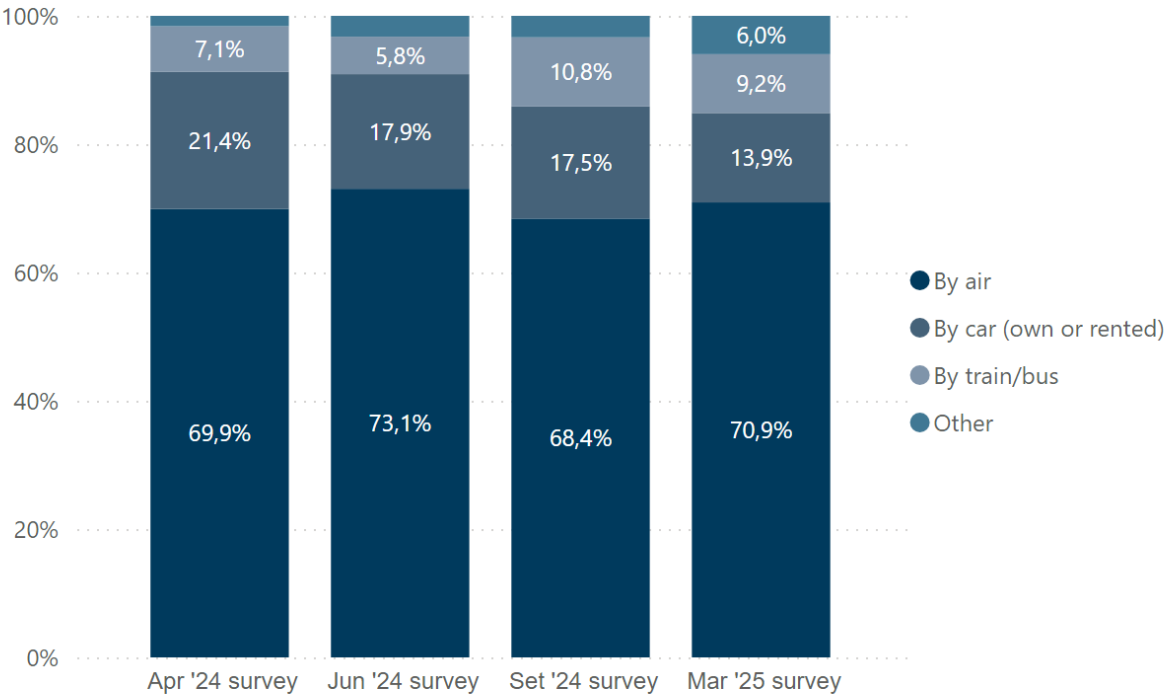
51% of the respondents haven't yet chosen the next travel while 22,5% have already planned all the travel and accommodation.

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





Modes of transport for respondents most likely to use during their next trip

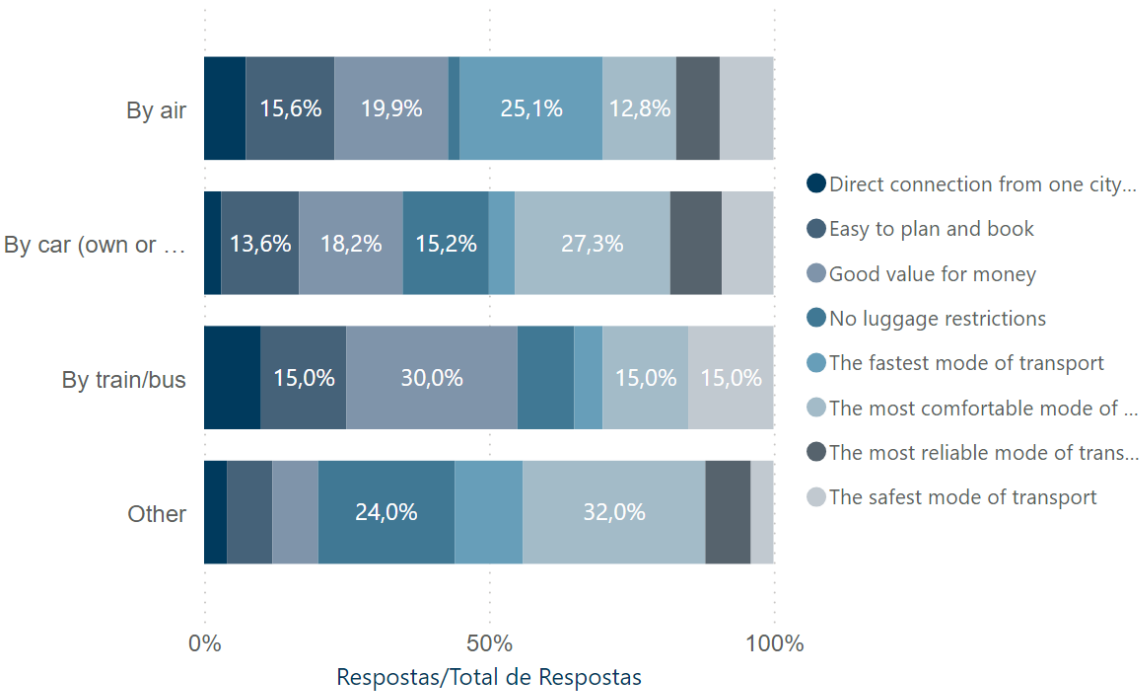


No. of respondents:  
1146

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

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

Most important factors on mode of transport decision



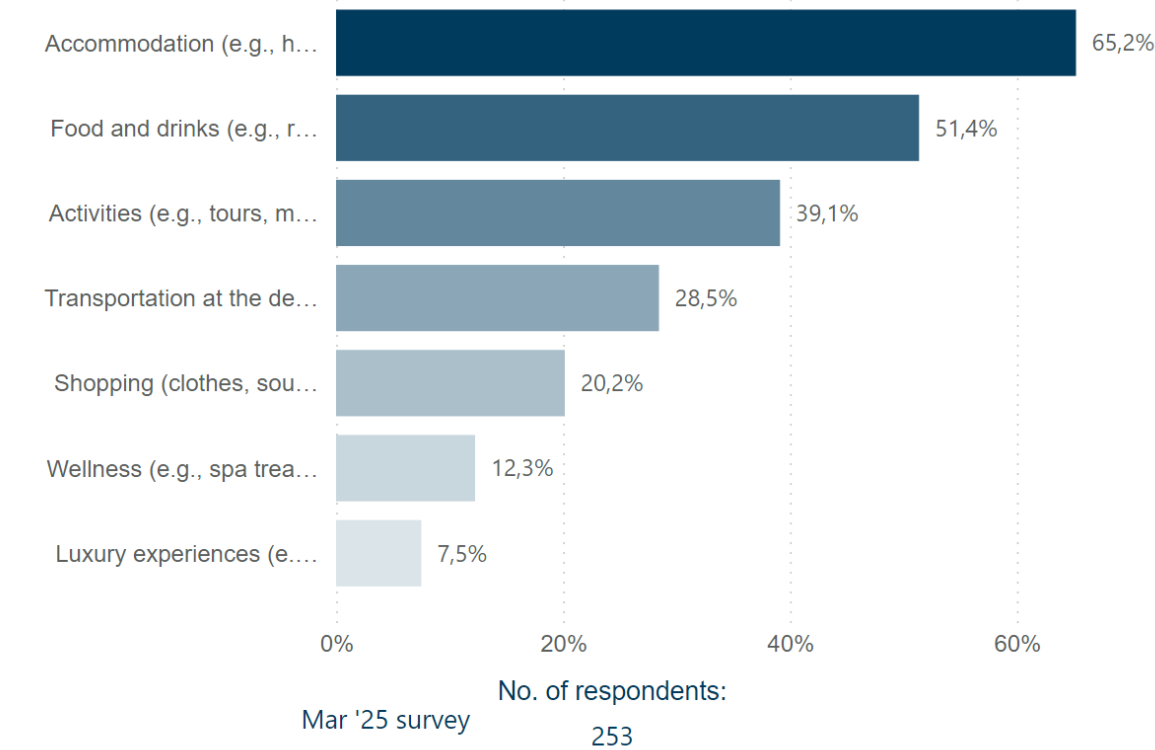
No. of respondents:  
253

Being the fastest mode of transport is the main factor for the travelers that choose to travel by air. Those who travel by car do so because they feel that it is the most comfortable, while those that opt for train or bus believe those offer best value for money.

**Question:** Which of the following factors play the most important role in your decision to use the selected mode of transport?



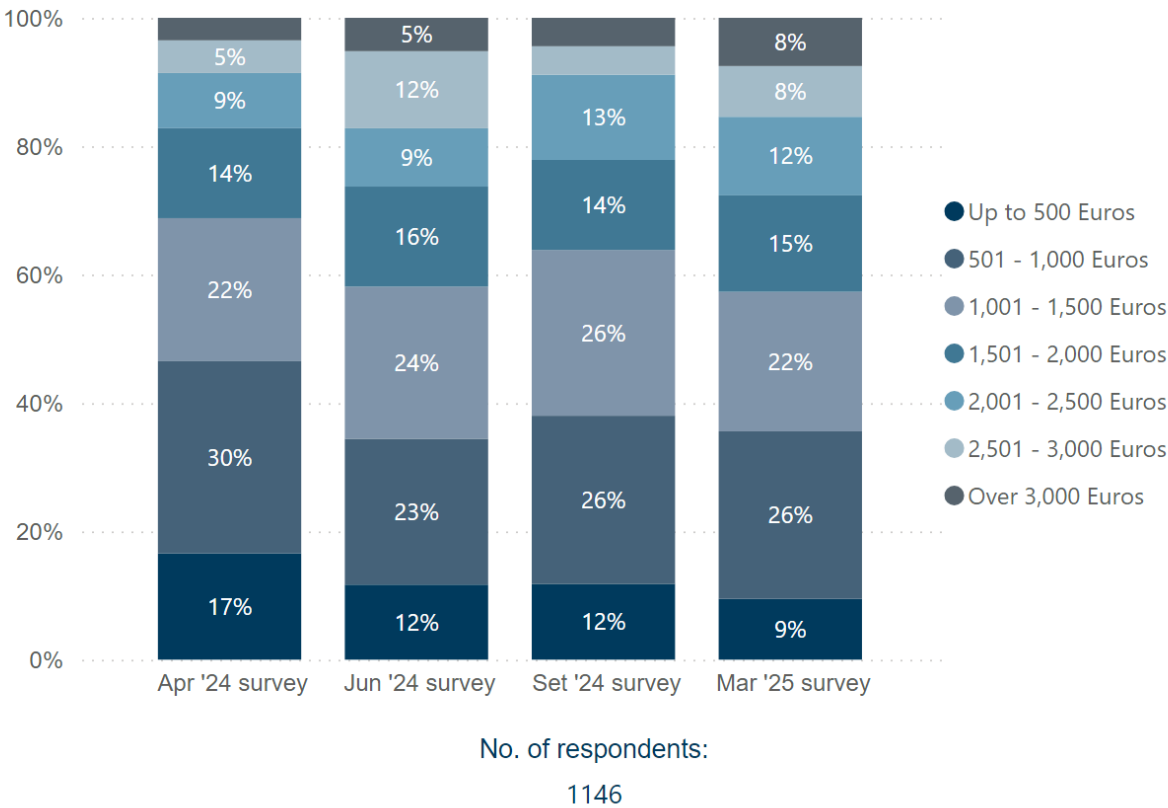
What categories do travelers expect to spend the most on



Travelers expect to spend the most on accommodation (65%), food and drinks (51%), and activities (39%) on their next trip to Europe.

**Question:** For your next trip to Europe, which of the following categories do you expect to spend the most on?  
(choose up to 3 answers)

Investing in the next overnight trip



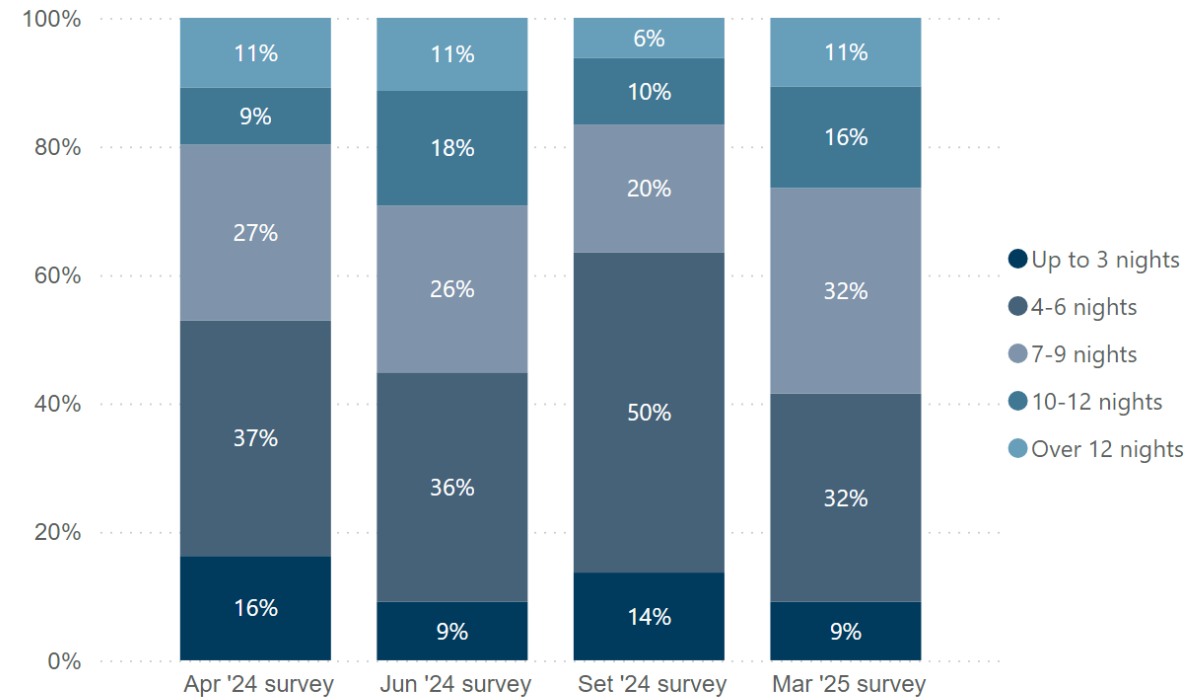
Comparing with the Apr'23 survey it there is a sharp reduction of travelers that expect to pay only up to 500€ (9% vs 17%) with a increase on those that expect to spend 2.500€ or more (15% vs 9%).

Despite this the main range of spending is still between 501€ to 1.000€ (26%) followed by the 1.001€ and 1.500€ range (22%),

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



Length of next overnight trip



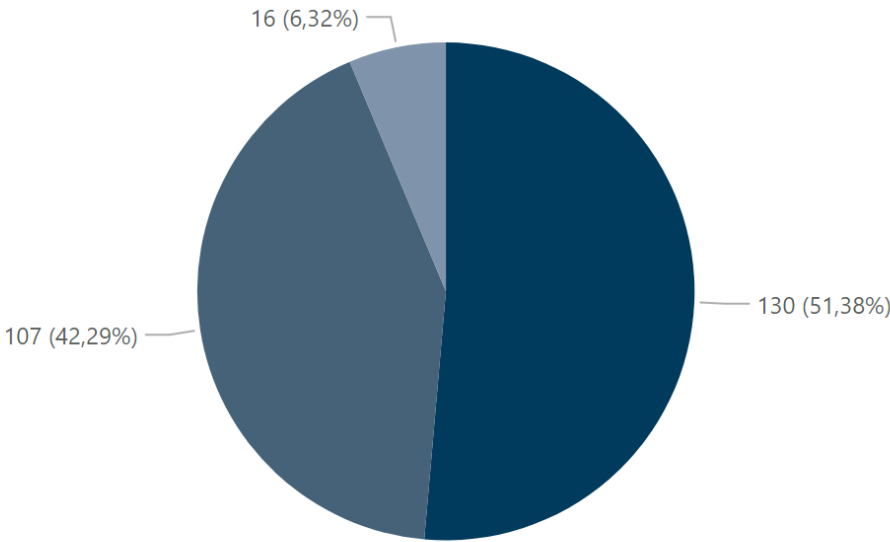
No. of respondents:  
1146

Those that expect to travel in the next 6 months want to so for a longer period of time, with the ranges up to 6 nights less representing than those between 7 to 12 nights for the first time (41% vs 48%).

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

Type of itinerary planed

● I will stay in one city/region for the entire trip (in ... ● I will visit multiple cities/regions wit... ● I will visit multiple countries

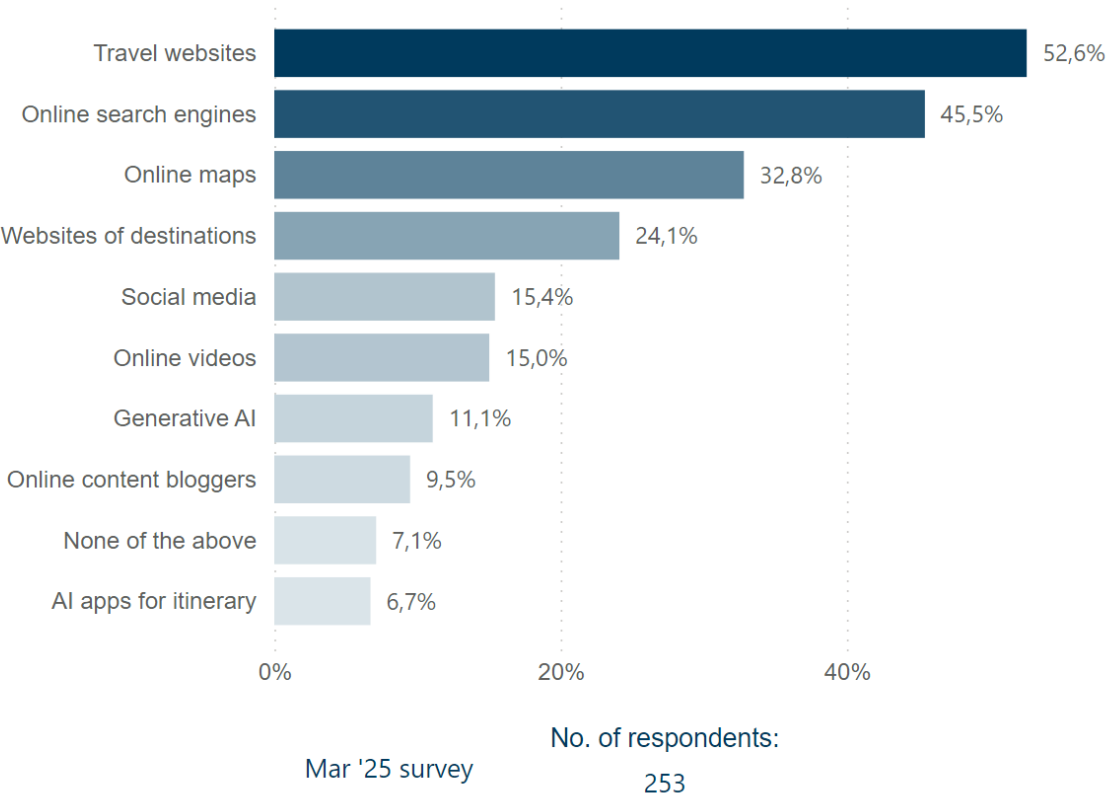


Mar '25 survey  
No. of respondents:  
253

Of those planning to travel in the next 6 month, only a small number plan to visit multiple countries (6%). The majority of travelers split between those that will stay in only one city or region for the entire trip (51%) and those that plan to visit multiple cities or regions within the same country (42%).

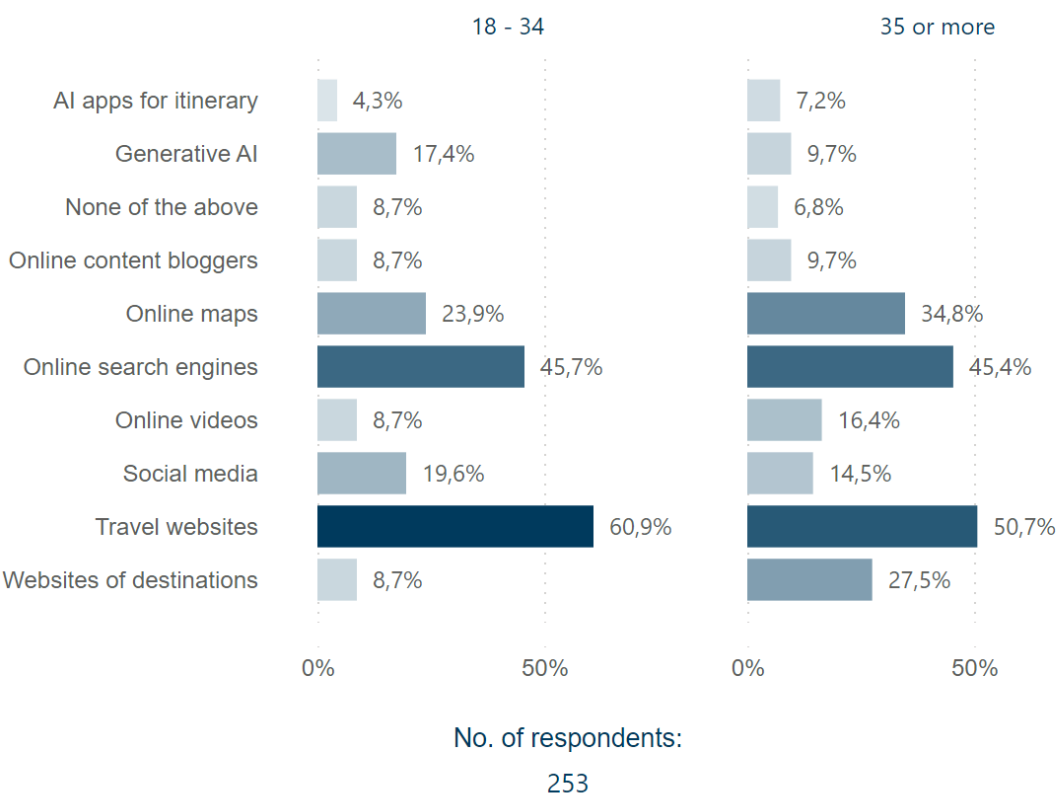
**Question:** What kind of itinerary do you plan for your next trip within Europe?

Digital tools used while planning the next trip



Of the digital tools used by travelers, 52,6% use travel websites, while 45,5% use online search engines as their main tool for plan their trip within Europe.

Digital tools used while planning the next trip



Comparing by age groups, the aged 35 or more use more online maps and the websites of destinations to plan their next trip, while the younger travelers use more travel websites and generative AI for their planning. Both age groups use online search engines to a similar extent.

Question: Which digital tools have you used (or will use) to plan your trip within Europe in the next 6 months? (select up to 3 answers)



# 03 TRAVEL CONCERNS



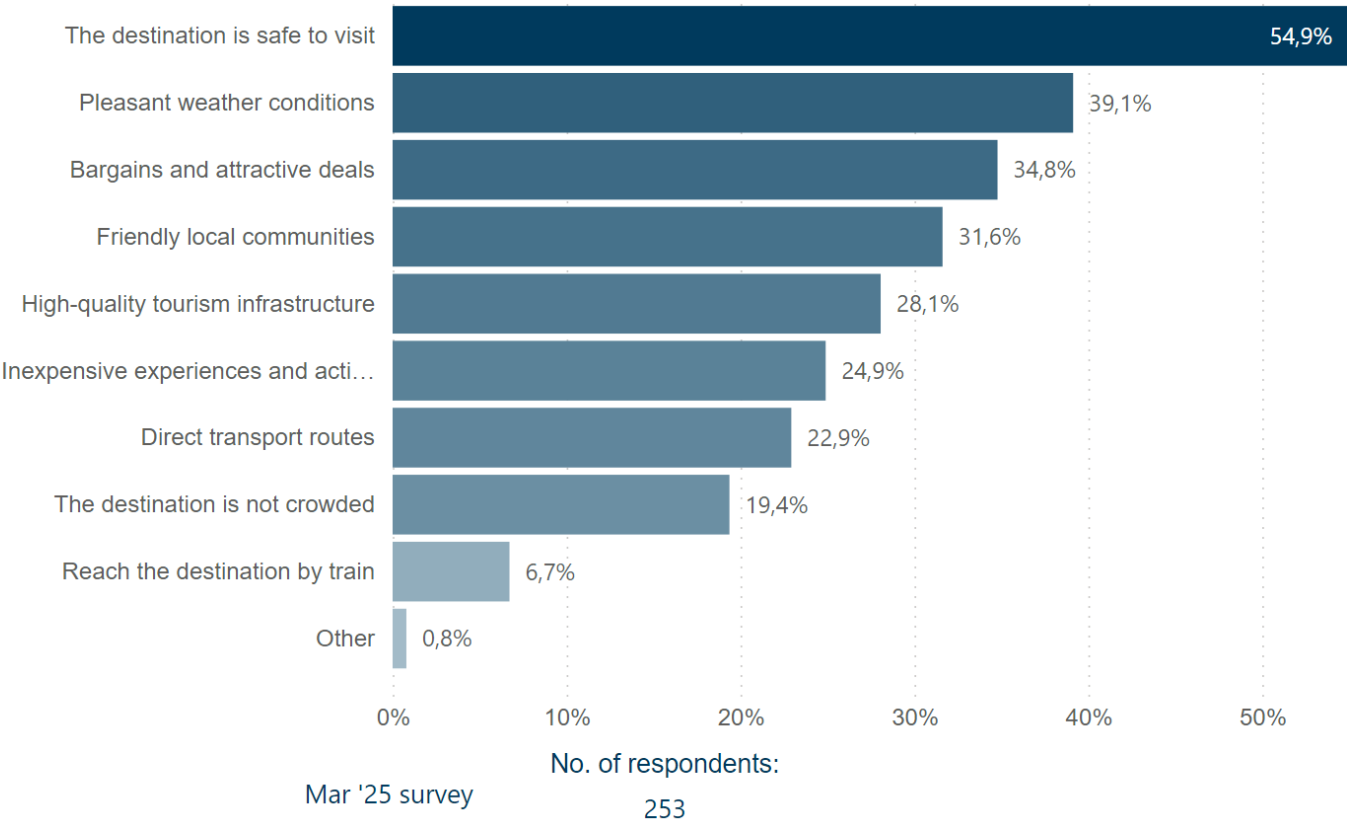
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Respondents that plan to travel to Portugal next





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

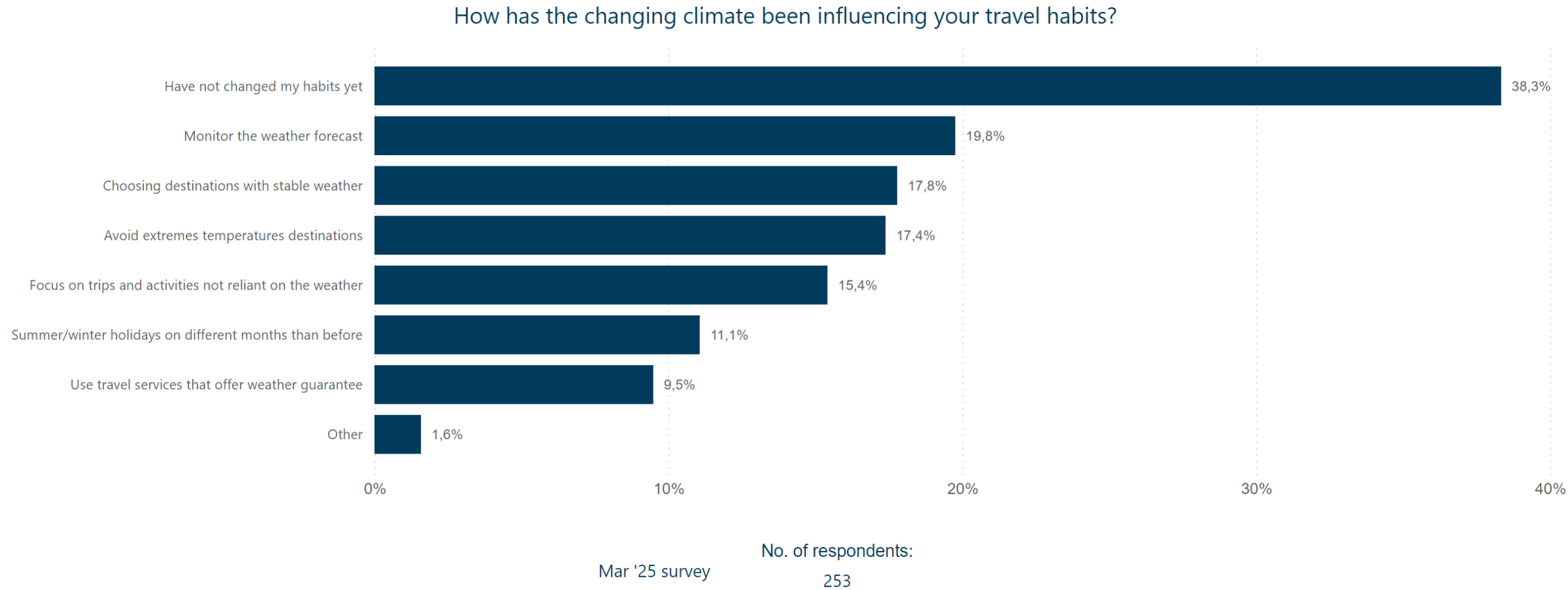


**Destination safety** was the most selected one in this wave, being consider the most important criteria by more than half of the travelers.

Having **pleasant weather conditions** or getting **bargains and attractive deals** were the other on the top 3 criteria, with 39,1% and 34,8% 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)



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.

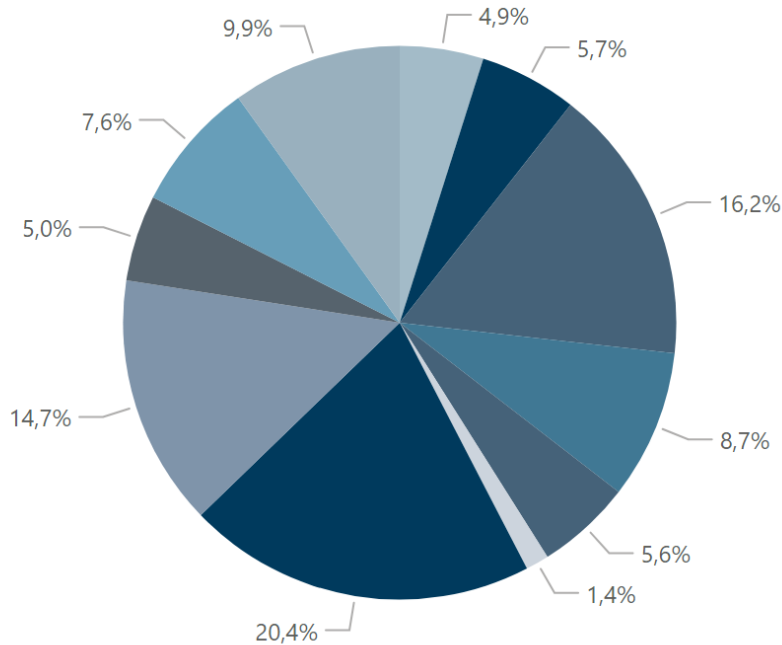
**Question:** How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) been influencing your travel habits? (multiple choice: up to 2 answers)

TRAVEL CONCERNS



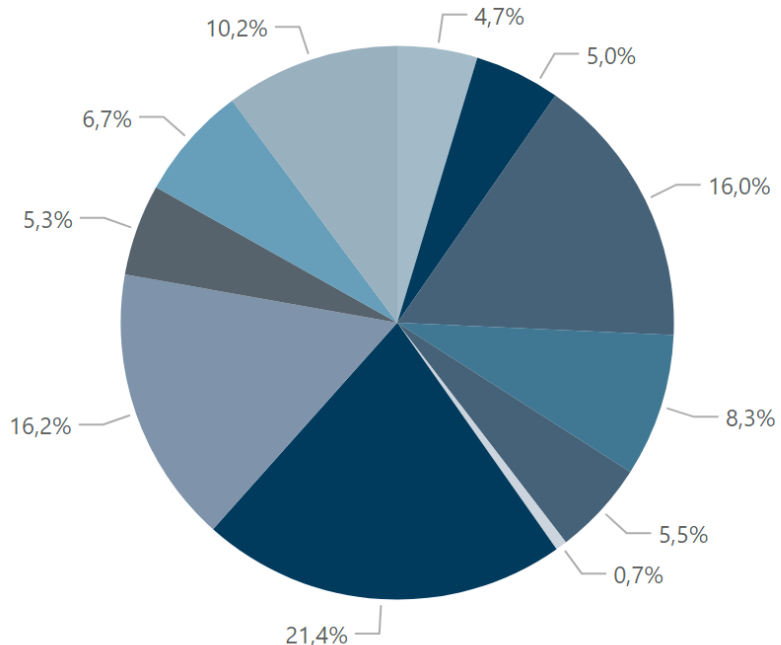
Leading concerns  
Total sample vs. early-bird travellers\*

- Becoming ill during my trip
- Booking and cancellation policies
- Disruptions in transport options
- Economic situation and personal finances
- Extreme weather
- Local demonstrations and protests agai...
- 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:  
322

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



No. of respondents:  
253

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.

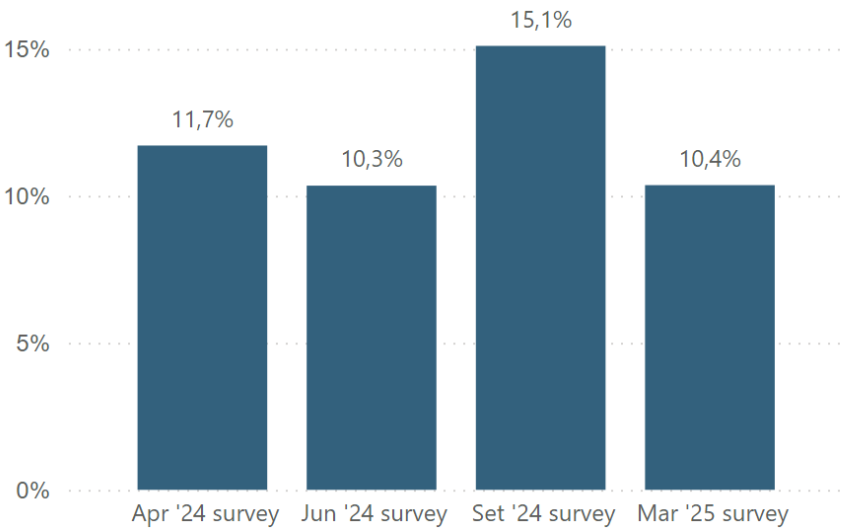
Question: What currently concerns you the most about travelling within Europe?



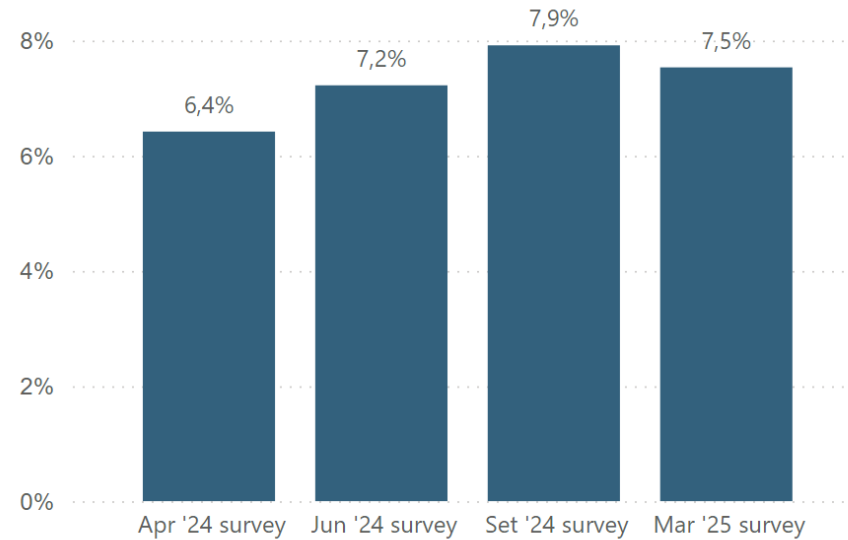
TRAVEL CONCERNS



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



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



THE LEVEL OF UNCERTAINTY FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL



**10,4%** of respondents state that **they do not know when they will travel next**



**16,6%** of respondents **haven't yet planed anything** including where they will travel next.

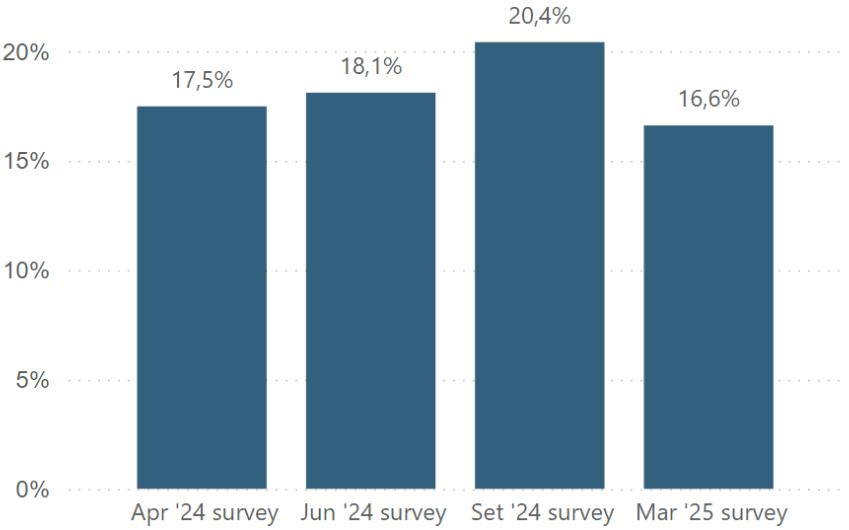


**7,5%** of respondents state that **they do not k where they intend to travel** to in the next 6 months

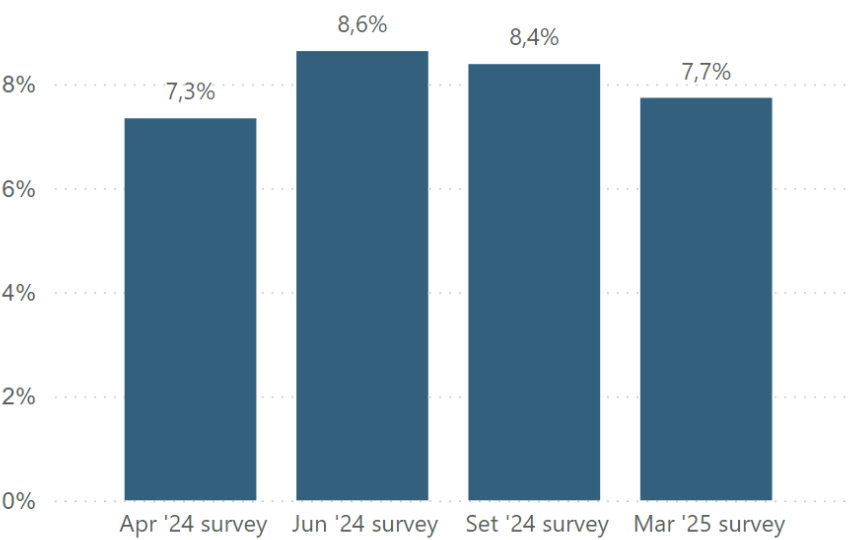
**7,7%** of respondents **don't know how many trips** they will take in the next 6 months within Europe

No. of respondents (Total):  
23.789

% of respondents that haven't planned anything



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



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## Credits

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**Author:** Knowledge Management  
Business Intelligence

**Source:** European Travel Commission (ETC)



**Information Classification:** External Use

**Report Date:** may 2025

