



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 **13th 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:

- Travel sentiment remains strong, with **70% of surveyed Europeans planning to travel in the next 6 months**, out of which 52% intend to travel more than once. **75% of Europeans aged 45-54 are eager to take a trip over the next six months**, compared to 58% among Europeans aged 18-24.

- **Only 9% of travel-ready Europeans are concerned by the war in Ukraine (-6%, compared to May 2022)**, while the war has had no effect on the travel plans of 52% of respondents (+8% compared to May 2022).

- **62% of Europeans intending to travel will visit another European country** - the highest level recorded since September 2020 and a 7% increase compared to a year ago.

- Europeans' greatest travel desires are to **enjoy nature (18%)**, **taste the local cuisine (17%)** and **experience the local culture (16%)**. **Leisure trips remain the leading travel choice (72%)**, while only 5% of respondents plan a business trip.

- **Most often, Europeans prefer travelling with a partner (38%) or family (37%)**.
- Despite operational difficulties during the summer, **air travel is still the preferred transportation mode for over half of travel-ready Europeans (51%)**, while preference for train/bus travel (12%) has grown by 3% compared to September 2021.

- **63% of Europeans are planning trips of up to six nights. Travellers' most common budget remains at 500-1,000 euros (32%)**, while the share of Europeans planning to spend up to 500 euros (21%) is up by 4% compared to May 2022.

- **The share of Europeans who have fully/partly booked their trip (45%) drops by 8%**. This decline is a trend reversal from previous research waves and can potentially be explained by increased economic concerns leading to a desire for last-minute bookings.

- **Good weather (18%), attractive deals (17%) and less crowded places (11%)** remain Europeans' leading criteria for selecting a travel destination.

- **Financial issues are the leading concern for 2 in 5 Europeans (+10% since May 2022)**: 23% of respondents are concerned by the rising travel costs and 17% by personal finances.

- **The effect of COVID-19 on Europeans' travel behaviour drops to its lowest point since September 2020**: 41% of respondents report no change in their travel plans due to the pandemic (+7% compared to May 2022 and +21% compared to September 2021).

METHODOLOGICAL NOTES



Online market research. Survey participants are consumers with at least 2 overnight trips during the last three years (2019-2021).

Distribution/ data collection period:

Soma de Wave	Surveys dates	Soma de Sample
6	5 - 19 February 2021	5.837
7	19 - 29 May 2021	5.921
8	13 - 23 July 2021	5.778
9	10-18 September 2021	5.769
10	Dec '21 survey	6.002
11	Mar'22 survey	5.998
12	May'22 Survey	6.005
13	Set '22 survey	5.988

The present report is about data (wave 9 to wave 13) from above respondents that selected **Portugal** in the question **'To which country(ies) do you plan to travel next?'**

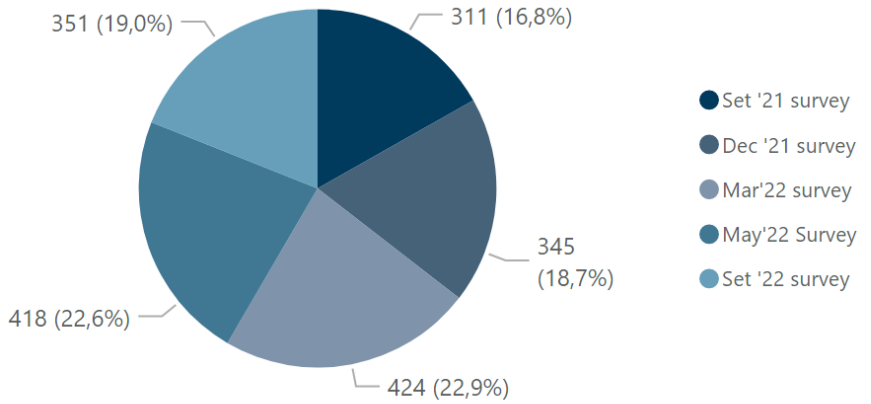
Respondents' countries (ten high-volume European source markets):
 Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria

Research themes examined: Travel personas (1 question), Travel concerns and COVID-19 impact on travel (9 questions) and Travel intentions, preferences and trip planning (12 questions)

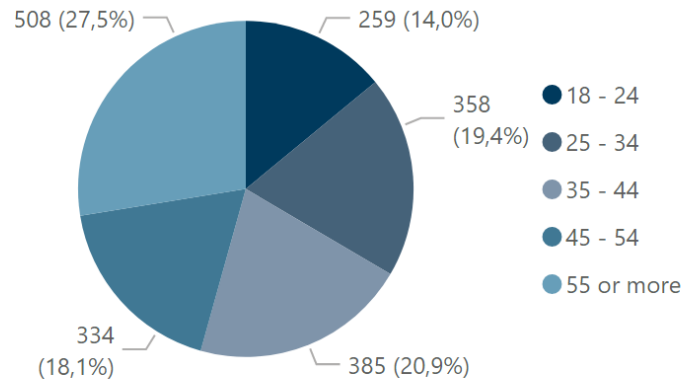
Respondents that plan to travel to Portugal next, by country



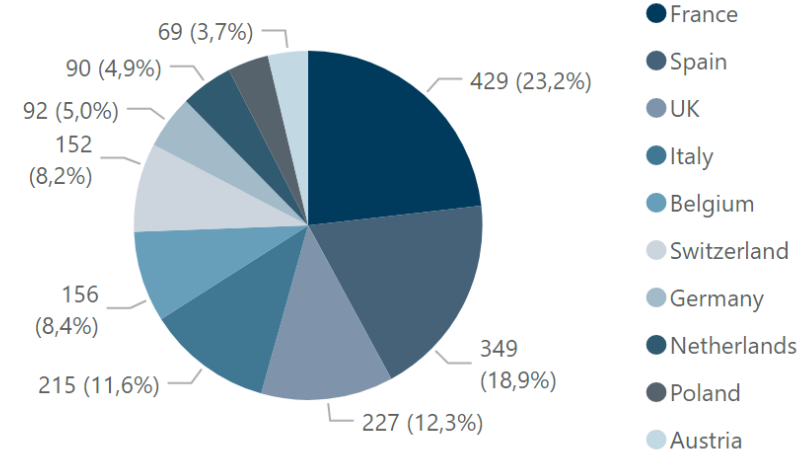
No. and % of respondents, by wave



No. and % of respondents, by age group



No. and % of respondents, by country



01 TRAVEL INTENTIONS

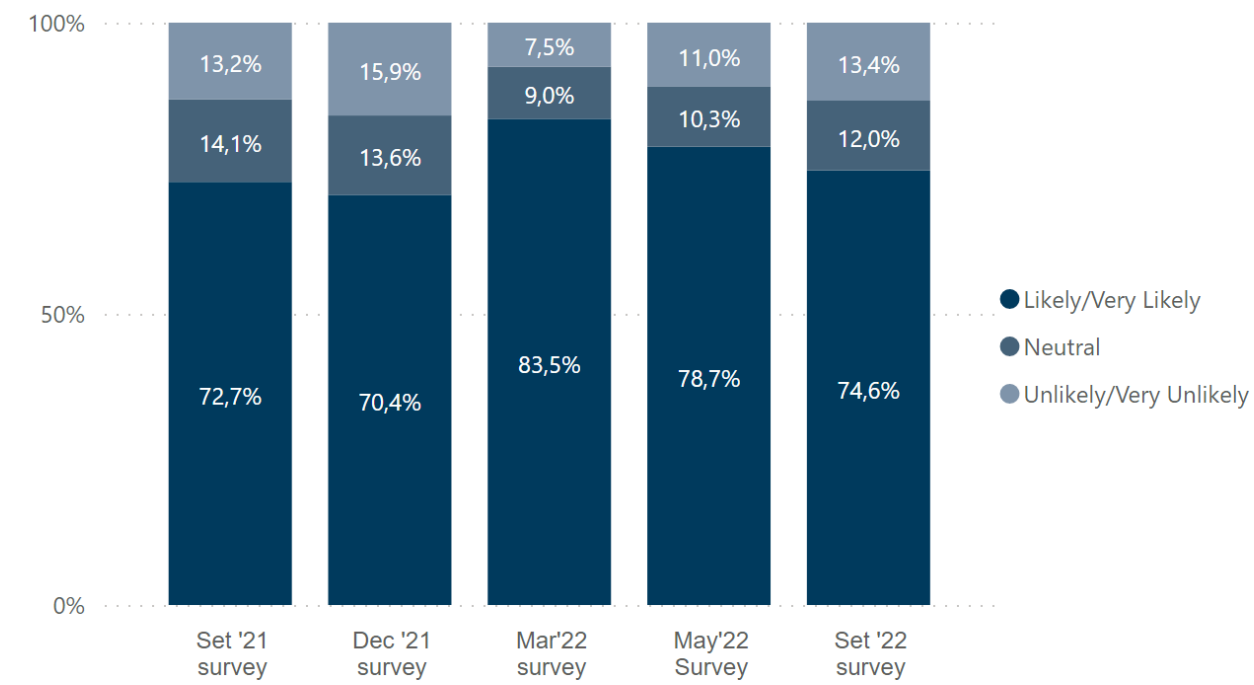


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Respondents that plan to travel to Portugal next

TRAVEL INTENTIONS

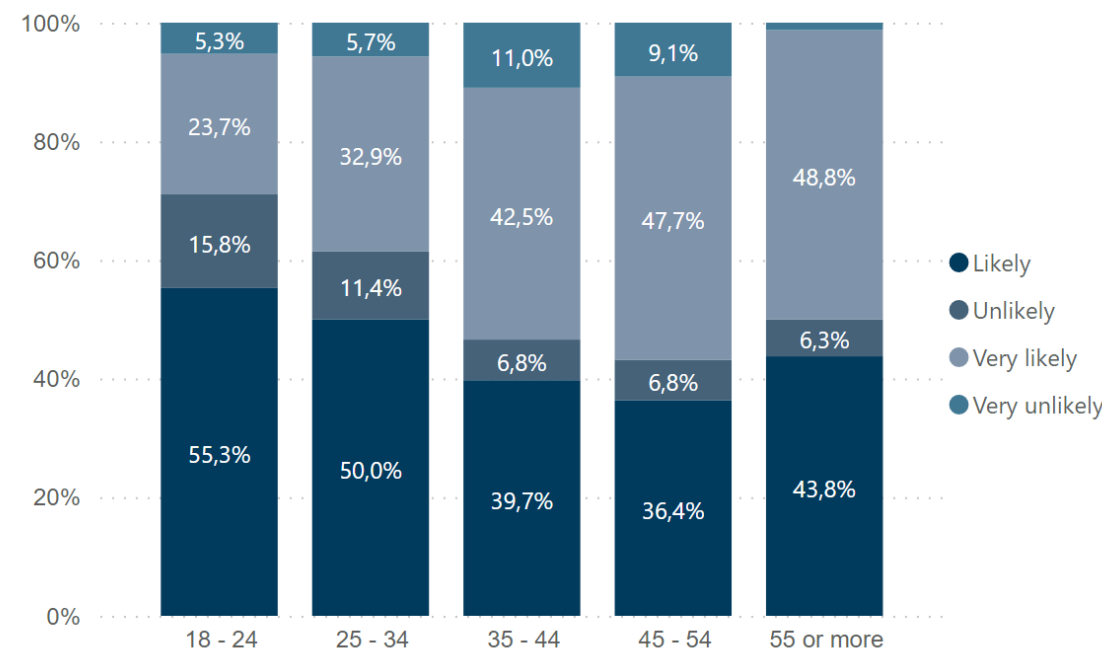
Intention to travel in the next 6 months



No. of respondents:
1849

74,6% of Europeans plan to travel to Portugal in the coming 6 months. This % is smaller than the result of the previous wave.

Intention to travel in the next 6 months, by age group



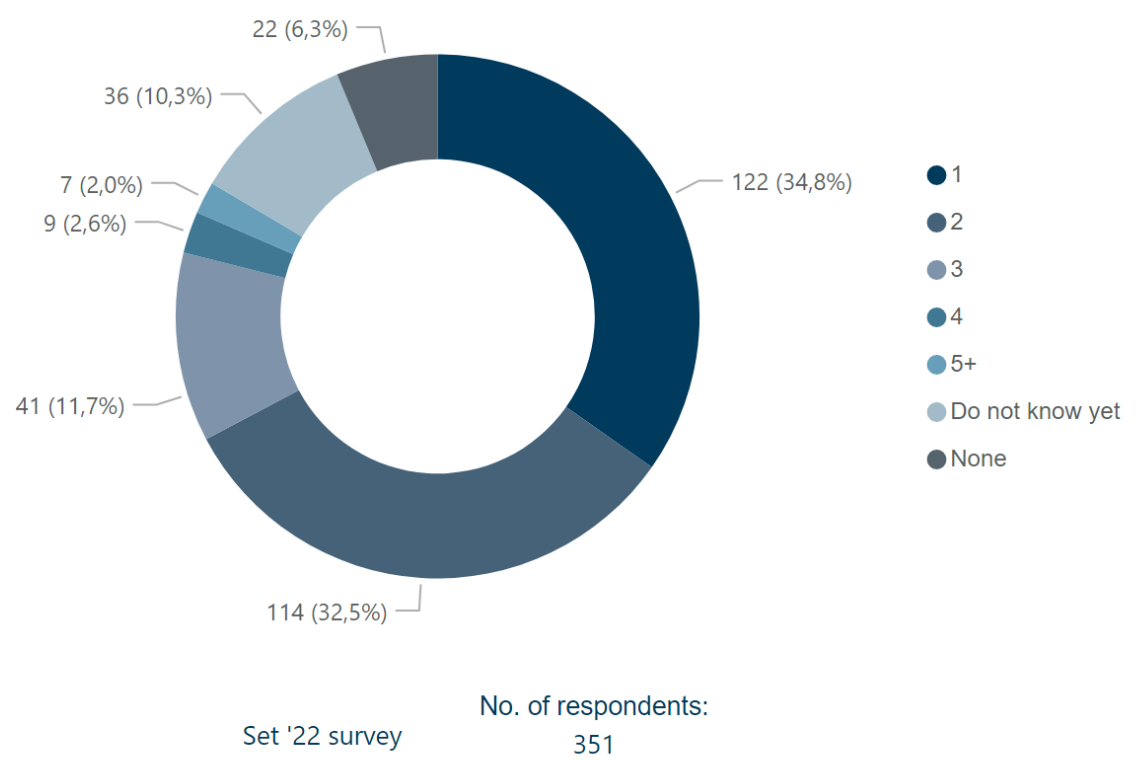
Set '22 survey
No. of respondents:
351

Intention to travel to Portugal in the next 6 months is much more very likely among the 55 or more age group travellers, than among the others. Among the 18-24 and the 25-34 age groups that intention remains mostly likely.

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

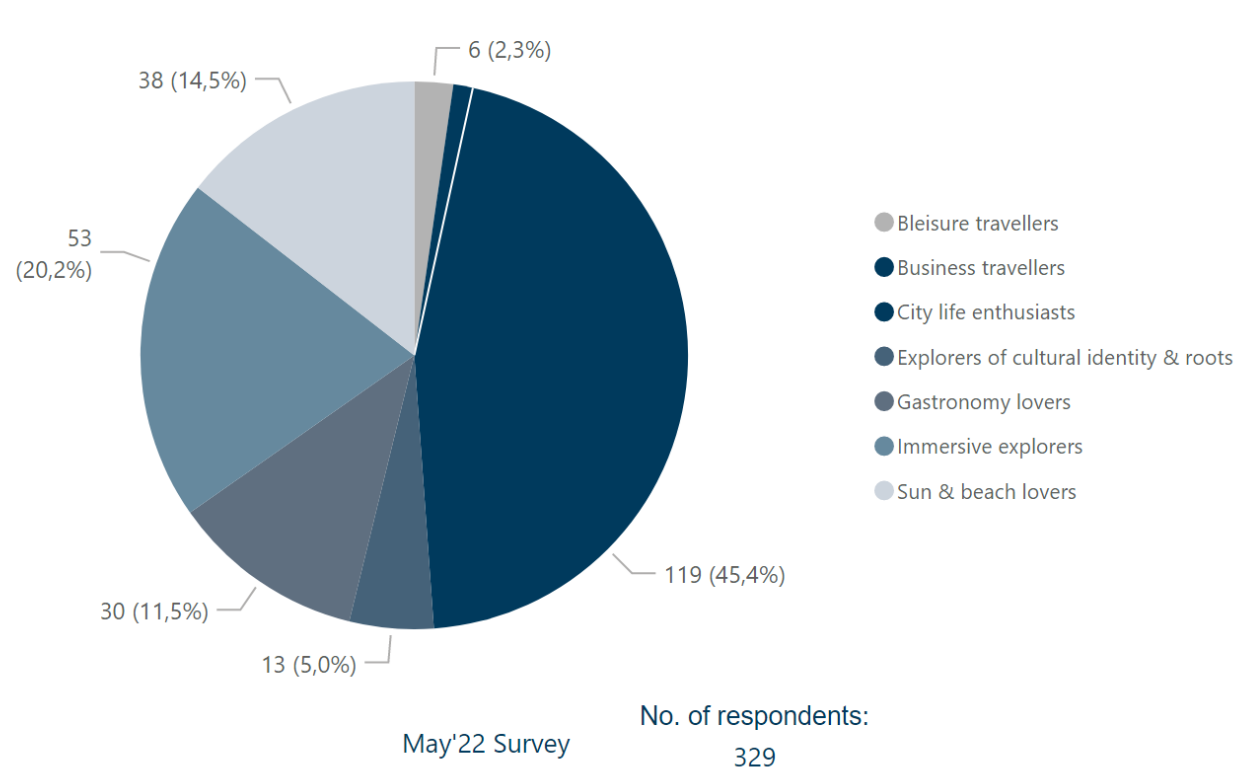
How many trips travellers plan to take in the next 6 months



More than 66% 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



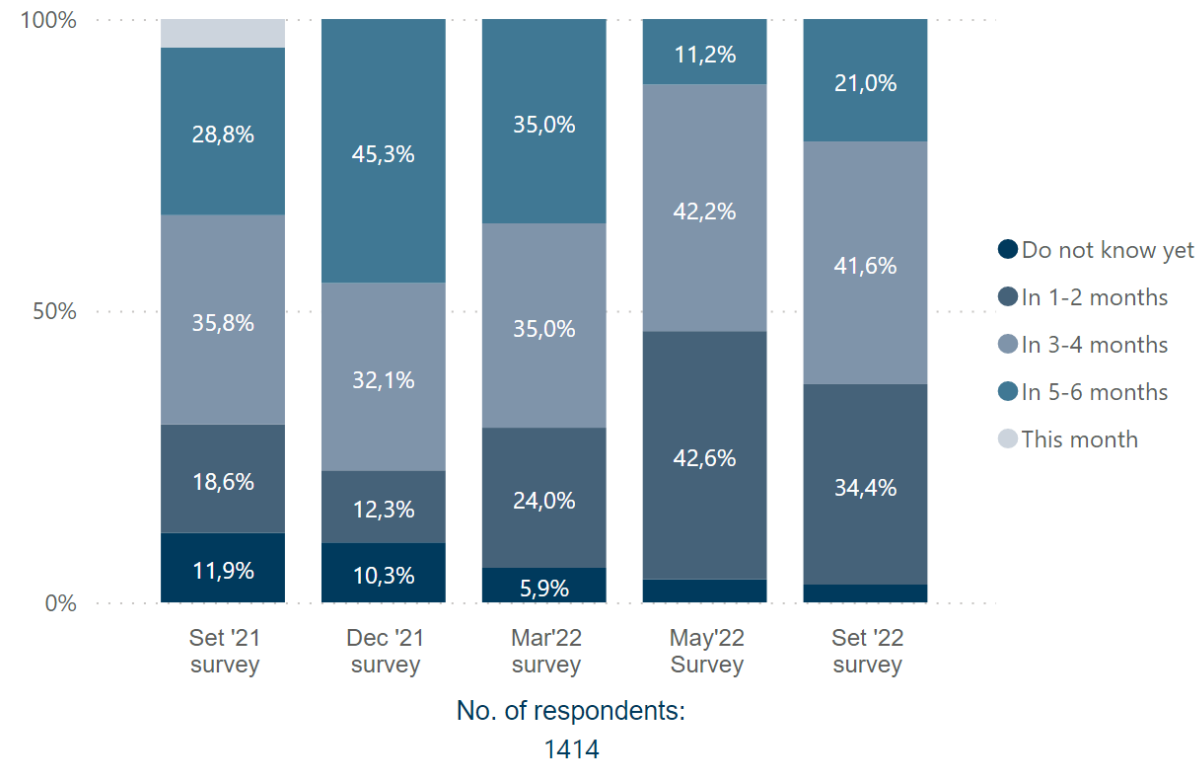
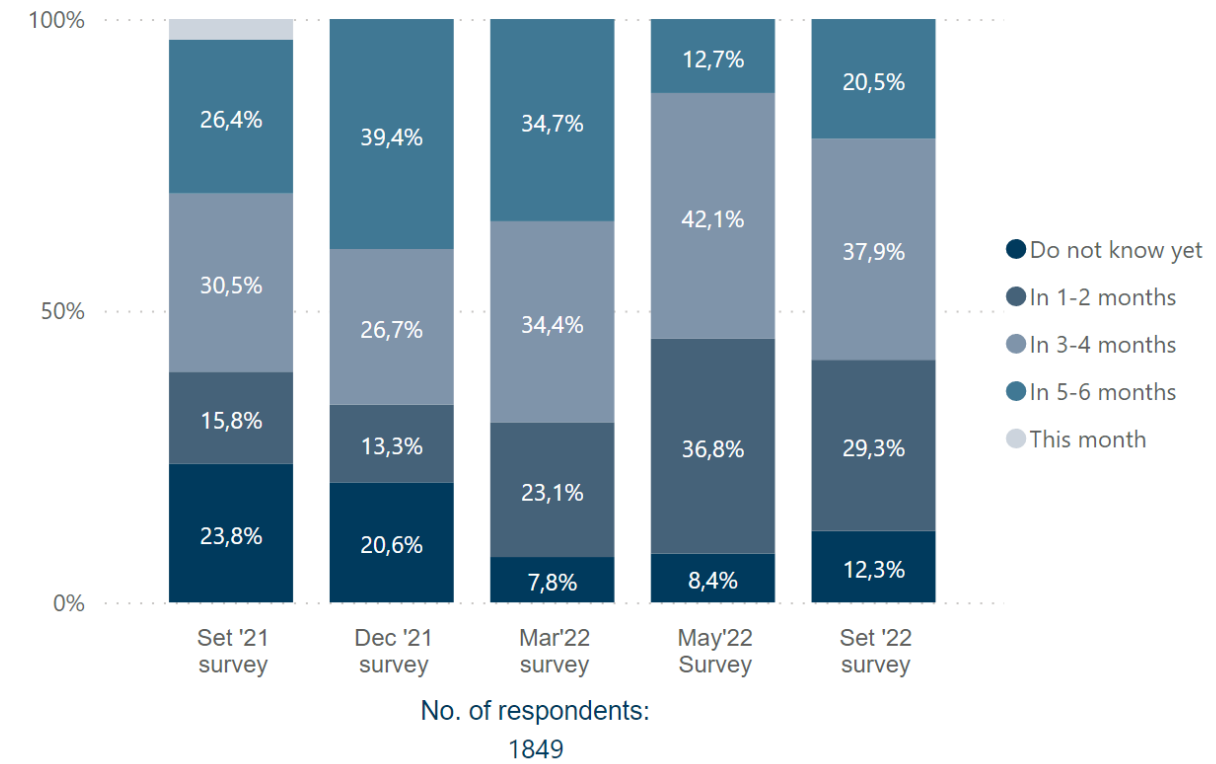
Urban destinations continue to maintain a steady fascination among travellers that plan to travel to Portugal (with a 5% increase in relation to the previous wave), while sun and beach destinations lose their second place in travellers destination's preferences for the ones that offer immersive, unique and simple local experiences.

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

TRAVEL INTENTIONS

When will Europeans travel next?

Total sample vs. early-bird travellers*



Compared to the previous wave, the willingness to travel during a time period between 1 to 4 months counted from the survey's submission date decreased significantly (37,9% against 42,1% for the 3-4 months interval and 29,3% against 36,8% for the 1-2 months one).

Early bird travellers are more willing to do their next travel in the next 3 to 4 months.

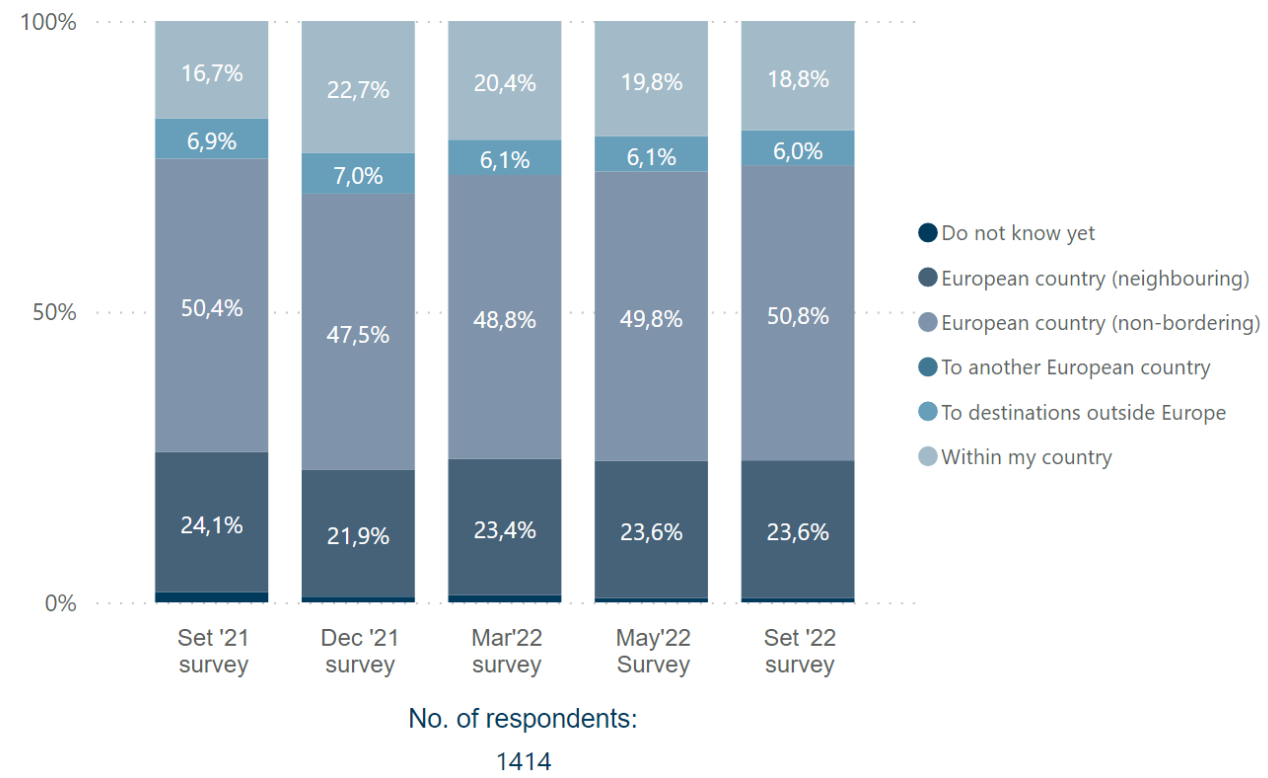
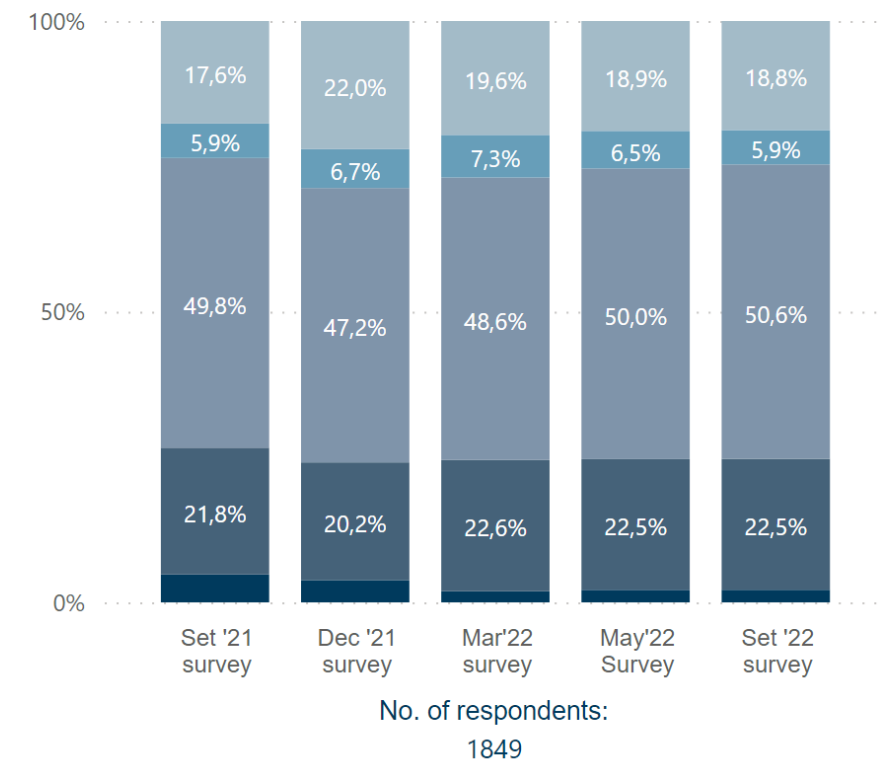
*Early bird travellers refers to respondents with short-term travel plans/ most likely to travel in the next 6 months

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 vs. early-bird travellers



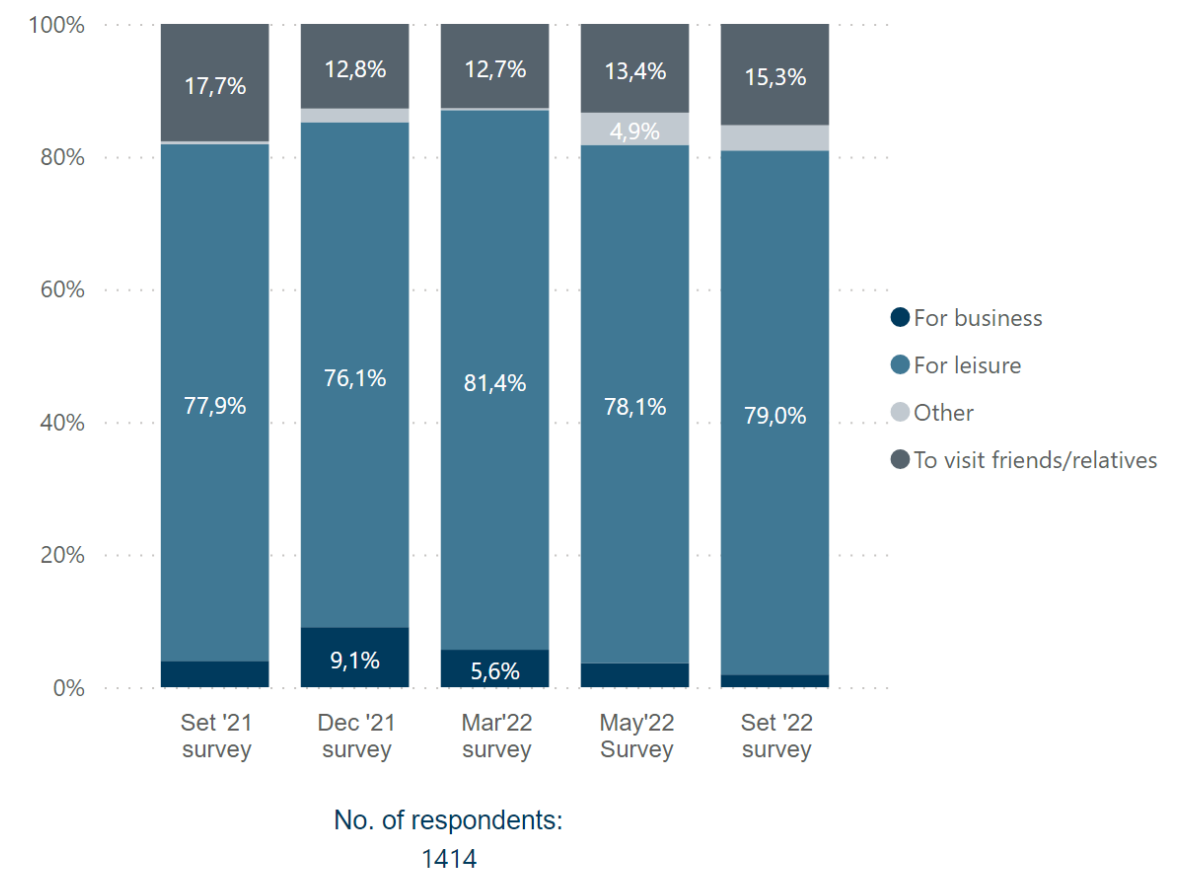
International travel within Europe remains respondents' leading choice, a trend equally strong among "early-bird" travellers.

Although Portugal continues to be one of the TOP 10 European countries preferred by respondents to travel to next, it dropped from 7th to 8th position in the respondents' preferences as a travel destination since the previous wave (4,9% of the Europeans were willing to travel to Portugal previously, while presently only 4,2% chose this destination).

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

TRAVEL INTENTIONS

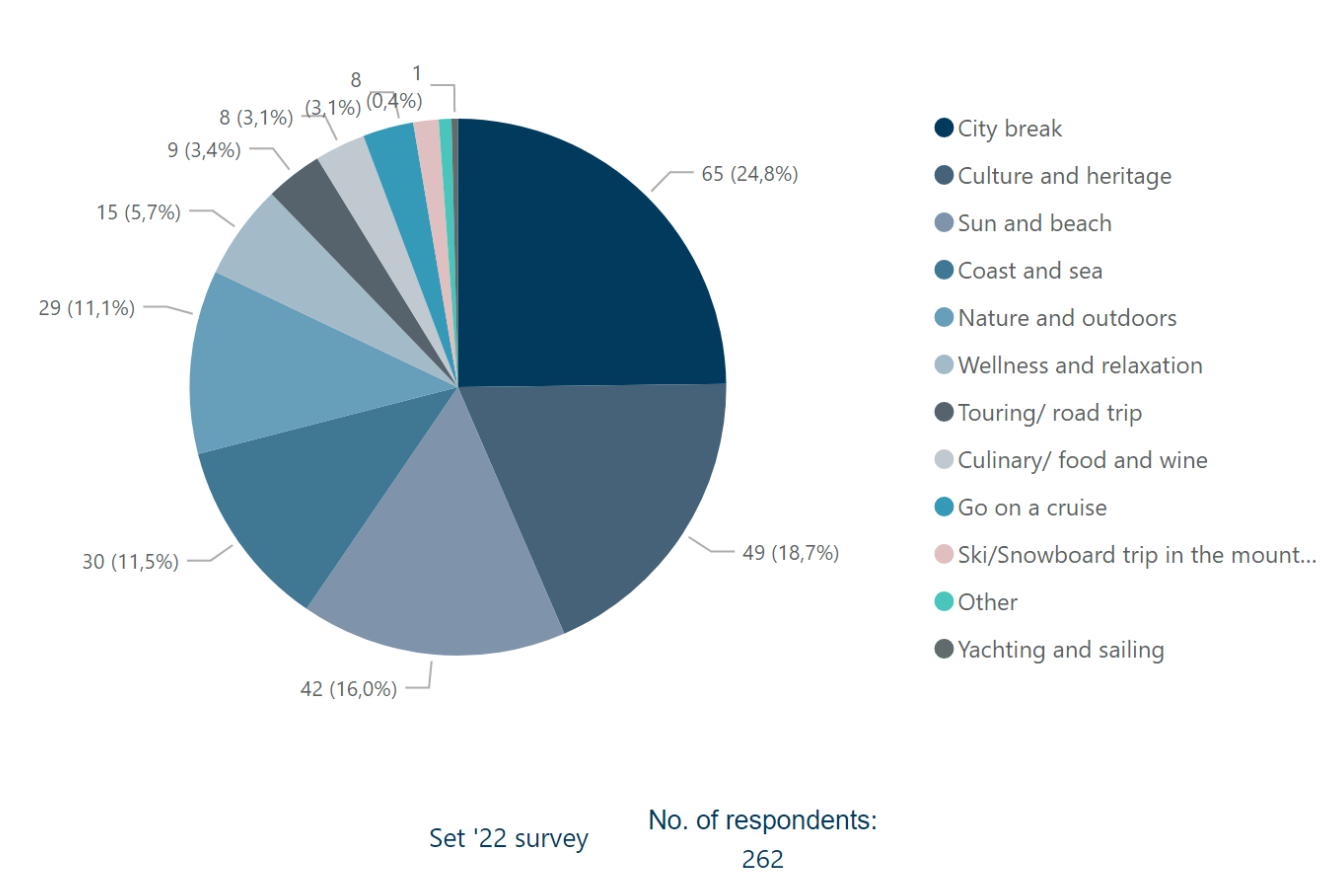
Purpose of travel for respondents most likely to travel in the next 6 months



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, this Autumn being no exception.

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



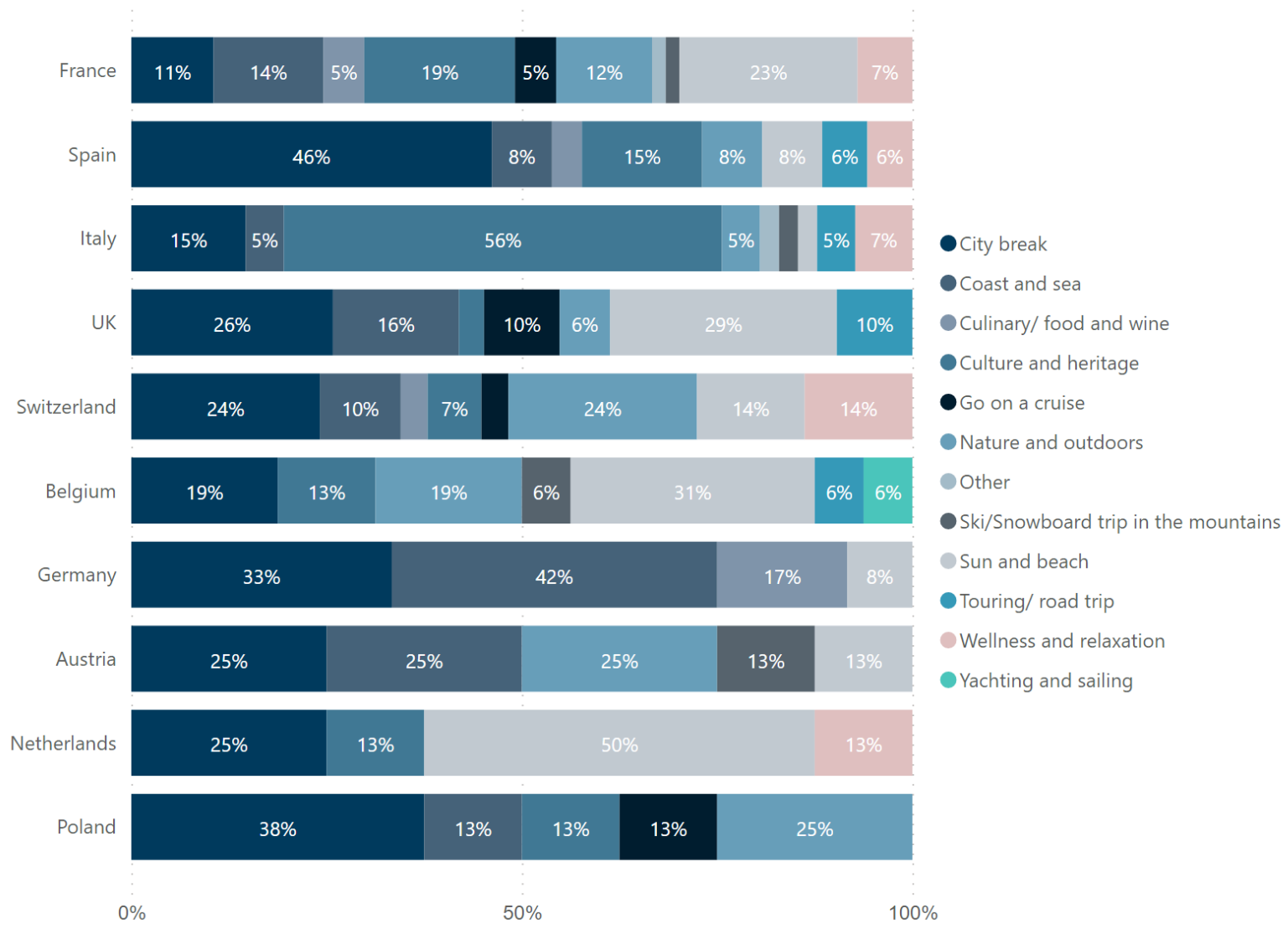
Almost 45% of Europeans that are willing to travel to Portugal in the next 6 months will do it for City break (24,8%) and Culture and heritage (18,7%) motives. In spite of that, travelling to enjoy the sun and beach or the coast and sea remains strong among Europeans (16% and 11,5%, respectively).

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

TRAVEL INTENTIONS



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



Set '22 survey
No. of respondents:
262

Respondents from **Netherlands, Belgium and UK** head for Sun and Beach.



Germany respondents head for Coast and sea destinations.



Italy travellers head for culture and heritage.

The **Belgium and Germany** travellers have the highest % for trip's with culinary/food and wine type.



Respondents from **Austria** have the highest % for Ski/Snowboard trip in the mountains.



Nature and outdoors are mainly in demand for **Polish and Swiss** travellers.



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

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



02 TRAVEL PLANNING

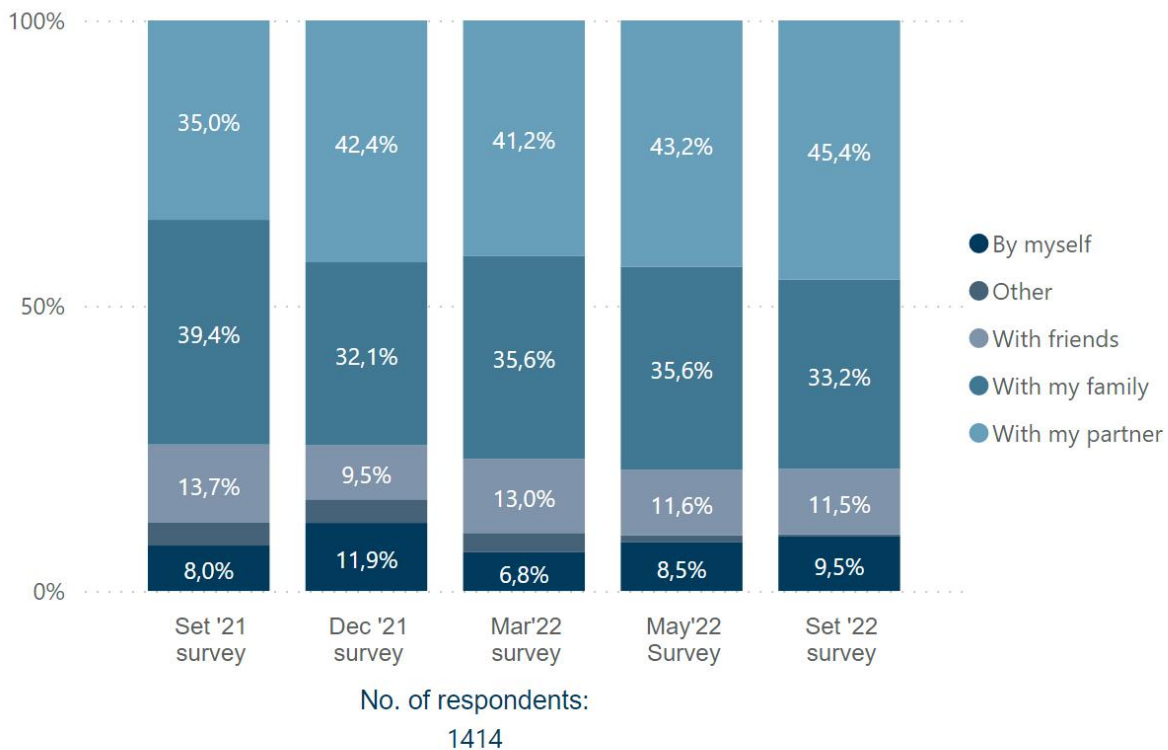


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Respondents that plan to travel to Portugal next



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

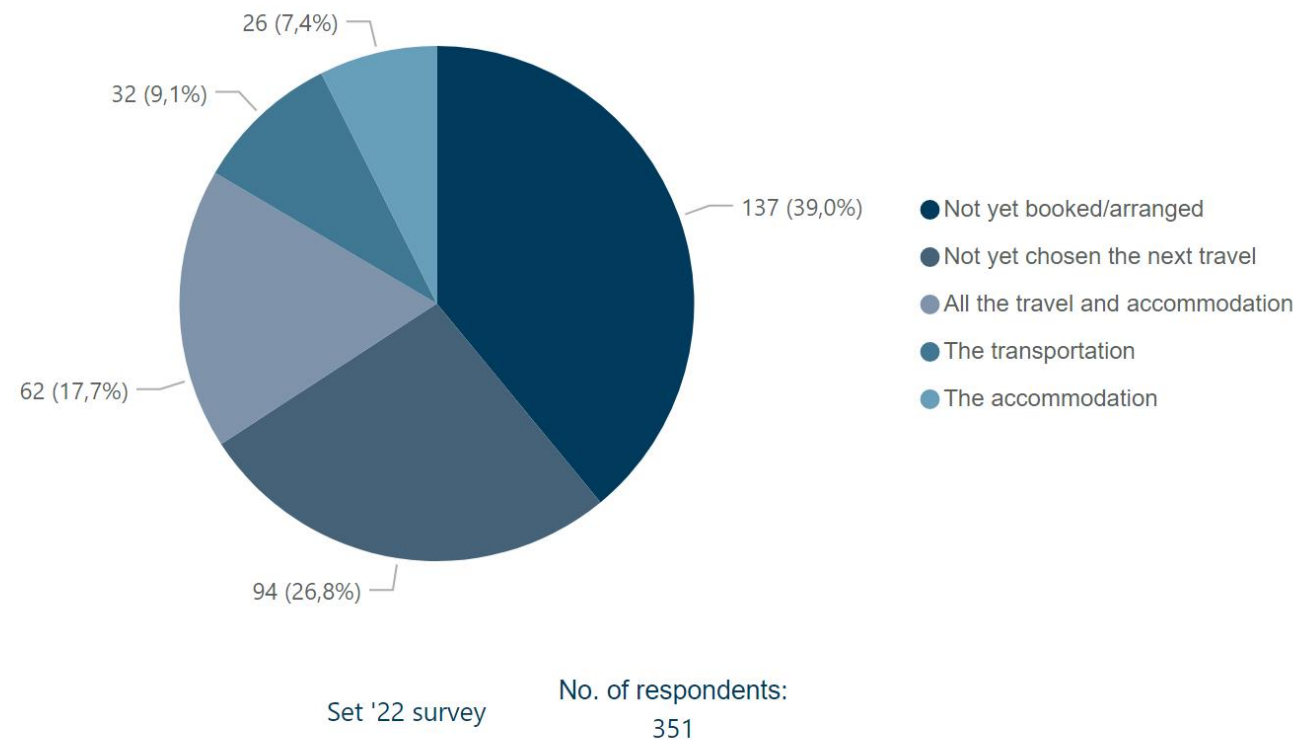


Compared to the previous wave, the preference for travelling with the partner increased, unlike the preference to travel with family, that decreased slightly in the present wave.



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

Status of planning for the next trip

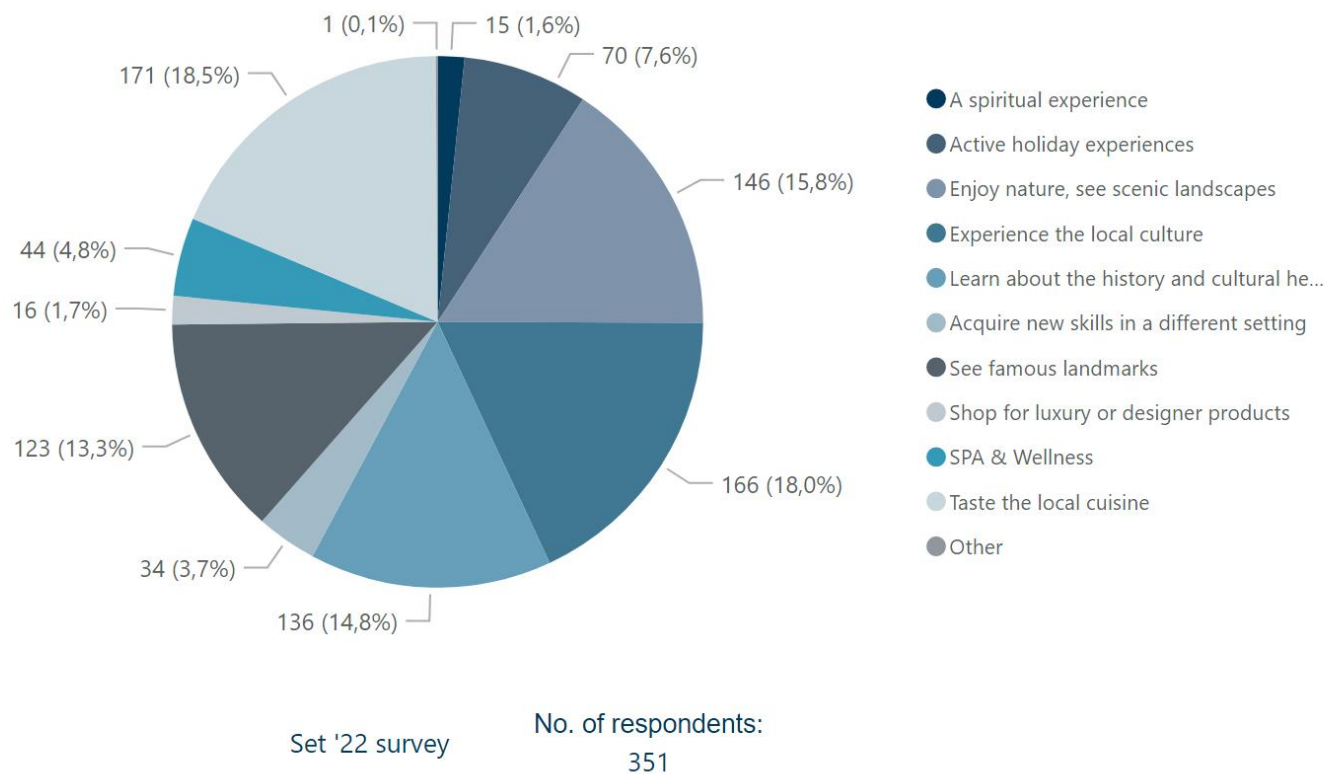


Only 34,2% of the respondents booked/arranged the next travel, compared to the almost 50% of the previous wave. Respondents that haven't yet chosen the next travel destination increased significantly in the present wave (26,78% against 14% in the past).

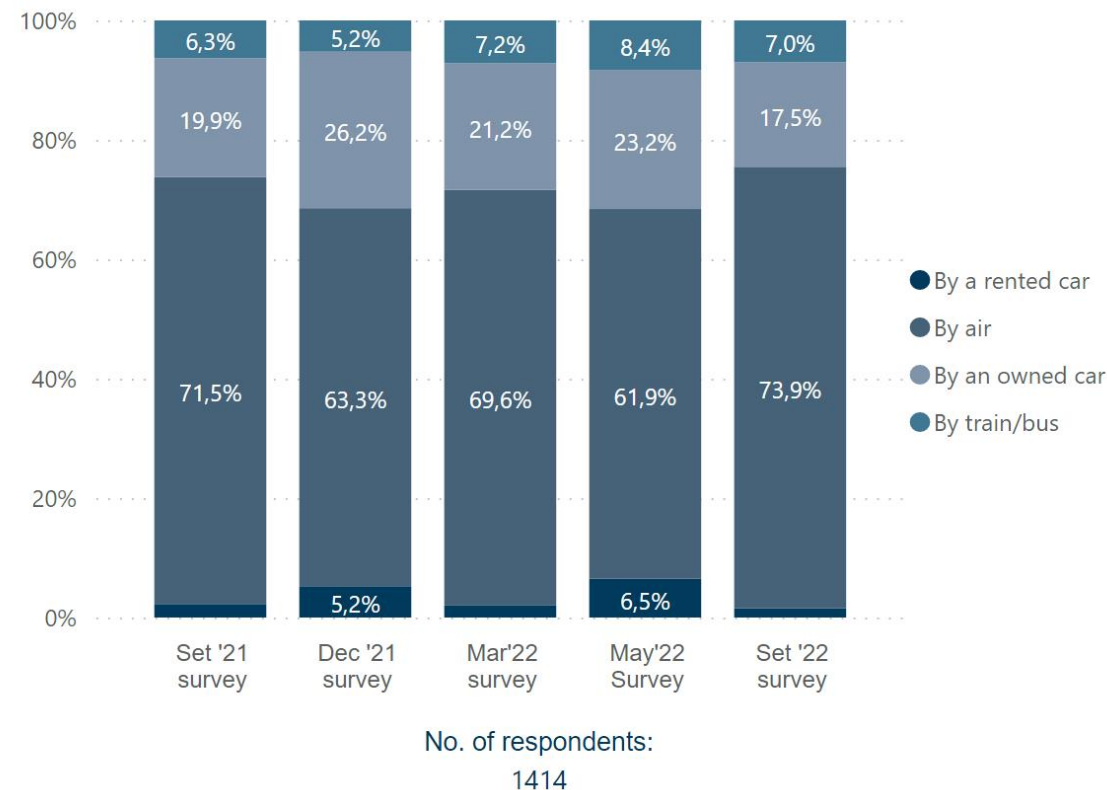
Question: Please select a response which best describes the planning for your next trip

TRAVEL PLANING

Travel experiences that europeans look for



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



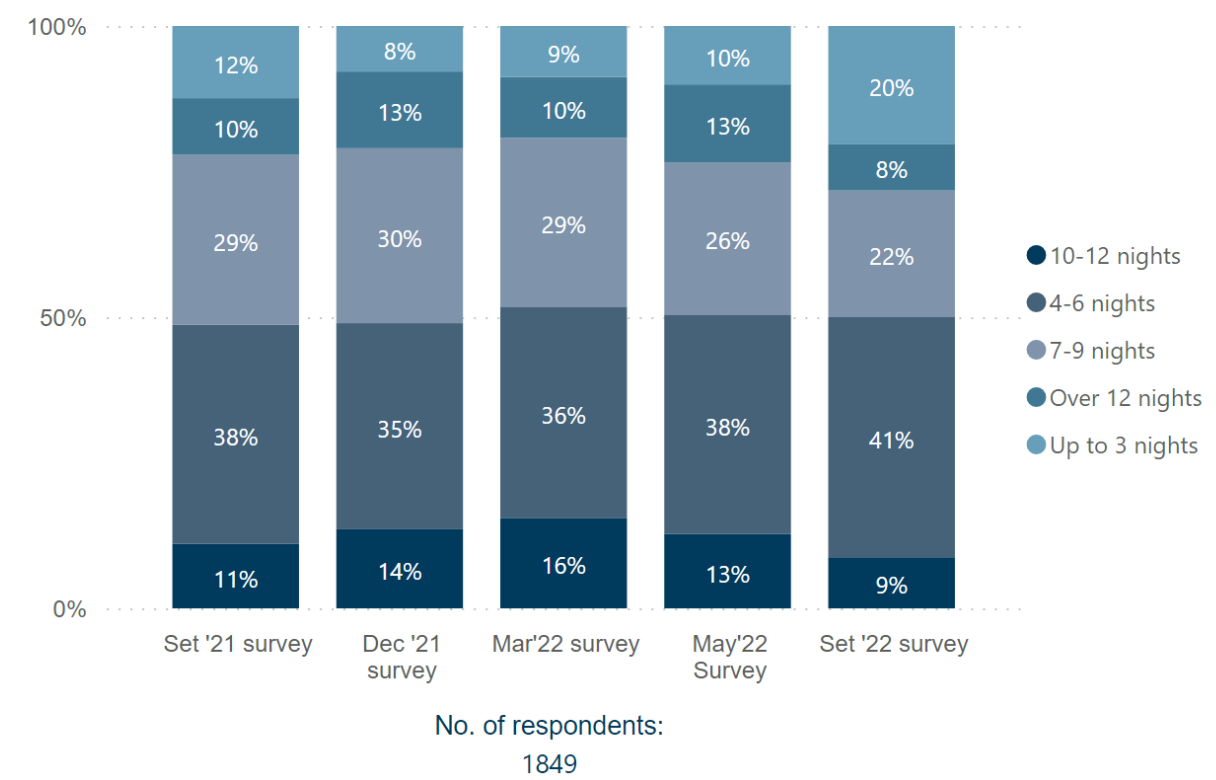
The top 3 travellers experiences that Europeans look for when travelling to Portugal are: taste the local cuisine, experience the local culture and enjoy nature by seeing scenic landscapes.

Air travel remains from afar the preferred means of transport of respondents that plan to travel to Portugal in the next 6 months, increasing almost 11% in the respondents preferences compared to the previous wave.

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

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

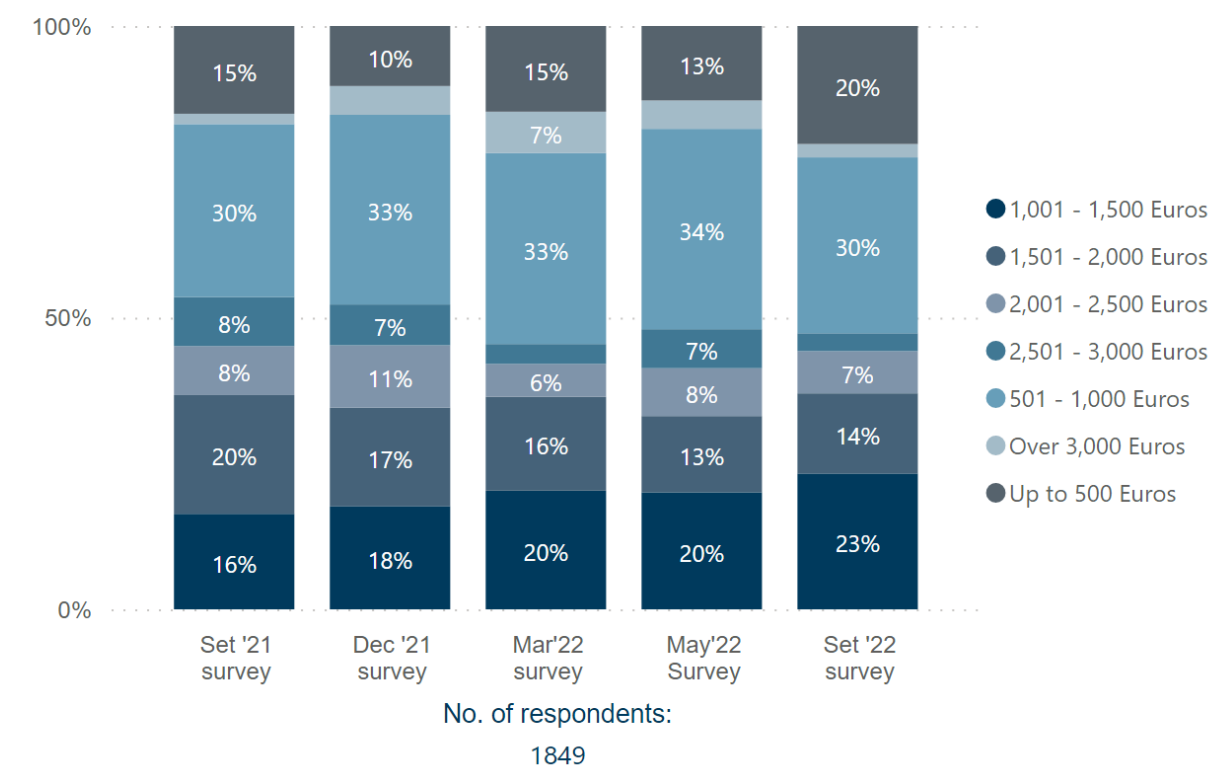
Length of next overnight trip



Travellers 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



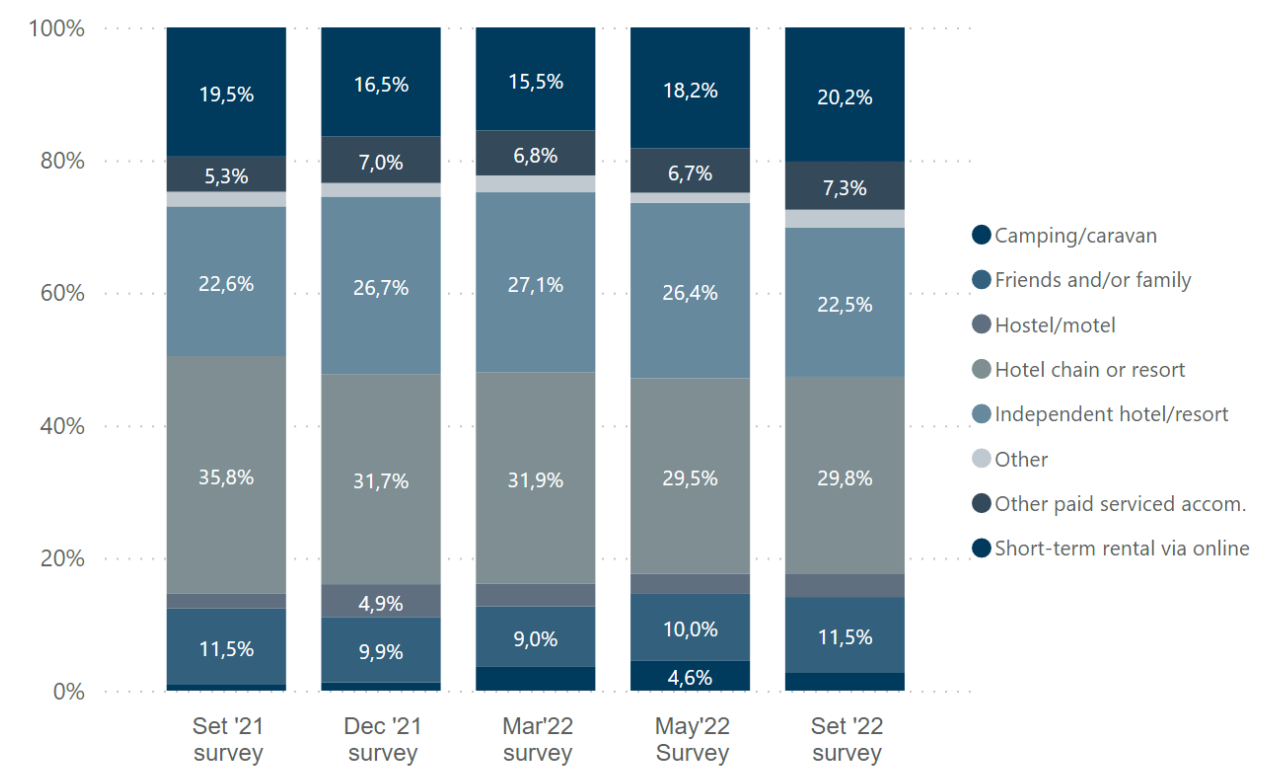
Travellers planning to travel to Portugal this Autumn and next Spring first intend to spend around 501€ - 1,000€ per person (including accommodation, transportation and travel activities), immediately followed by the group that expects only to spend up to 500€.

A small group of respondents (5%) is willing to spend above 2500€.

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

TRAVEL PLANING

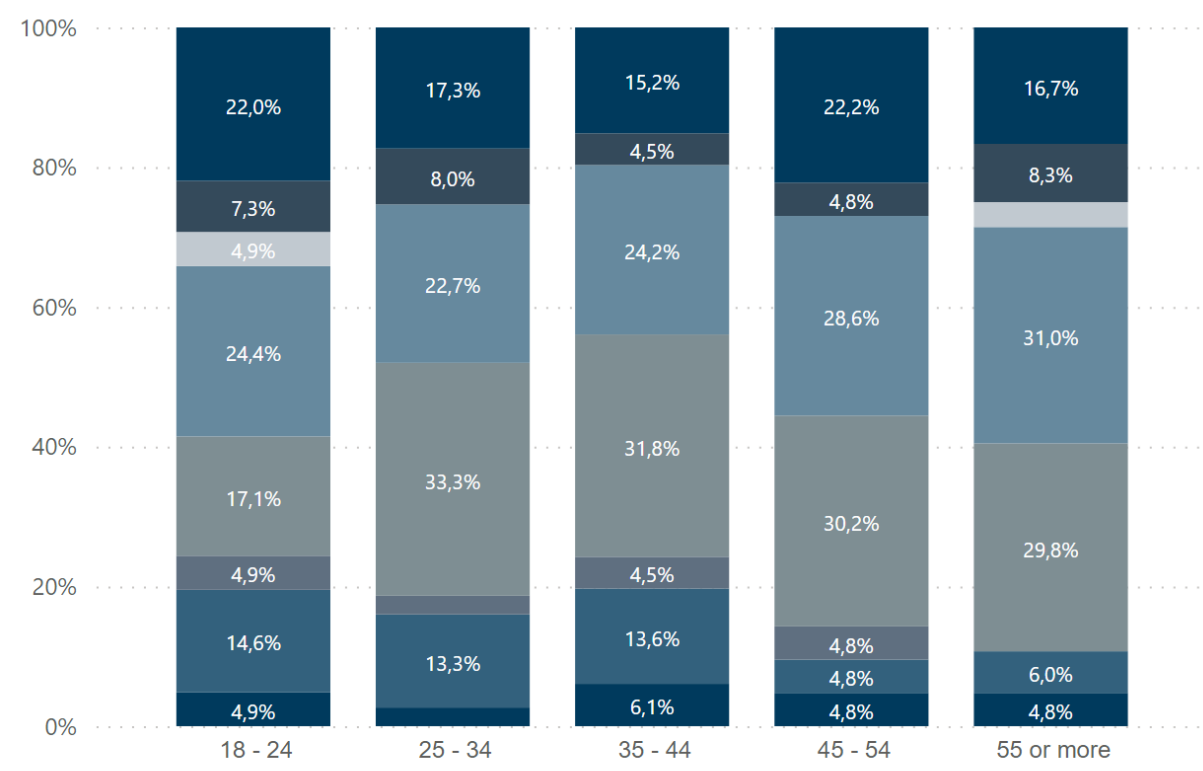
Preferred type of accommodation for respondents most likely to travel in the next 6 months



No. of respondents:
1414

The Hotel chain or resort type of accommodation continues to score the highest % among the Europeans preferences for type of accommodation for this Autumn and next Spring (29,8%), immediately followed by stays in independent hotels/resorts (22,5%).

Preferred type of accommodation for respondents most likely to travel in the next 6 months, by age



Set '22 survey No. of respondents:
262

Overall almost all age groups prefer the Hotel chain or resort type of accommodation to stay, when planning to travel to Portugal in the next 6 months, with the exception of the 55 or more age group and the 18-24 one, which prefer mainly to stay in independent hotels/resorts. This last group is the one that shows a more scattered type of accommodation preference between the different options.

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

03 TRAVEL CONCERNS

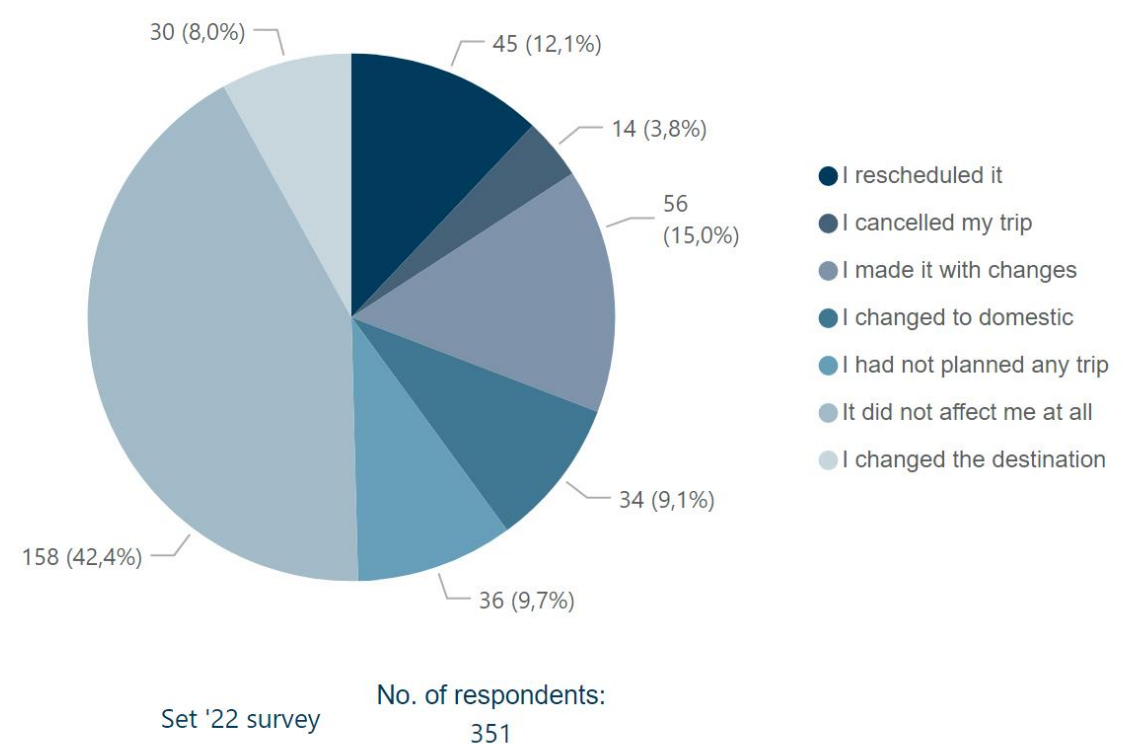


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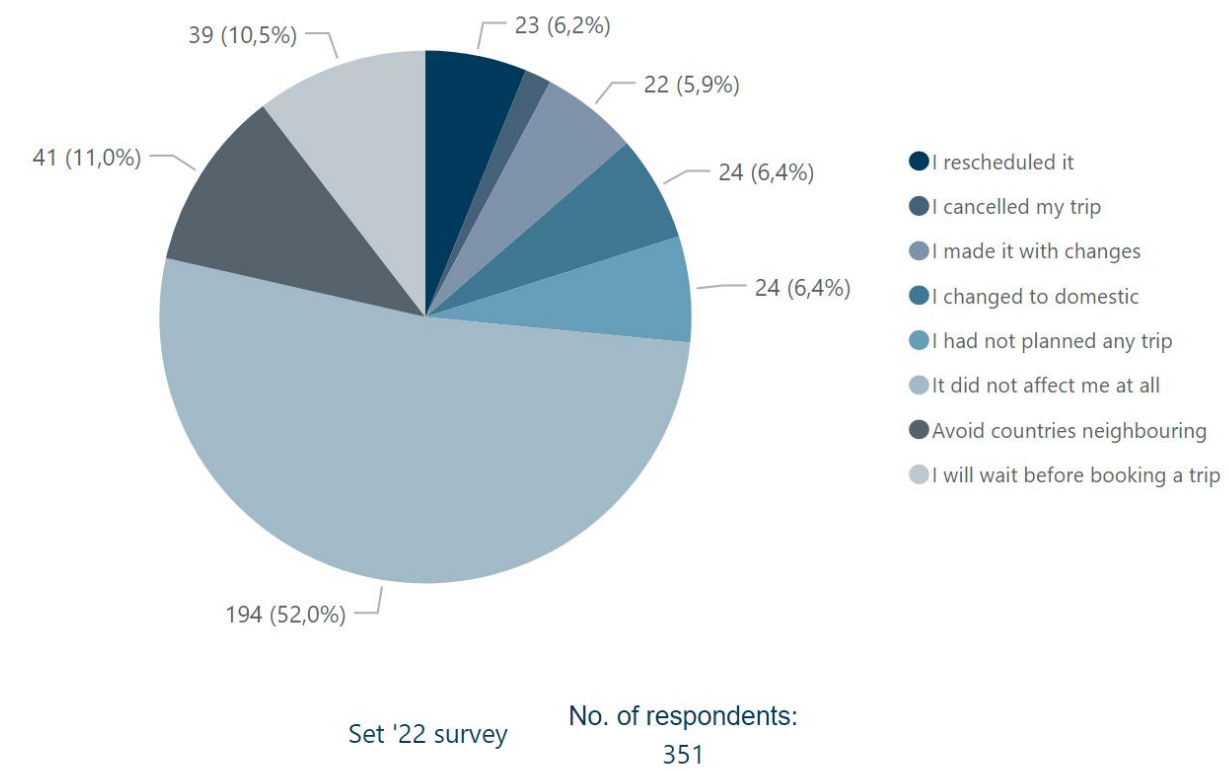
Respondents that plan to travel to Portugal next



How has COVID-19 affected travel plans?



How has the ongoing war affected travel plans?



Although according to latest surveys travellers felt that COVID-19 affected a large part of their plans, the perception that the pandemic isn't affecting at all the respondents travel plans has been increasing (42,4% in the present survey against 35,8% in the previous one), being presently stronger than the contrary one.

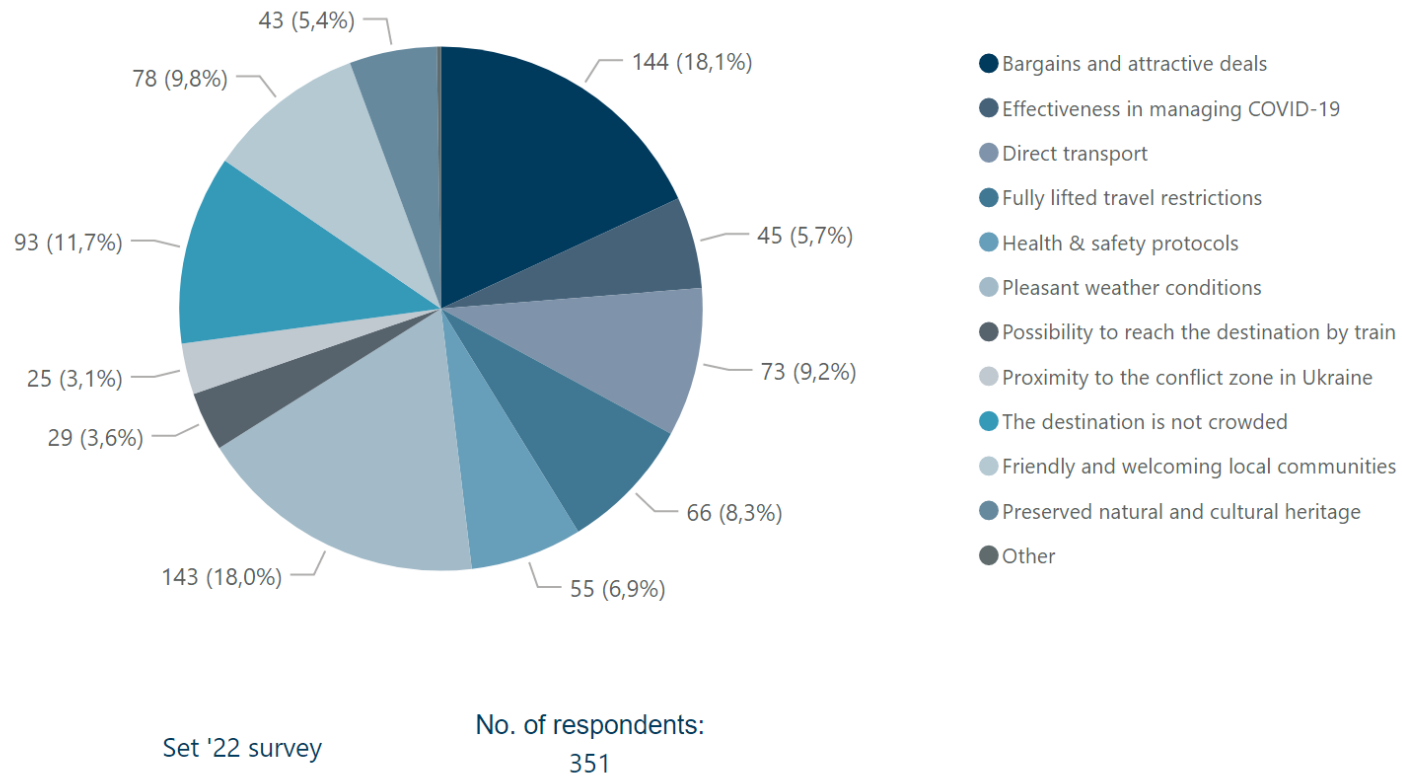
52% of the respondents declared that the ongoing war in Ukraine didn't affect their travel plans, against 48,9% in the previous survey.

Question: If you were planning to take an overnight trip in the next 6 months within Europe, how has COVID-19 affected your plans?

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



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



In the present survey there are 2 criteria that are clearly important for travellers to choose their nex holiday destination: **pleasant weather conditions** on the one side and **bargains and attractive deals** on the other.

The preference for the remaining criteria is somewhat scattered, although one can point out **avoiding crowed destinations**, the **presence of friendly and welcoming local communities** and **direct transport** as other important criteria.

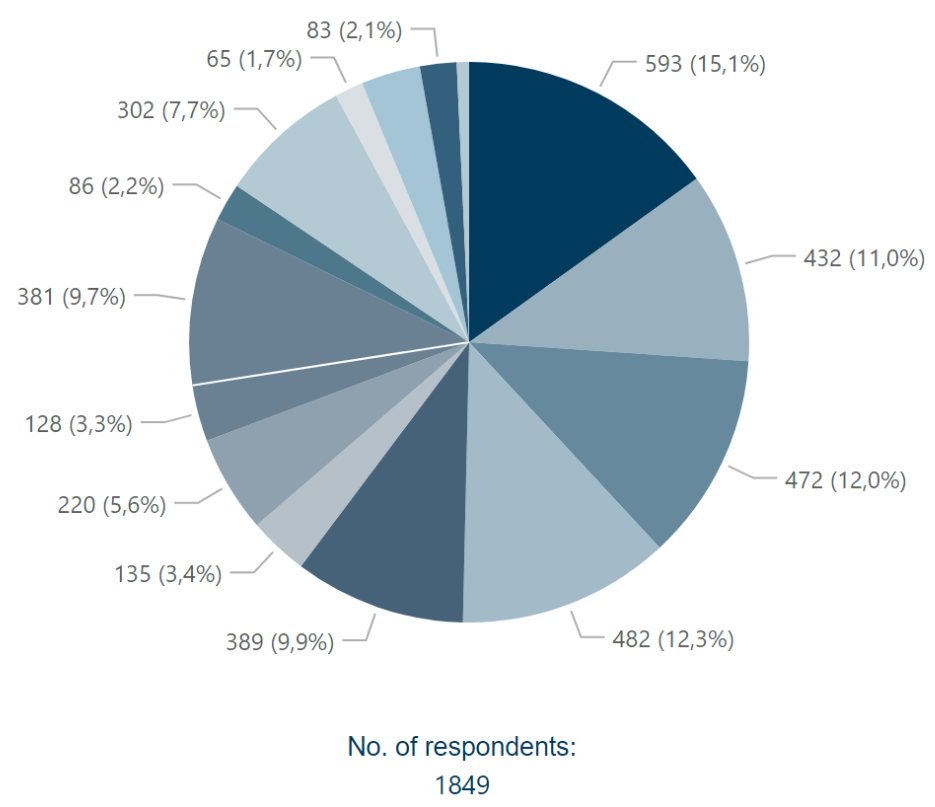
Proximity to the conflict zone in Ukraine is a concern of only 3,1% of the respondents, while **effectiveness in managing COVID-19** by the country's destination authorities represents 5,7% of the respondents concerns.

Question: What criteria will play the most important role in choosing your next holiday destination?

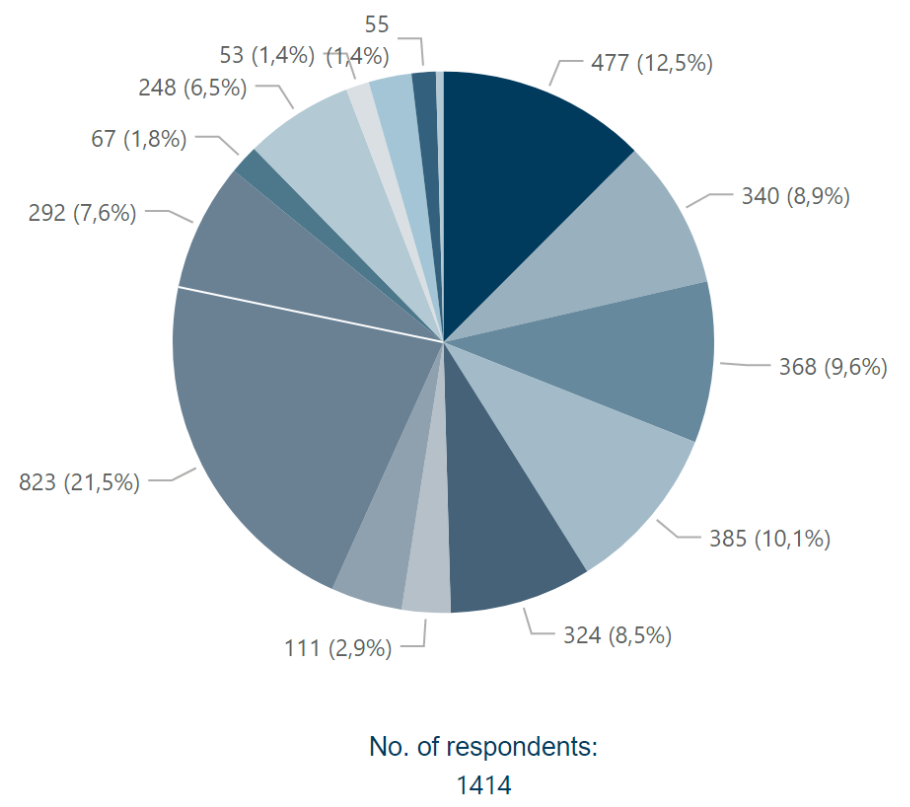


Leading concerns

Total sample vs. early-bird travellers*



- Quarantine measures
- Rising COVID-19 cases
- Becoming ill during my trip
- Changes in travel restrictions
- Booking and cancellation policies
- Transport and accommodation
- Limited options in the destination
- Organising all travel documents
- Economic situation and finances
- Government advice on travel
- Rise of costs due to inflation
- The environmental footprint
- The ongoing conflict in Ukraine
- Too many visitor
- Other



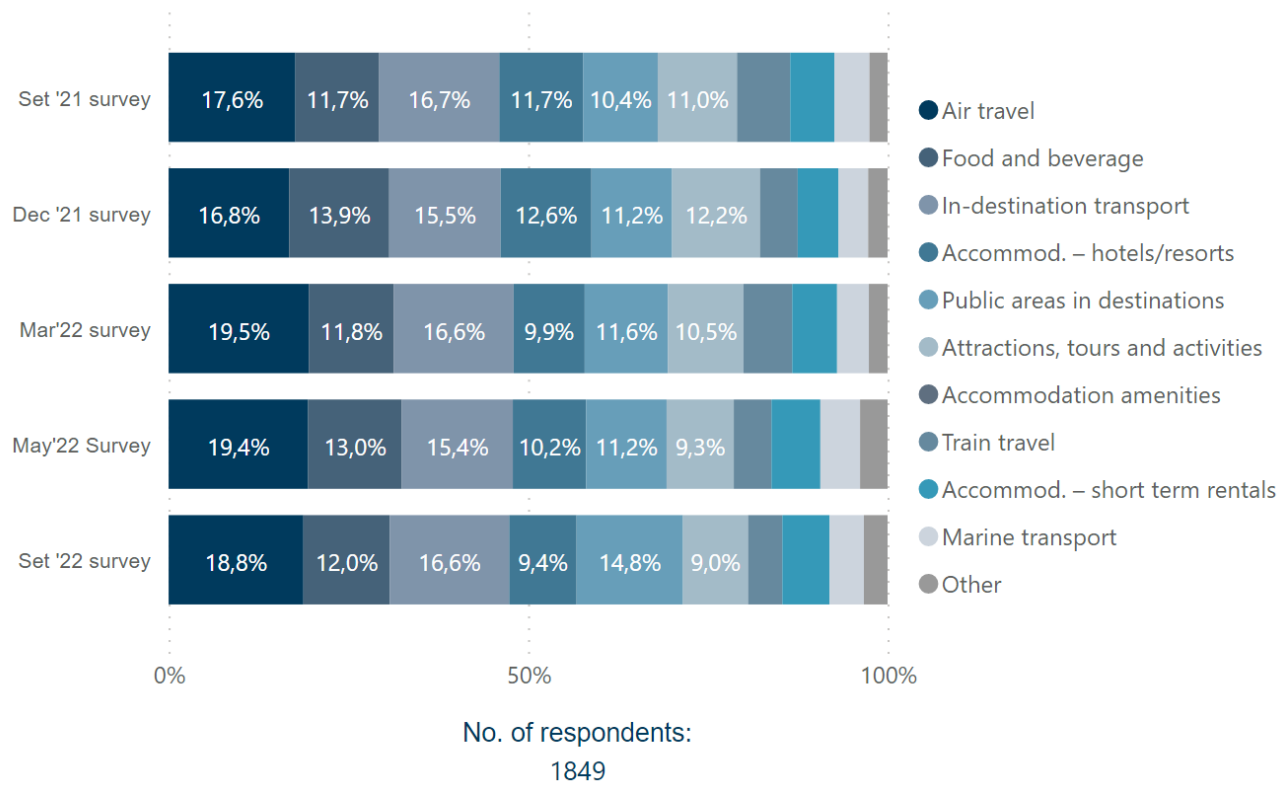
Disease related issues when travelling continue to be the leading concern of Europeans. Quarantine at the destination remains the major deterrent to European travel, immediately followed by changes in travel restrictions, becoming ill during the trip and the rising of COVID-19 cases.

The respondents that want to travel within the next 6 months have numerous concerns. Among these one may highlight organising all the necessary travel documents, quarantine measures, rising COVID-19 cases and changes in travel restrictions.

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

TRAVEL CONCERNS

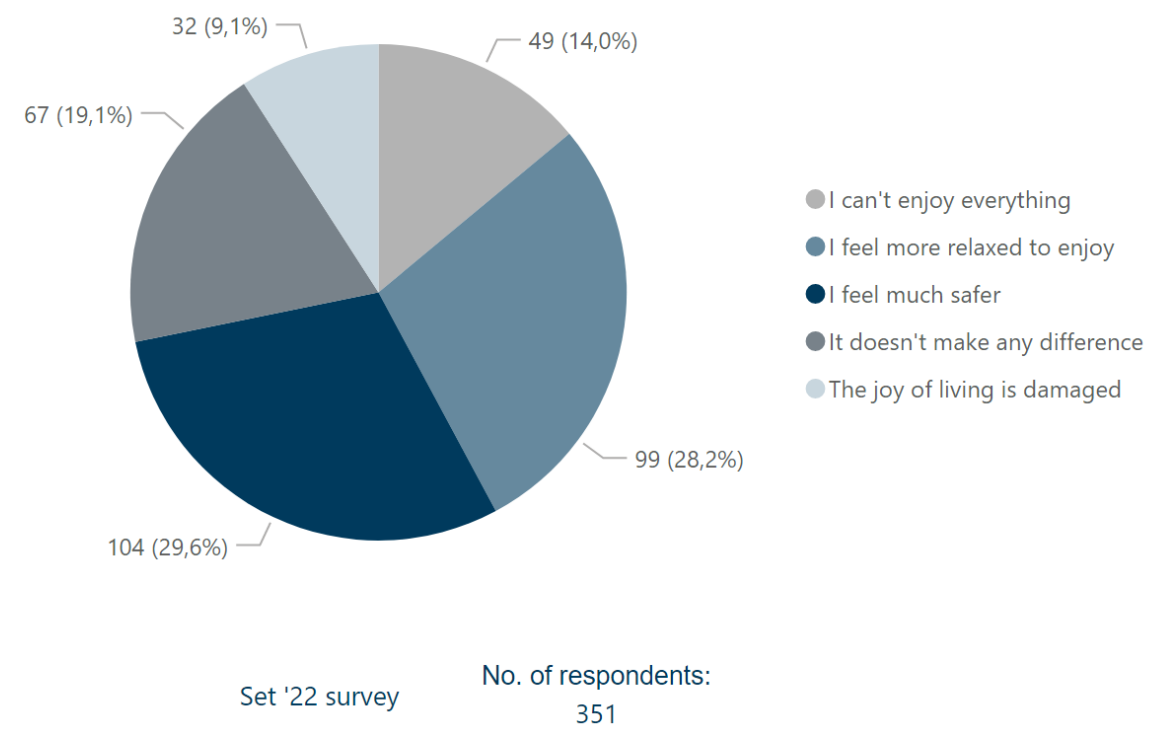
The most worrisome touch points during travel in relation to personal health & safety



Air travel still continues to be mentioned by all Europeans surveyed as the most worrisome part of the trip (18,8%), immediately followed by in-destination transport (16,6%) and the concern with the destinations public areas (14,8%), which in the present wave increased in comparison with the previous one.

Question: In relation to your personal health and safety, which parts of your journey will concern you the most?

Respondents' sentiment towards strict health & safety protocols

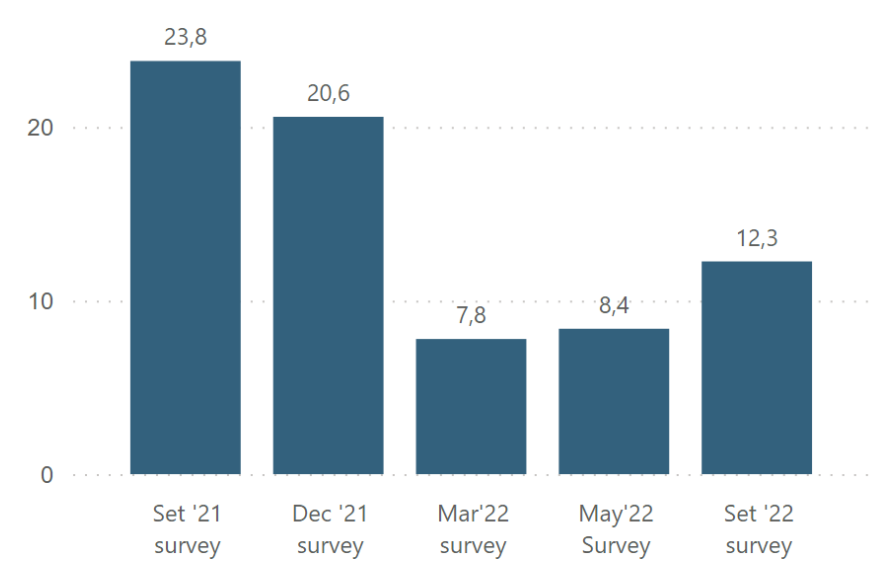


More than 29% of the respondents feel much safer when travelling to places with strict health and safety protocols, while 28,2% feel more relaxed to enjoy the trip.

Question: Please select a response which describes you the most: 'When I travel to places with strict health and safety protocols...'

TRAVEL CONCERNS

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



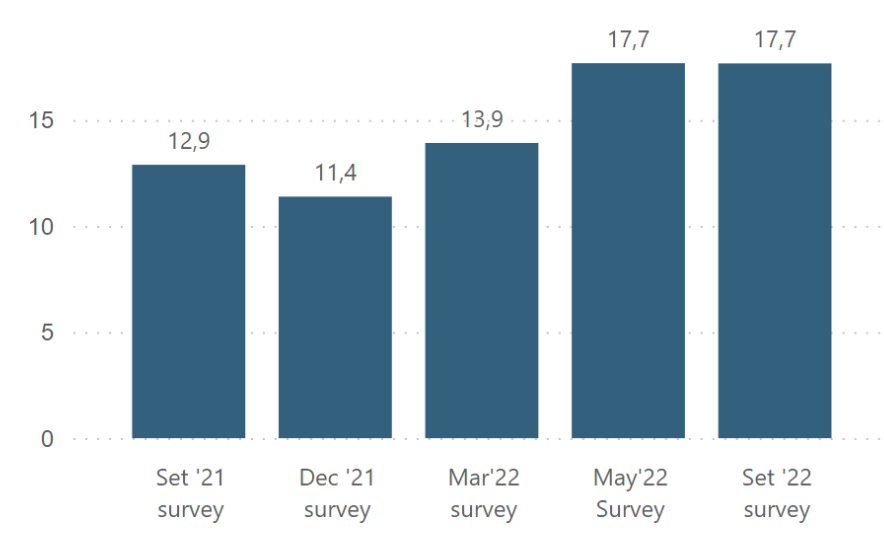
THE LEVEL OF UNCERTAINTY FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

12,3% of respondents state that **they do not know when they will travel next**

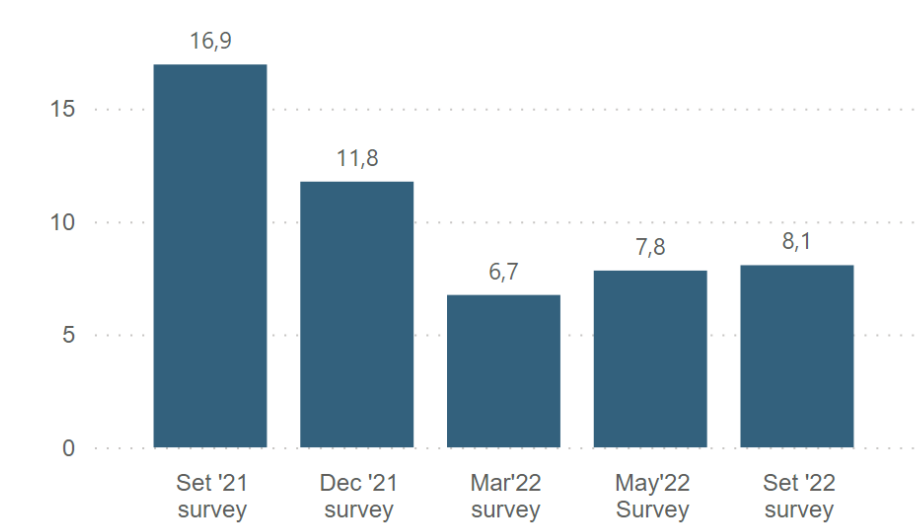
17,7% of respondents position **booking and cancellation policies** as one of the main concerns related to travelling

8,1% of respondents state that **they do not know where they intend to travel** to in the next 6 months

% of respondents position booking and cancellation policies as one of the main concerns related to travelling



% of respondents that do not know where they intend to travel to in the next 6 months



No. of respondents (Total):
1849

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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: September 2022