Holiday Sentiment Monitor

Results 18-measurement

January 2024

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Take outs

1. **Holiday intention for 2024 higher than a year ago.**
An average of 86% of those surveyed intend to go on holiday in 2024. A year ago, an average of 80% had a holiday intention for 2023. Holiday intention is currently highest among Britons (90%) and lowest among Americans (83%). Among Dutch people, it is 85%.

2. **Dutch people with holiday intentions expect to take two to three holidays in 2024.**
Those surveyed from six countries, who have a holiday intention for 2024, say they intend to take an average of 2.6 holidays. A year ago, this average was the same. The average for 2024 is highest among Americans (3.0) and lowest among Belgians (2.3). Among the Dutch it is (like last year) 2.4.

3. **32% have already booked their holidays, with many of them already leaving in the first few months of 2024.**
The share that has already booked a holiday is higher than a year ago (then 27% on average). In the United Kingdom, the share already booked is the highest (39%) and in the Netherlands and Belgium the lowest (both 29%). It is only amongst the Americans that the share that has already booked has not increased, compared to a year ago. Three quarters of those who have already booked indicate that their next holiday will be in the first half of 2024. For instance, 15% indicate that they will go in January, 13% in February and likewise 13% in April.

4. **Market potential: over 50% of respondents have holiday intentions but have yet to book. And of these, around 60% are already planning.**
54% of those surveyed say they have yet to book but have a holiday intention for 2024. Of that group, about 60% are already planning. They mostly focus on May (average 17%), June (15%) and July (15%). Of this group that is already planning on a holiday, the largest group plans to book within 1 to 3 months (average 42%). If people have holiday intentions but are not yet planning, it is mainly because they have not yet had time to do so (average 26%) or their financial situation does not allow it (average 8%).

5. **Fewer plans for holidays at home.**
Compared to 2023, less Dutch respondents plan to spend their next 2024 holiday in their own country. This is also true for the French and Americans. Most Dutch and Belgians plan to spend their next holiday (elsewhere) in Europe. Many Dutch people travelling alone (solo) have plans for intercontinental trips (mostly to Asia) and although less than last year, many French and American respondents are planning to holiday in their own country.

Take outs

6.

Gelderland and Limburg most considered for holidays at home.
Dutch people who want to spend their next holiday in the Netherlands in 2024 said they would most often do so in Gelderland and Limburg (both 14%). This is followed by Drenthe with 11%. Compared to a year ago, plans for a holiday/weekend break in Noord-Holland have decreased.

7.

Aeroplane again most chosen for European holiday.
Plane is the most chosen means of transport for the next holiday in Europe (average 56%). A year ago, this was 53% on average. Among the Dutch, Belgians and Germans, the car also scores relatively high. Furthermore, a relatively high number of French respondents are considering travelling by train. Among the Dutch, this share (train) has increased compared to a year ago (from 5% to 8%).

8.

Sustainability, prices and extreme weather conditions most important.
This measurement shows that, sustainability, prices and extreme weather are currently the most considered factors when booking a holiday. 49% of those surveyed think it is important to consider the environment (e.g. transport, destination, accommodation). In addition, 48% say they are forced to adjust their holiday behaviour due to rising prices. Finally, 39% say that increasing extreme weather conditions influence their choice of holidays. These three topics are thus more influential than topics such as possible crowding at airports, wars/conflicts in the world and the coronavirus.

9.

On average, 30% have used an AI tool such as ChatGPT, and of these, 32% use it for holiday inspiration.
On average, 30% of those surveyed are familiar with AI tools like ChatGPT and have used them. On average, 45% know what AI is, but have never used it and 25% do not know what an AI tool like ChatGPT is. In general, the younger the respondent is, the more familiar they are with it. Of those who do use an AI tool like ChatGPT, an average of 32% use it for holiday inspiration.

1. Holiday planning results

Holiday intention for 2024 is highest among the British (90%) and the French (87%). On average, 86% of respondents from these six countries have an intention to go on holiday in the year 2024, some of whom have already booked and some of whom have yet to book. These could be short or long holidays at home or abroad. A year ago, an average of 80% had a holiday intention for 2023.

85%

85%

84%

87%

90%

83%
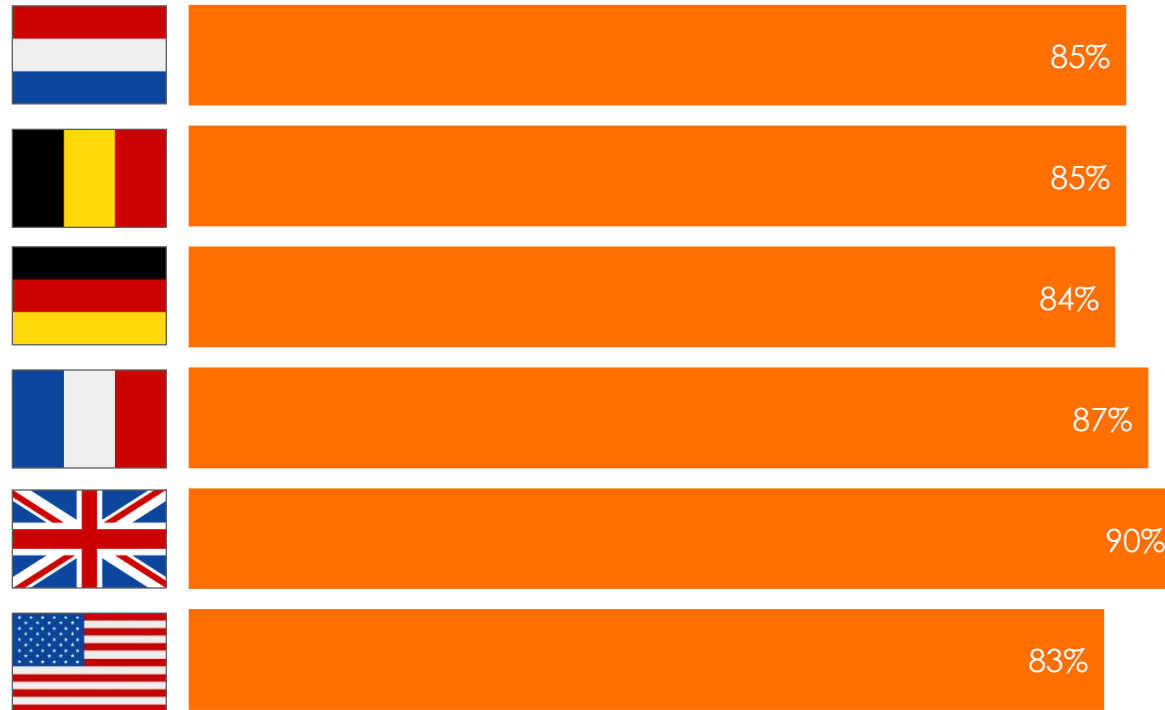
Holiday intention for 2024 (% top 2):

- Yes, I have already booked
- Yes, but I have yet to book

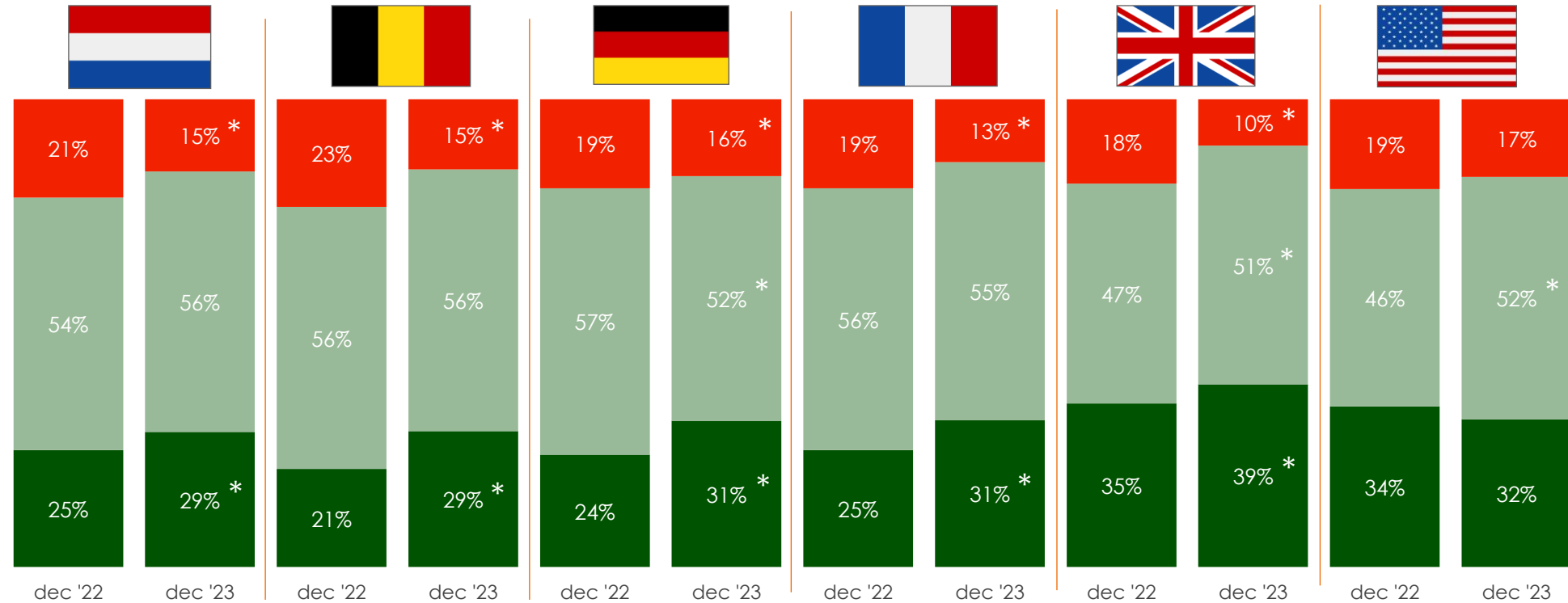**On average, 32% have already booked a holiday for 2024. This is a higher percentage than a year ago, when it was 27%. The British currently have the highest proportion 'already booked' (39%). Among the Dutch and Belgians, this share is lowest (both 29%).**

	Netherlands		Belgium		Germany		France		UK		USA	
	dec '22	dec '23	dec '22	dec '23	dec '22	dec '23	dec '22	dec '23	dec '22	dec '23	dec '22	dec '23
No, no intention	21%	15% *	23%	15% *	19%	16% *	19%	13% *	18%	10% *	19%	17%
Yes, have yet to book	54%	56%	56%	56%	57%	52% *	56%	55%	47%	51% *	46%	52% *
Yes, already booked	25%	29% *	21%	29% *	24%	31% *	25%	31% *	35%	39% *	34%	32%

■ Yes, already booked   ■ Yes, have yet to book   ■ No, no intention
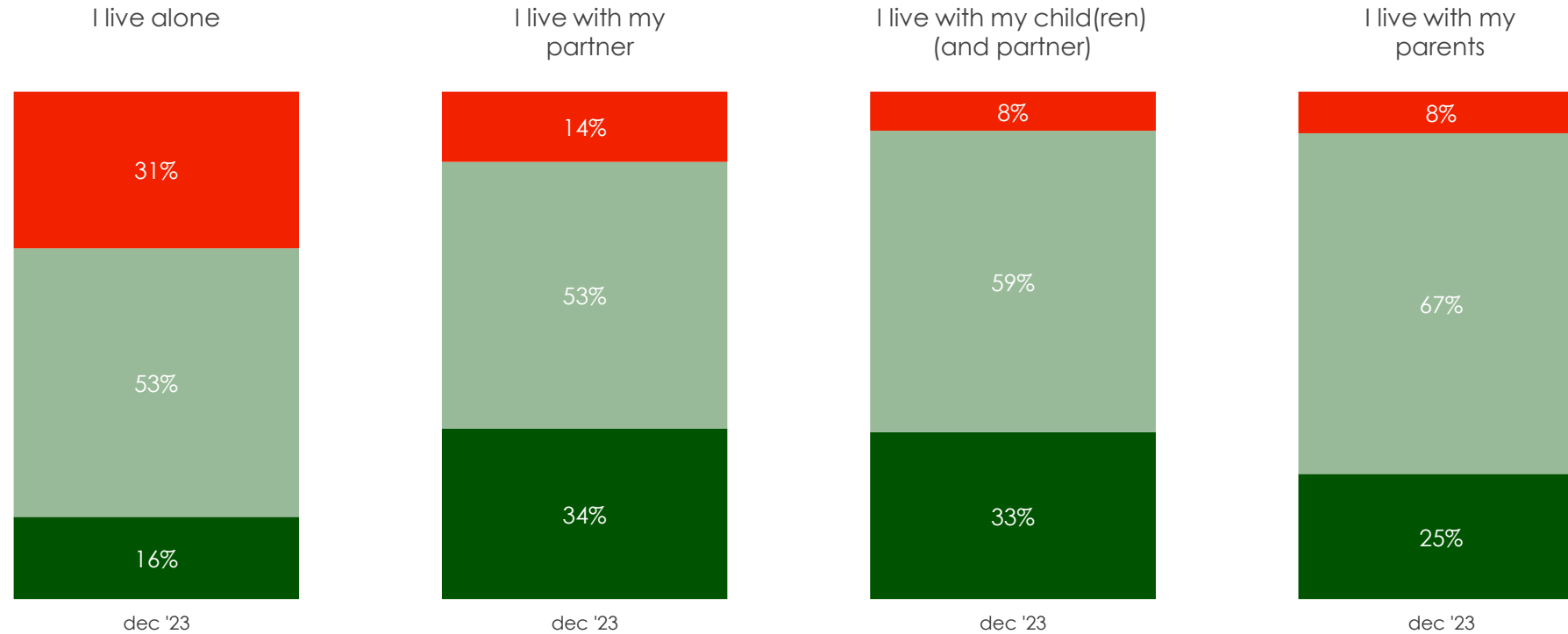
Base: everyone (entire sample)
*: significant difference compared to the measurement 1 year ago

Q: Do you currently intend to go on holiday sometime in 2024?
(In the Dec '22 measurement, it was about a holiday in 2023)

Holiday intention 2/2

Among the Dutch, the group 'I live with my partner' has booked 2024 holidays to the highest extent (34%). The group living with child(ren) (and partner) follows close behind (33%). Dutch people living alone have the least holiday plans, with 31% having no holiday intention for 2024 yet.

I live alone	I live with my partner	I live with my child(ren) (and partner)	I live with my parents
31%	14%	8%	8%
53%	53%	59%	67%
16%	34%	33%	25%
dec '23	dec '23	dec '23	dec '23

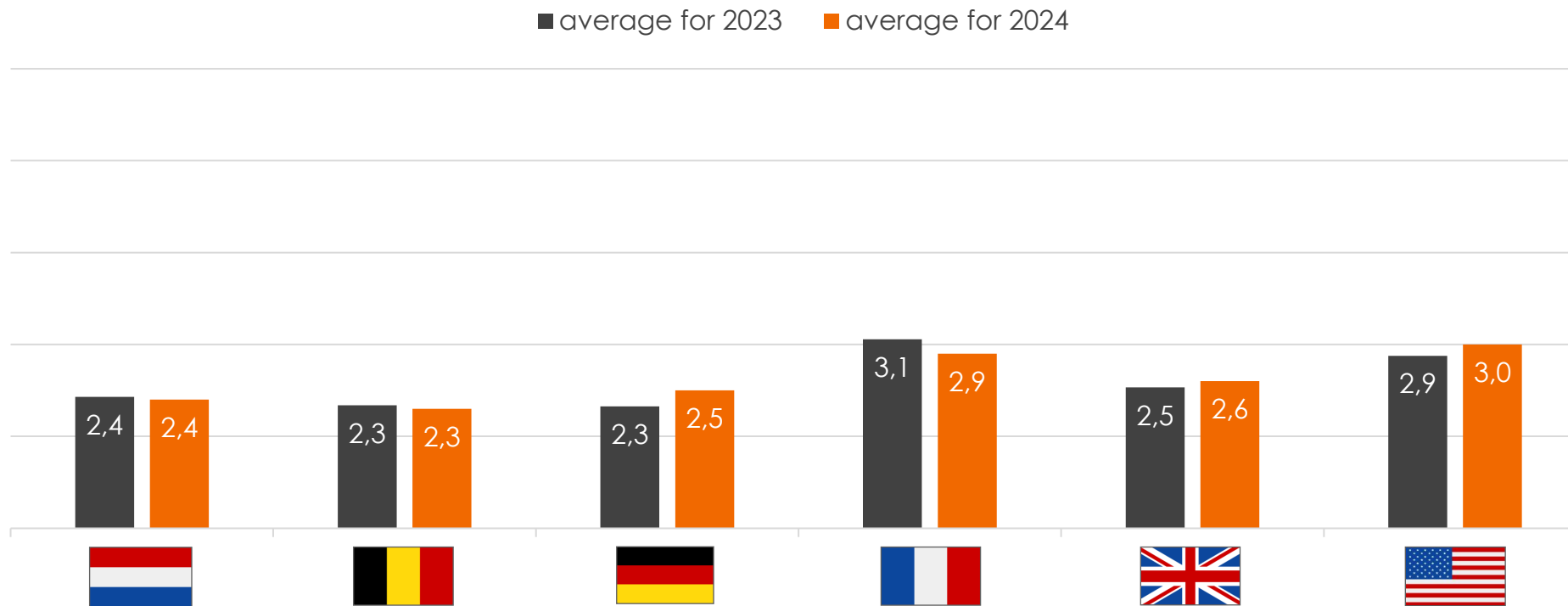■ Yes, already booked   ■ Yes, have yet to book   ■ No, no intention

Base: Dutch people (entire sample)
Note: the most common household/living situation types are shown here

Q: Do you currently intend to go on holiday sometime in 2024?

Holiday intention vs living situation (NL)

Those surveyed from the six countries below, who have a holiday intention for 2024, say they intend to take an average of 2.6 holidays. A year ago, this average was the same. The average for 2024 is highest among Americans (3.0) and lowest among Belgians (2.3). Among the Dutch - like last year - it is 2.4.

Legend: ■ average for 2023 ■ average for 2024

Netherlands: 2,4 / 2,4
Belgium: 2,3 / 2,3
Germany: 2,3 / 2,5
France: 3,1 / 2,9
United Kingdom: 2,5 / 2,6
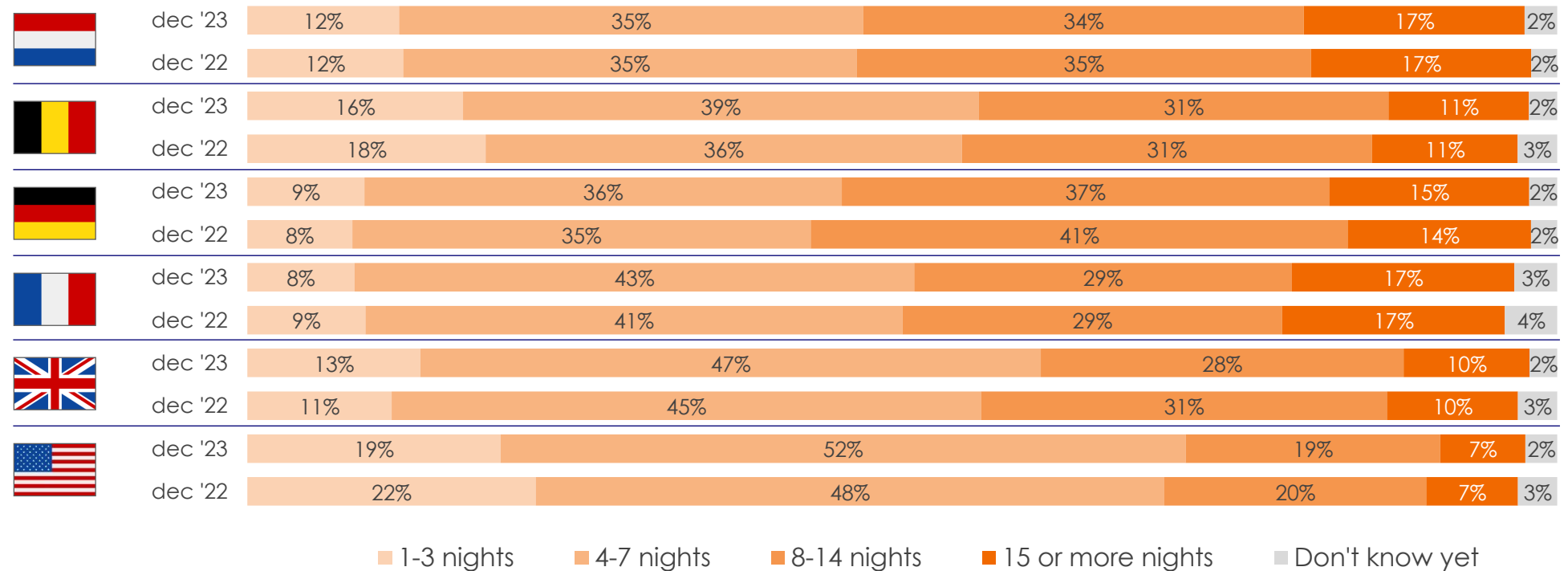United States: 2,9 / 3,0

Base: People with holiday plans for 2024 (booked or yet to book)
Last year, it asked about the number of holidays for 2023.

Q: How many holidays do you plan to take in 2024?
This can be either short or long holidays at home and abroad.

Number of holidays per year

On average, the majority of those surveyed with a holiday intention will go away for 4-7 nights for their next holiday (average 42%). After that, the 8-14 nights category is the most chosen (averaging 30%). A year ago, this was a similar pattern. Among Americans, the proportion of short holidays is highest compared to other countries; 19% go away for 1-3 nights.

		1-3 nights	4-7 nights	8-14 nights	15 or more nights	Don't know yet
🇳🇱	dec '23	12%	35%	34%	17%	2%
	dec '22	12%	35%	35%	17%	2%
🇧🇪	dec '23	16%	39%	31%	11%	2%
	dec '22	18%	36%	31%	11%	3%
🇩🇪	dec '23	9%	36%	37%	15%	2%
	dec '22	8%	35%	41%	14%	2%
🇫🇷	dec '23	8%	43%	29%	17%	3%
	dec '22	9%	41%	29%	17%	4%
🇬🇧	dec '23	13%	47%	28%	10%	2%
	dec '22	11%	45%	31%	10%	3%
🇺🇸	dec '23	19%	52%	19%	7%	2%
	dec '22	22%	48%	20%	7%	3%

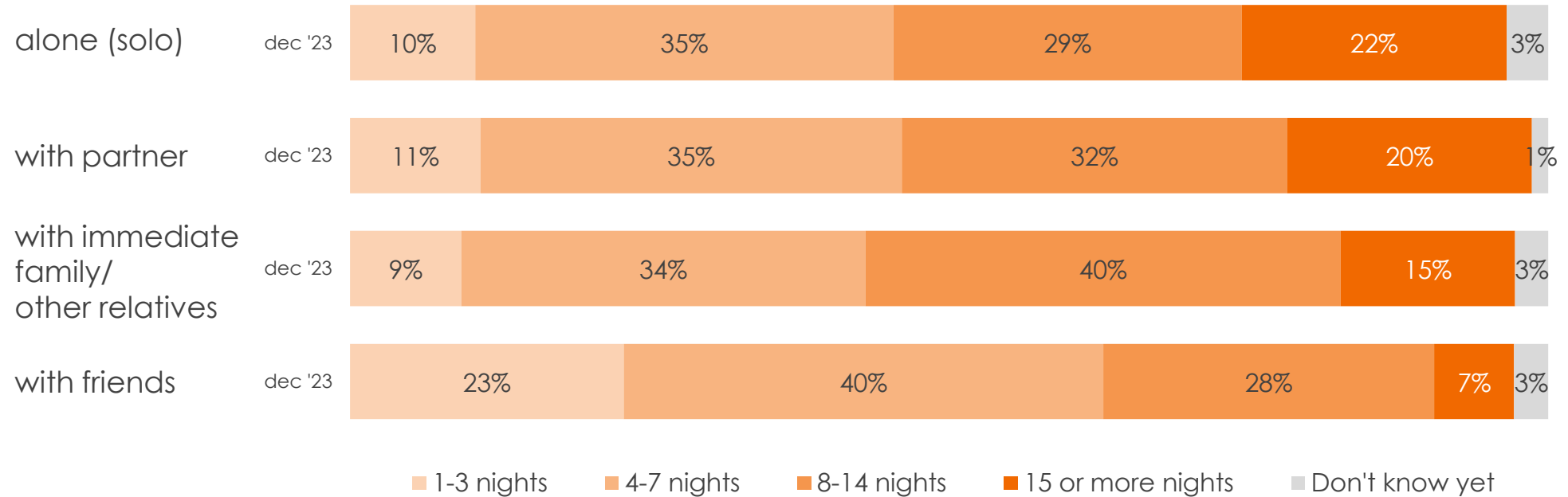■ 1-3 nights   ■ 4-7 nights   ■ 8-14 nights   ■ 15 or more nights   ■ Don't know yet

Base: People with holiday plans for 2024 (booked or yet to book)
(the measurement a year ago asked about 2023)

Q: How long do you plan to be away on your next holiday (in 2024)?
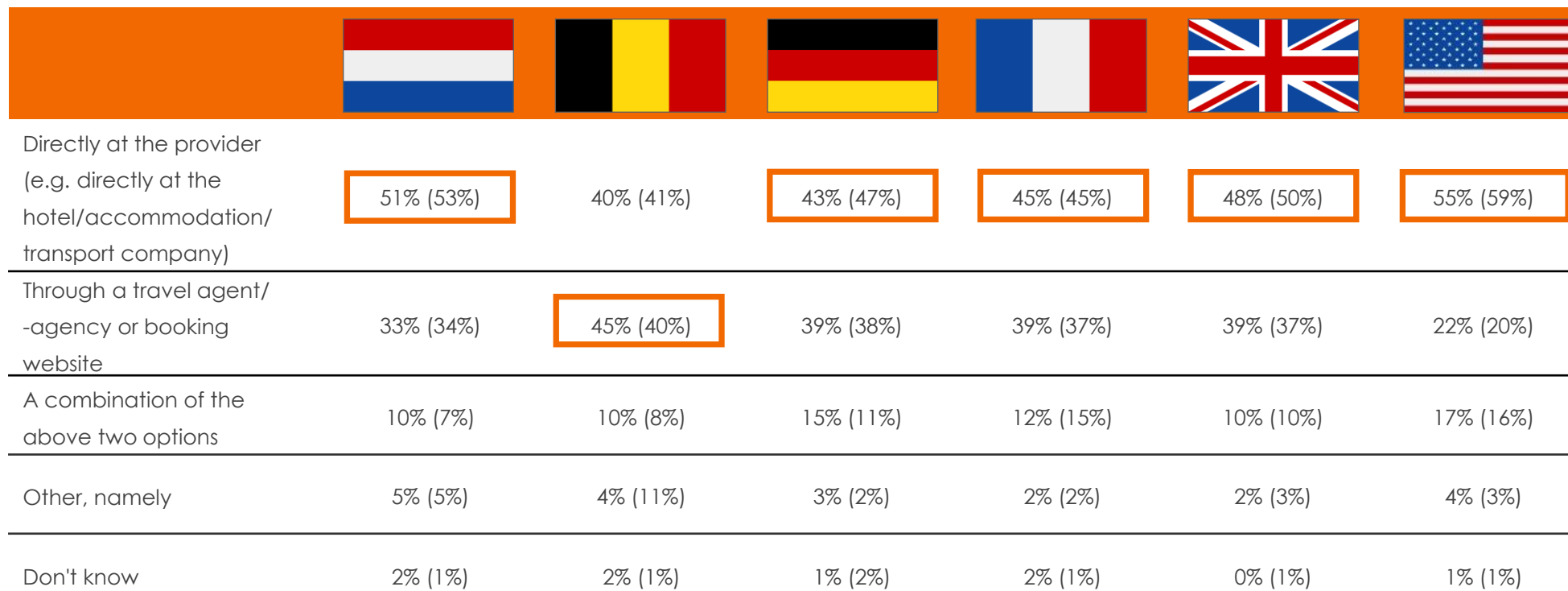
Number of nights

When holidaying with friends, the proportion of shorter holidays is relatively high. A holiday of 15 nights or more is currently most often planned by Dutch people travelling alone (22%). For holidays with immediate family/other relatives, people most often choose holidays of 8-14 nights.

		1-3 nights	4-7 nights	8-14 nights	15 or more nights	Don't know yet
alone (solo)	dec '23	10%	35%	29%	22%	3%
with partner	dec '23	11%	35%	32%	20%	1%
with immediate family/ other relatives	dec '23	9%	34%	40%	15%	3%
with friends	dec '23	23%	40%	28%	7%	3%

■ 1-3 nights   ■ 4-7 nights   ■ 8-14 nights   ■ 15 or more nights   ■ Don't know yet

Base: People with holiday plans for 2024 (booked or yet to book)
Note: the most common travel company types are shown here

Q: How long do you plan to be away on your next holiday (in 2024)?

Number of nights vs. travel companion (NL)

Overall, most bookings for 2024 were made directly with the provider (47% on average). A year ago, this was 50% on average. Most Americans who have already booked a holiday say they did so directly with the provider (55%). Belgians most often book through a travel organisation/booking website (45%).

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Directly at the provider (e.g. directly at the hotel/accommodation/ transport company)	51% (53%)	40% (41%)	43% (47%)	45% (45%)	48% (50%)	55% (59%)
Through a travel agent/ -agency or booking website	33% (34%)	45% (40%)	39% (38%)	39% (37%)	39% (37%)	22% (20%)
A combination of the above two options	10% (7%)	10% (8%)	15% (11%)	12% (15%)	10% (10%)	17% (16%)
Other, namely	5% (5%)	4% (11%)	3% (2%)	2% (2%)	2% (3%)	4% (3%)
Don't know	2% (1%)	2% (1%)	1% (2%)	2% (1%)	0% (1%)	1% (1%)

Among 'other, namely', a private holiday home or (holiday) home of friends/family is mentioned.

Base: People who have already booked holidays for 2024.
Tag: the highest percentage by country.
In brackets the score of the measurement one year ago.

Q: How is your next holiday (in 2024) booked?

How booked

Among those who have already booked a holiday, the next holiday is mostly in January (average 15%), February (average 13%) and April (average 13%). Among the French, many have already booked for July (17%).
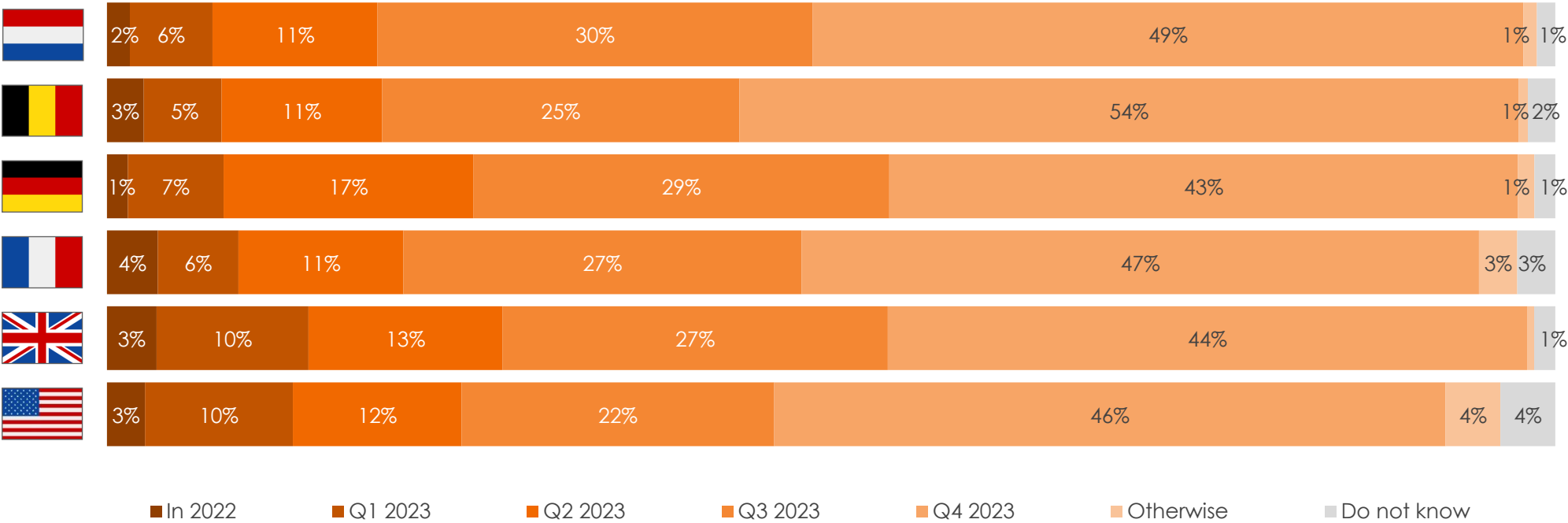
	Netherlands	Belgium	Germany	France	UK	USA
January	14%	15%	12%	12%	13%	21%
February	14%	10%	13%	14%	11%	16%
March	13%	10%	7%	12%	15%	13%
April	13%	13%	14%	11%	12%	13%
May	12%	12%	15%	10%	12%	12%
June	9%	12%	14%	10%	12%	7%
July	13%	15%	9%	17%	10%	6%
August	6%	7%	9%	8%	9%	6%
September	3%	2%	3%	3%	3%	3%
October	1%	2%	1%	1%	2%	1%
November	0%	0%	1%	0%	1%	1%
December	1%	2%	1%	1%	1%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Base: people who have already booked a holiday
Highlight: highest percentage by country

Q: In which month will you leave for your next holiday (in 2024)?

Departure month; holiday already booked

Of those who have already booked holidays for 2024, the largest group did so in Oct/Nov/Dec 2023 (47% on average). An average of 27% also booked in Q3 2023 (July/Aug/Sept).

	In 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Otherwise	Do not know
Netherlands	2%	6%	11%	30%	49%	1%	1%
Belgium	3%	5%	11%	25%	54%	1%	2%
Germany	1%	7%	17%	29%	43%	1%	1%
France	4%	6%	11%	27%	47%	3%	3%
UK	3%	10%	13%	27%	44%		1%
USA	3%	10%	12%	22%	46%	4%	4%

■ In 2022   ■ Q1 2023   ■ Q2 2023   ■ Q3 2023   ■ Q4 2023   ■ Otherwise   ■ Do not know

Base: People who have already booked a holiday for 2024

Q: When did you book your next holiday?

**Booking period of holidays already booked**

On average, 54% have a holiday intention for 2024 but have yet to book. Of this group that has yet to book, on average 59% are planning for a holiday. The most looked at departure months are currently May (average 17%), June (average 15%) and July (average 15%).
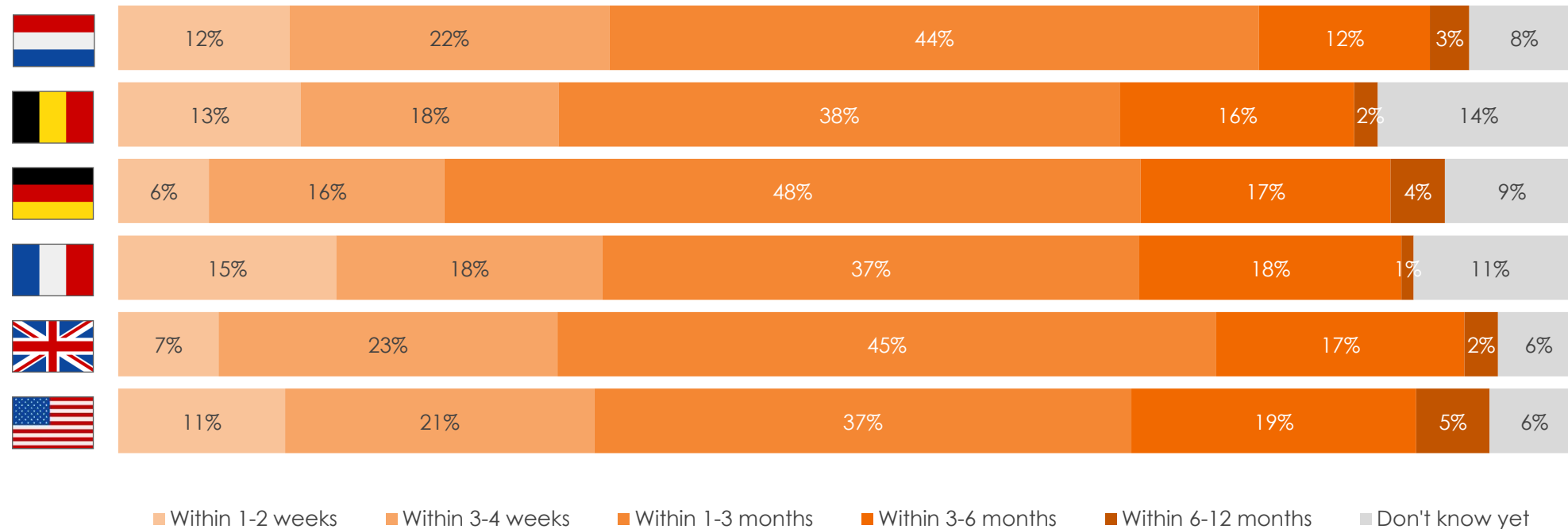
Holiday intention but have yet to book

56%	56%	52%	55%	51%	52%
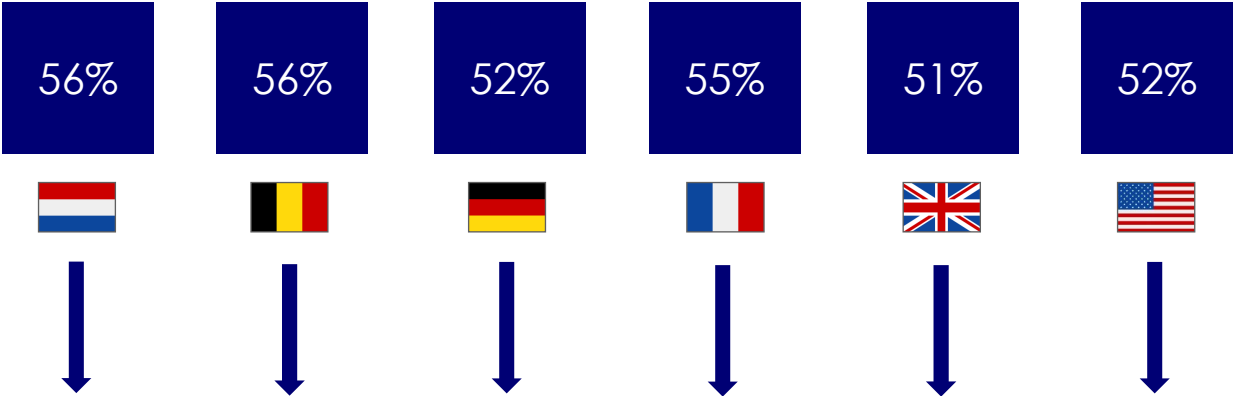
Planning for holidays

55%	51%	69%	60%	57%	64%
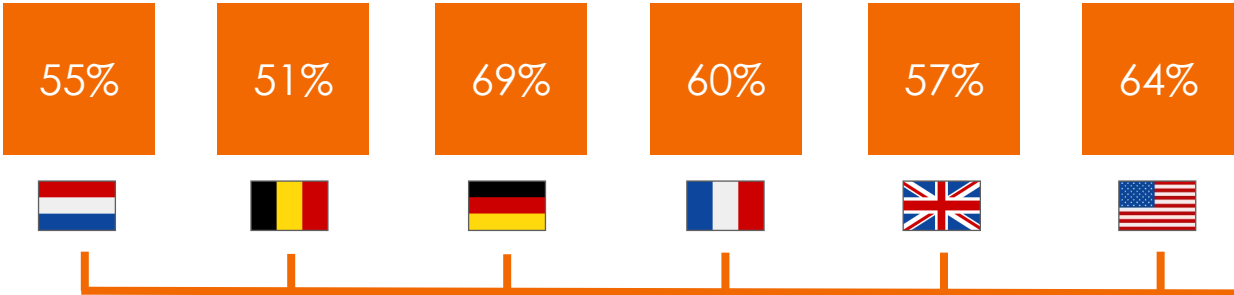
	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Month of departure:						
January	5%	5%	3%	2%	4%	5%
February	8%	6%	5%	14%	6%	12%
March	7%	10%	7%	9%	14%	16%
April	12%	10%	12%	12%	11%	13%
May	**20%**	16%	**18%**	14%	**18%**	**18%**
June	14%	16%	**18%**	10%	**18%**	15%
July	16%	**18%**	14%	**17%**	12%	11%
August	11%	9%	14%	14%	7%	4%
September	4%	7%	7%	5%	4%	3%
October	2%	2%	2%	1%	2%	2%
November	1%	1%	0%	0%	2%	1%
December	1%	1%	0%	1%	1%	1%
Number	**N=333**	**N=312**	**N=403**	**N=362**	**N=306**	**N=359**

Potential holidays

Among those who are planning for a holiday in 2024, the largest group plans to book it within 1 to 3 months (42% on average). In addition, an average of 20% say they plan to book within 3 to 4 weeks, 17% within 3 to 6 months and 11% within 1 to 2 weeks.

Country	Within 1-2 weeks	Within 3-4 weeks	Within 1-3 months	Within 3-6 months	Within 6-12 months	Don't know yet
Netherlands	12%	22%	44%	12%	3%	8%
Belgium	13%	18%	38%	16%	2%	14%
Germany	6%	16%	48%	17%	4%	9%
France	15%	18%	37%	18%	1%	11%
UK	7%	23%	45%	17%	2%	6%
USA	11%	21%	37%	19%	5%	6%

Base: People who have yet to book holidays but are already planning

Question: When do you plan to book the holiday you are planning on?

Planning to book

On average, 59% of the people who have not yet booked, but do intend to go on holiday in 2024, are already planning their upcoming holiday. If people have a holiday intention but are not yet planning, it is mainly because they have not got around to it yet (average 26%) or their financial situation does not allow it (average 8%).

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Yes	55%	51%	69%	60%	57%	64%
No, I haven't got around to planning yet	33%	33%	17%	25%	29%	22%
No, my financial situation does not allow it (e.g. due to inflation and rising prices)	8%	10%	8%	8%	8%	10%
No, because of uncertainties surrounding current wars	3%	5%	5%	5%	4%	3%
No, for another reason	2%	1%	1%	1%	2%	2%

Base: People who have not yet booked (but have holiday intentions for 2024)

Q: Are you already planning for your upcoming holiday?

To plan or not to plan

In 2024, the Dutch plan to spend their next holiday in their own country less than they did a year ago. This is also true for the French and Americans. Most Dutch and Belgians plan to spend their next holiday (elsewhere) in Europe. However, many French and American respondents are planning to holiday in their own country.

Netherlands

	dec '22	dec '23
Don't know yet	2%	4% *
Africa	3%	3%
Asia	5%	5%
North/South America	7%	6%
Europe	55%	62% *
Own country	27%	20% *

Belgium

	dec '22	dec '23
Don't know yet	4%	4%
Africa	4%	4%
Asia	3%	4%
North/South America	4%	4%
Europe	66%	67%
Own country	18%	15%

Germany

	dec '22	dec '23
Don't know yet	5%	5%
Africa	3%	3%
Asia	6%	8%
North/South America	6%	6%
Europe	51%	50%
Own country	28%	27%

France

	dec '22	dec '23
Don't know yet	3%	5%
Africa	6%	6%
Asia	5%	5%
North/South America	6%	6%
Europe	29%	32%
Own country	51%	46% *

UK

	dec '22	dec '23
Don't know yet	5%	4% *
Africa	2%	3%
Asia	7%	8%
North/South America	10%	7% *
Europe	47%	49%
Own country	27%	26%

USA

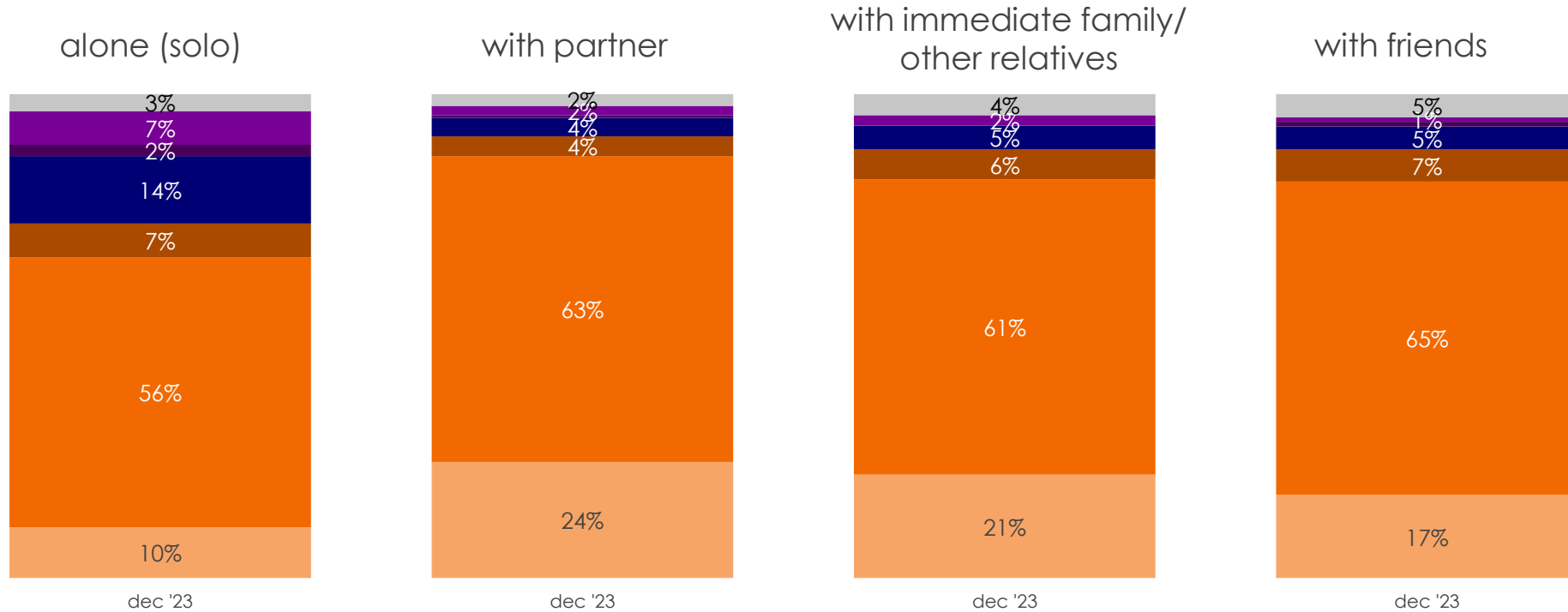|	dec '22	dec '23
Don't know yet	5%	6%
Africa		2%
Asia	3%	3%
North/South America	14%	9%
Europe		15%
Own country	68%	63% *

Legend: ■ Own country ■ Europe ■ North/South America ■ Asia ■ Australia/Oceania ■ Africa ■ Don't know yet

Base: People with holiday plans in 2024 (booked or have yet to book).
(A year ago, people were asked about plans for 2023)
*: significant difference compared to the measurement 1 year ago

Questionnaire: In which destination do you plan to spend your next holiday (in 2024) mainly?

Region/continent

Dutch people going on holiday alone are more likely to plan to visit another continent than the other three groups (with partner, family or friends). In particular, Asia is chosen often. Of these four groups, Dutch couples (with partner) most often plan to spend their next holiday in the Netherlands (24%).
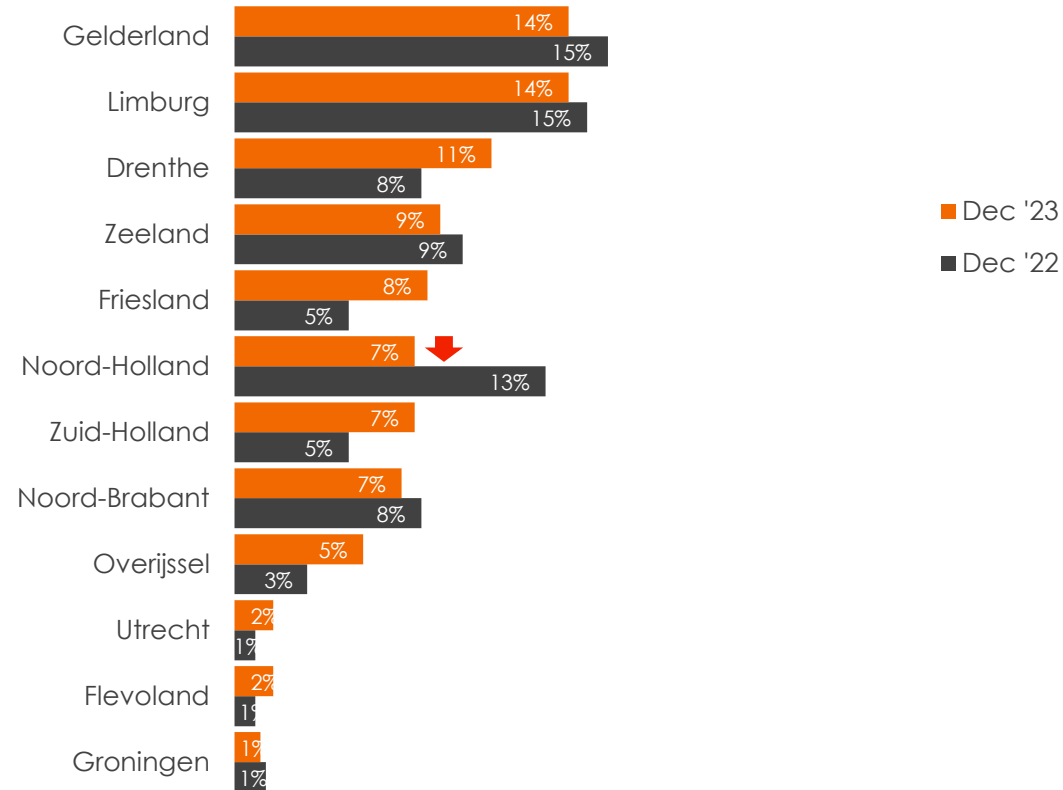
alone (solo)	with partner	with immediate family/ other relatives	with friends

alone (solo):
- 3%
- 7%
- 2%
- 14%
- 7%
- 56%
- 10%

with partner:
- 2%
- 2%
- 4%
- 4%
- 63%
- 24%

with immediate family/other relatives:
- 4%
- 2%
- 5%
- 6%
- 61%
- 21%

with friends:
- 5%
- 1%
- 5%
- 7%
- 65%
- 17%

dec '23 — dec '23 — dec '23 — dec '23

Legend: ■ Own country ■ Europe ■ North/South America ■ Asia ■ Australia/Oceania ■ Africa ■ Don't know yet

Base: Dutch with holiday plans in 2024 (booked or yet to book)
Note: the most common travel company types are shown here

Questionnaire: In which destination do you plan to spend your next holiday (in 2024) mainly?

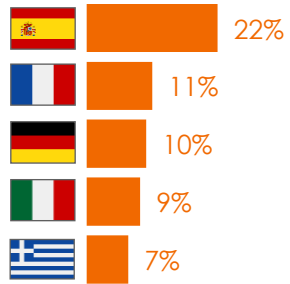# Region/continent vs. travel companion (NL)

Dutch people who want to spend their next holiday in the Netherlands in 2024 say they want to do so most in Gelderland and Limburg (both 14%). This is followed by Drenthe with 11%. Compared to a year ago, plans for a holiday/weekend break in Noord-Holland have decreased.

Legend:
- Dec '23 (orange)
- Dec '22 (dark)

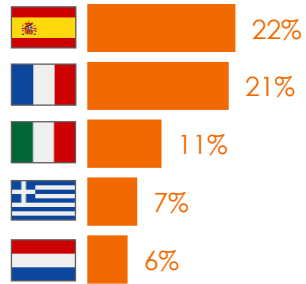| Province	Dec '23	Dec '22
Gelderland	14%	15%
Limburg	14%	15%
Drenthe	11%	8%
Zeeland	9%	9%
Friesland	8%	5%
Noord-Holland	7%	13%
Zuid-Holland	7%	5%
Noord-Brabant	7%	8%
Overijssel	5%	3%
Utrecht	2%	1%
Flevoland	2%	1%
Groningen	1%	1%

Base: Dutch people with holiday plans in the Netherlands (booked or yet to book)
Arrow: significant difference compared to a year ago

Question: In which province do you plan to spend your next holiday in 2024 (in the Netherlands) mainly?
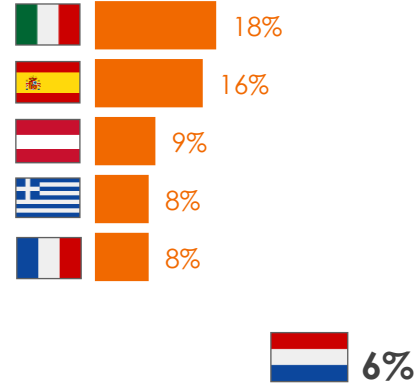
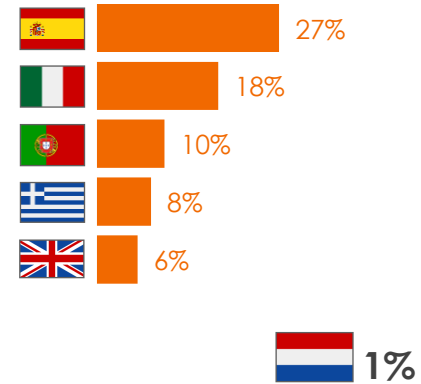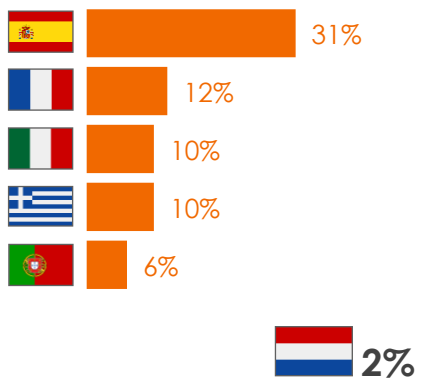# Destination province of Dutch holidaymakers

Top 5 European destinations

NETHERLANDS
- Spain — 22%
- France — 11%
- Germany — 10%
- Italy — 9%
- Greece — 7%

BELGIUM
- Spain — 22%
- France — 21%
- Italy — 11%
- Greece — 7%
- Netherlands — 6%

GERMANY
- Italy — 18%
- Spain — 16%
- Austria — 9%
- Greece — 8%
- France — 8%
- Netherlands — 6%

FRANCE
- Spain — 27%
- Italy — 18%
- Portugal — 10%
- Greece — 8%
- UK — 6%
- Netherlands — 1%

UK
- Spain — 31%
- France — 12%
- Italy — 10%
- Greece — 10%
- Portugal — 6%
- Netherlands — 2%

US
- France — 18%
- Spain — 15%
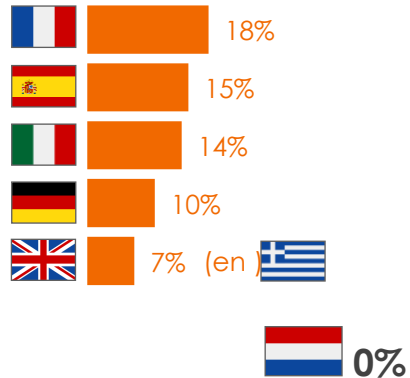- Italy — 14%
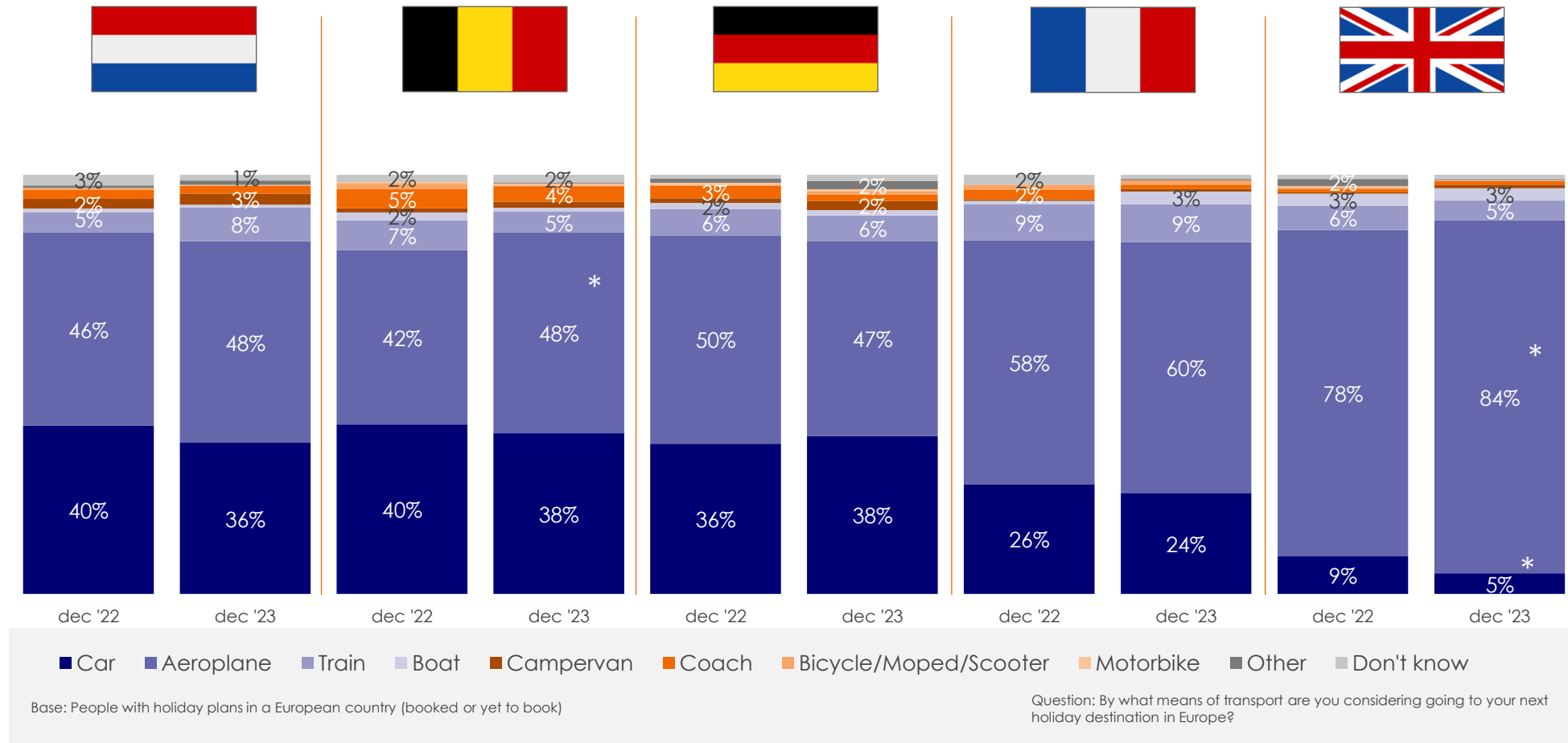- Germany — 10%
- UK — 7% (en) Greece
- Netherlands — 0%

- Spain is the most popular European holiday country. In all six countries, Spain is in the top five; in four countries even in first place. Spain is a favourite among the Dutch, Belgians, French and British.

- Among Belgians, France is also popular. The Netherlands currently ranks fifth among Belgians.

- Among Germans, the Netherlands is not currently in the top 5 for a European holiday in the coming months, but even so, 6% say they would choose the Netherlands.

- Like Spain, Italy appears in the top five of all six countries. Among Germans, it is now the number one destination.

- Greece is also popular and features in every top five.

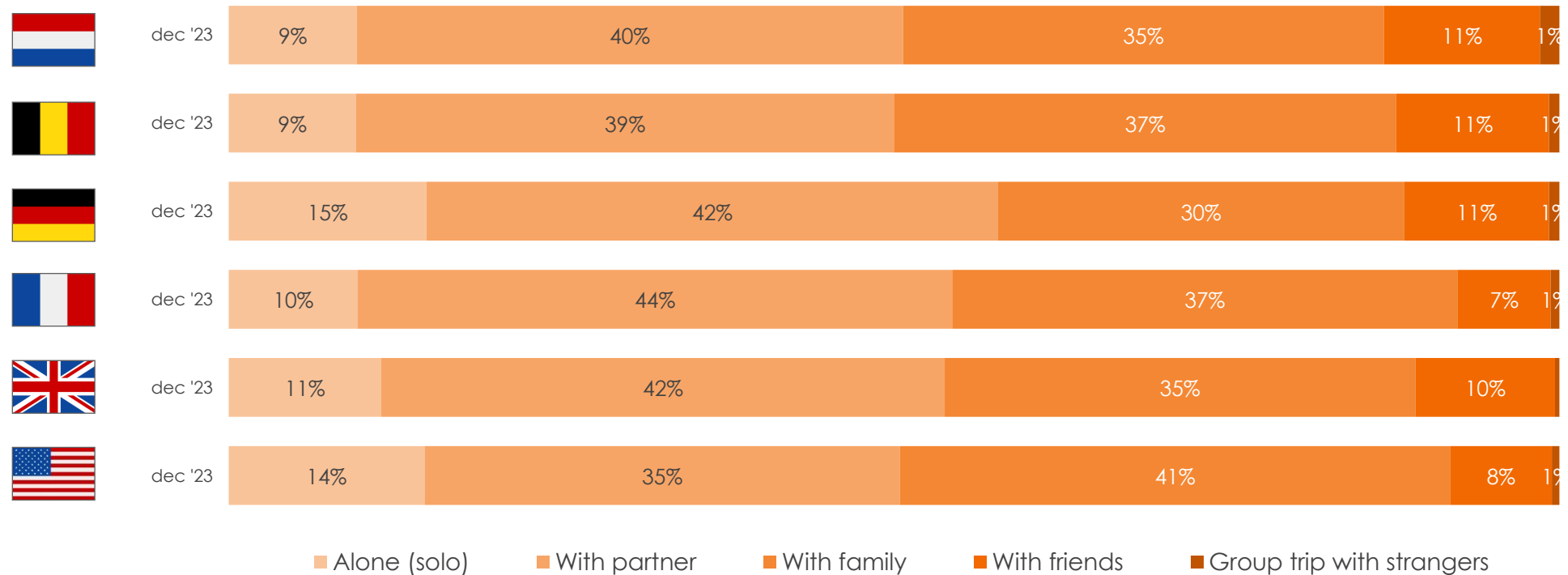Base: People with holiday plans in Europe (booked or has yet to book)

Questionnaire: Where in Europe do you plan to spend your next holiday mainly?

In all five countries, the plane is the most chosen means of transport for the next holiday in Europe (average 56%). A year ago, this was 53% on average. Among the Dutch, Belgians and Germans, the car also scores relatively high. Furthermore, a relatively high number of French respondents are considering travelling by train. Among Dutch people, this share (train) has increased compared to last year.

	Netherlands		Belgium		Germany		France		United Kingdom	
	dec '22	dec '23	dec '22	dec '23	dec '22	dec '23	dec '22	dec '23	dec '22	dec '23
Other/Don't know	3%	1%	2%	2%		2%	2%		2%	
Coach	2%	3%	5%	4%	3%	2%	2%	3%	3%	3%
Train	5%	8%	7%	5%	6%	6%	9%	9%	6%	5%
Aeroplane	46%	48%	42%	48%*	50%	47%	58%	60%	78%	84%*
Car	40%	36%	40%	38%	36%	38%	26%	24%	9%	5%*

Legend: ■ Car ■ Aeroplane ■ Train ■ Boat ■ Campervan ■ Coach ■ Bicycle/Moped/Scooter ■ Motorbike ■ Other ■ Don't know

Base: People with holiday plans in a European country (booked or yet to book)

Question: By what means of transport are you considering going to your next holiday destination in Europe?

Means of transport on European holidays

On average, the largest group goes on holiday with their partner (average 40%), followed by a holiday with immediate family/other relatives (average 36%). Furthermore, on average 11% have plans for a solo trip and 10% for a holiday/trip with one or more friends.

Country	dec '23	Alone (solo)	With partner	With family	With friends	Group trip with strangers
Netherlands	dec '23	9%	40%	35%	11%	1%
Belgium	dec '23	9%	39%	37%	11%	1%
Germany	dec '23	15%	42%	30%	11%	1%
France	dec '23	10%	44%	37%	7%	1%
UK	dec '23	11%	42%	35%	10%	
USA	dec '23	14%	35%	41%	8%	1%

■ Alone (solo) ■ With partner ■ With family ■ With friends ■ Group trip with strangers

Base: People with holiday plans for 2024 (booked or yet to book)

Q: With which travel company do you plan to take your next holiday (in 2024)?

Travel companion

A hotel/guesthouse is the most popular type of accommodation (average 48%). This is followed by an apartment (average 12%) and renting accommodation from a private person (average 8%). Renting from private individuals is most popular among the French. Among the Dutch, a bungalow (park) and camping score fairly high.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Hotel/guesthouse	43%	48%	52%	35%	52%	57%
Bed and breakfast	4%	7%	4%	7%	6%	4%
Apartment	14%	12%	20%	12%	9%	2%
Bungalow(park)	10%	6%	2%	6%	2%	0%
Campsite	9%	5%	4%	9%	3%	4%
Group accommodation	2%	1%	1%	1%	1%	1%
With a private individual (e.g. Airbnb)	6%	7%	4%	14%	9%	9%
Boat	1%	1%	2%	1%	2%	5%
Second home	1%	2%	1%	3%	1%	1%
Residence of family/friends/other relatives	5%	7%	6%	8%	9%	10%
Other	2%	1%	1%	1%	3%	2%

Base: People with holiday plans for 2024 (booked or yet to book)
Highlight: 3 highest scores per country

Questionnaire: What type of accommodation do you plan to stay in during your next holiday in 2024?

Type of accommodation

Beach holidays are the most frequently planned (average 23%). This is followed by holidays with friends/family (13%), nature holidays (11%) and city trips (9%). Additionally, for the Dutch, a touring holiday has a relatively high score and for Americans, a cruise.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Winter sports holiday	4%	3%	2%	6%	1%	1%
Beach holiday	**18%**	**23%**	**26%**	**25%**	**24%**	**18%**
Water sports holiday	1%	0%	1%	1%	1%	0%
Walking holiday	4%	7%	4%	2%	2%	2%
Cycling holiday	2%	1%	1%	0%	0%	0%
Other type of active holiday	2%	2%	1%	2%	3%	3%
Tour	**7%**	5%	**6%**	2%	4%	3%
Cruise	1%	1%	2%	1%	4%	**9%**
Visiting event	2%	2%	1%	2%	4%	4%
City break	**10%**	**7%**	**12%**	**8%**	**12%**	**7%**
Cultural holidays	6%	**9%**	6%	**9%**	5%	5%
Visiting friends/family/etc	6%	6%	**7%**	7%	**9%**	**14%**
Nature holiday	**11%**	**13%**	**16%**	**15%**	**5%**	7%
Wellness holidays	4%	3%	5%	1%	3%	3%
Holidays with friends/family/etc	**13%**	**11%**	2%	**13%**	**18%**	**17%**
Culinary holidays	1%	2%	2%	1%	1%	1%
Shopping holiday	1%	1%	2%	2%	1%	2%
Volunteer	0%	0%	0%	1%	0%	1%
Otherwise	5%	3%	3%	2%	4%	3%

Base: People with holiday plans for 2024 (booked or yet to book)
Highlight: 5 highest scores per country

Q: How would you characterise your next holiday?

Type of holiday

On average, flexible cancellation conditions matter most when choosing a holiday destination (on average 72% consider this (very) important). This is followed closely by the aspect of 'staying in a quiet place' (average 71%) and then 'rising prices' (average 65%). For the Dutch, the importance of flexible cancellation conditions is a lot lower than for the other countries.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Flexible cancellation conditions	**63%**	**69%**	**77%**	**77%**	**71%**	**73%**
Destination close to home	27%	36%	40%	41%	29%	34%
Stay in quiet place	**67%**	**78%**	**74%**	**83%**	**58%**	**67%**
Development of the war in Ukraine	32%	41%	41%	44%	38%	36%
Development of the conflict in Israel and Palestinian territories	31%	42%	43%	47%	39%	39%
Rising prices (fuel, energy, inflation)	**52%**	**65%**	**66%**	**77%**	**61%**	**69%**
Crowds at airports	39%	39%	43%	47%	47%	48%
Sustainability (minimising environmental impact)	40%	50%	52%	58%	47%	46%

Base: People with holiday plans for 2024 (booked or yet to book).
Percentage: top 2 (very important + important).
Highlighting: the three highest scores of each country are in bold.

Question: How important are these aspects to you in your holiday destination choice?

Considerations for choice of holiday destination

People with a holiday intention in 2024 expect to spend their longest holiday of the year mostly in July and August (19% and 18% respectively). Among Americans, June is the departure month most often chosen for the longest holiday.

	Netherlands	Belgium	Germany	France	UK	USA
January	2%	2%	2%	2%	3%	5%
February	3%	3%	3%	3%	3%	8%
March	4%	4%	3%	3%	4%	7%
April	5%	6%	7%	5%	6%	10%
May	12%	11%	11%	7%	13%	11%
June	14%	14%	15%	13%	15%	15%
July	19%	24%	17%	26%	15%	13%
August	21%	19%	20%	24%	16%	9%
September	11%	11%	14%	10%	12%	7%
October	3%	3%	3%	2%	5%	4%
November	1%	1%	1%	0%	3%	3%
December	1%	1%	0%	1%	1%	2%
I don't know yet	4%	3%	4%	3%	4%	5%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Base: People with a holiday intention for 2024 (booked or yet to book)
Highlight: highest percentage by country

Q: In which month do you expect to spend your longest holiday of the year (in 2024)?
If the holiday falls in more than one month, select the month of departure.

Departure month of longest 2024 holiday

On average, 16% expect corona to influence their choice of holiday destination in 2024. This score is lowest in the Netherlands (11%) and highest in the United States (21%). The average has dropped considerably compared to a year ago, when it was 28%.

I expect corona to influence my choice of holiday destination in 2024

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Top 2 Dec '23	Dec '22
🇳🇱	2%	9%	17%	31%	37%	3%	**11%**	**18%**
🇧🇪	3%	9%	25%	29%	30%	3%	**12%**	**25%**
🇩🇪	5%	10%	20%	26%	35%	3%	**16%**	**26%**
🇫🇷	5%	16%	24%	24%	27%	4%	**20%**	**37%**
🇬🇧	5%	12%	22%	27%	31%	2%	**17%**	**30%**
🇺🇸	6%	14%	19%	27%	30%	3%	**21%**	**34%**

■ Totally agree   ■ Agree   ■ Do not agree, do not disagree   ■ Disagree   ■ Totally disagree   ■ Don't know
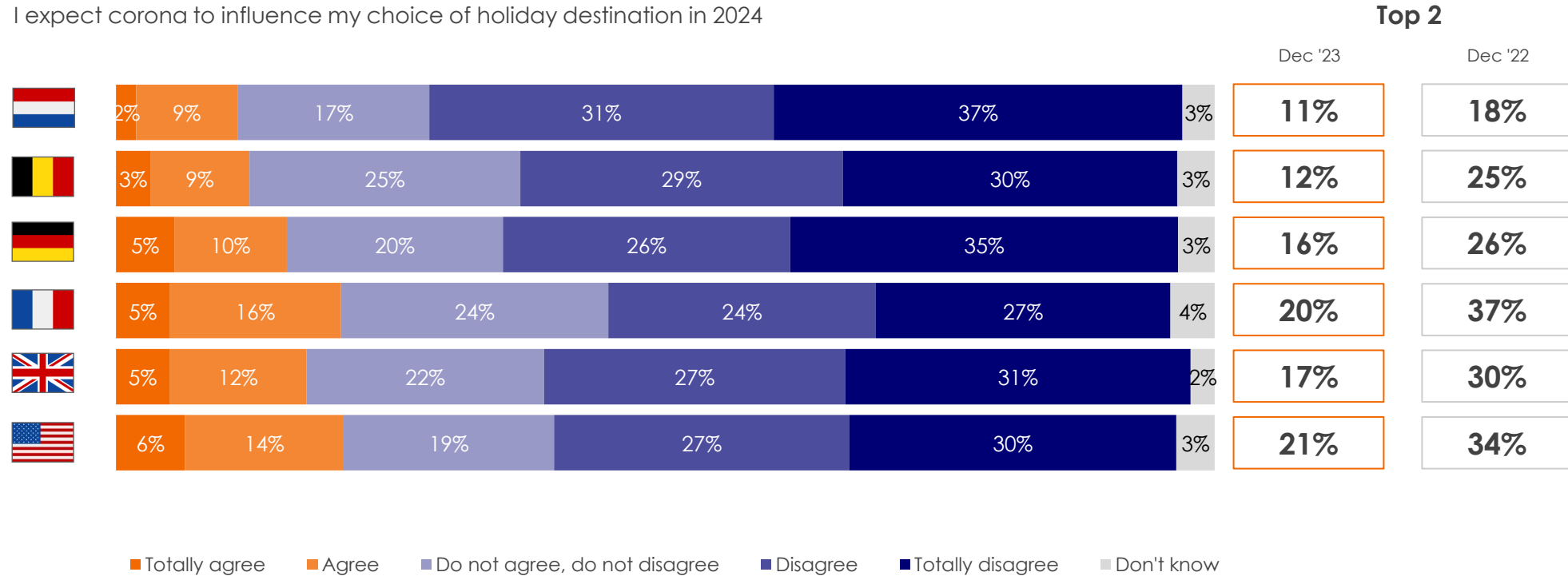
Base: everyone (entire sample)
Rounding differences may occur at the top 2%.
A year ago, it asked about 2023.

Influence of corona on choice of holiday destination

On average, 30% are looking at alternative travel options for their holidays because of possible crowding at airports. A year ago, this was 32%. Among Dutch people, this percentage did drop significantly over the past year, from 38% to 28%.

Due to possible crowding at airports, I am looking at alternative travel options for my holiday

Top 2

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Dec '23	Dec '22
🇳🇱	6%	22%	24%	25%	19%	3%	**28%**	**38%**
🇧🇪	7%	21%	27%	23%	18%	4%	**28%**	**27%**
🇩🇪	9%	18%	26%	19%	25%	4%	**27%**	**33%**
🇫🇷	10%	23%	25%	18%	18%	6%	**32%**	**34%**
🇬🇧	9%	20%	22%	28%	20%	2%	**28%**	**27%**
🇺🇸	11%	24%	22%	22%	19%	2%	**35%**	**34%**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

Crowds at airports
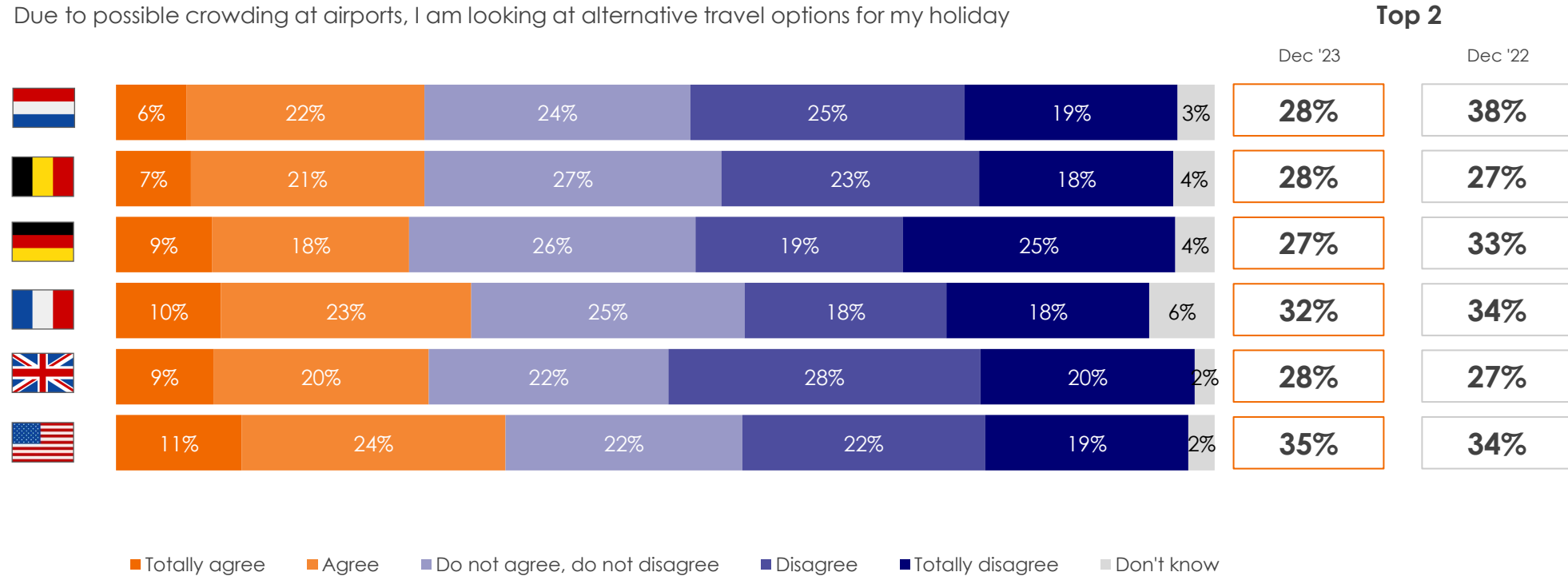
About half (49%) of those surveyed agree with the statement 'I think it is important to take the environment into account when booking my holiday'. This average is exactly the same as a year ago. Of the six countries below, the Dutch agree least with this statement and the French agree most.

I think it is important to consider the environment when booking my holiday
(e.g. choice of means of transport, destination, accommodation)

						Top 2	
						Dec '23	Dec '22
🇳🇱	9%	28%	34%	16%	11%	2%	**37%**	**40%**
🇧🇪	9%	34%	35%	14%	6%	2%	**43%**	**46%**
🇩🇪	14%	32%	32%	11%	10%	2%	**46%**	**47%**
🇫🇷	18%	39%	23%	9%	7%	2%	**58%**	**62%**
🇬🇧	14%	42%	27%	10%	7%	%	**56%**	**53%**
🇺🇸	18%	35%	23%	11%	11%	1%	**53%**	**49%**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know
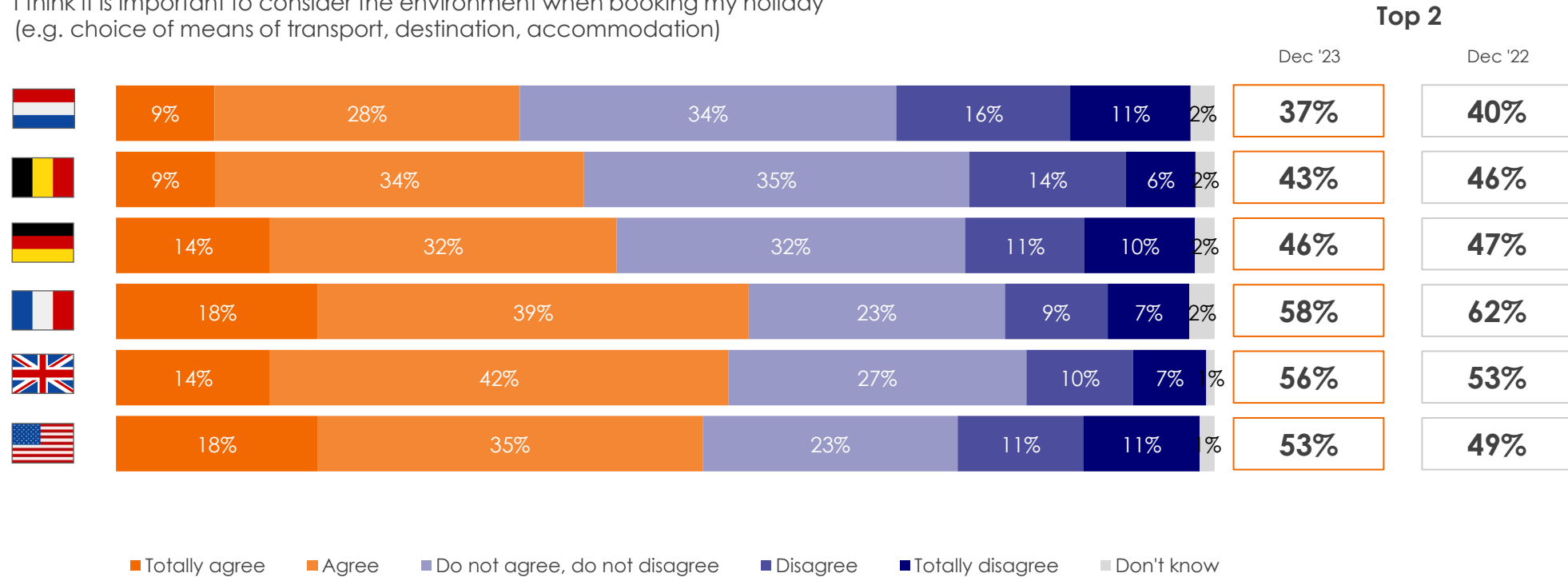
Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

On average, 39% of those surveyed agree with the statement that increasing extreme weather conditions influence holiday choices. At the end of August, this average was 46%. French people are in highest agreement with this statement.

Increasing extreme weather conditions (e.g. heat waves, forest fires or extreme rainfall) influence my choice of holidays

Top 2

		Dec '23	Aug '23
🇳🇱	6% | 29% | 27% | 24% | 13% | %	**35%**	**44%**
🇧🇪	8% | 31% | 29% | 21% | 10% | %	**39%**	**47%**
🇩🇪	10% | 24% | 29% | 18% | 16% | 2%	**34%**	**40%**
🇫🇷	14% | 34% | 25% | 15% | 11% | 2%	**48%**	**52%**
🇬🇧	8% | 30% | 24% | 23% | 14% | 2%	**38%**	**47%**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

Extreme weather
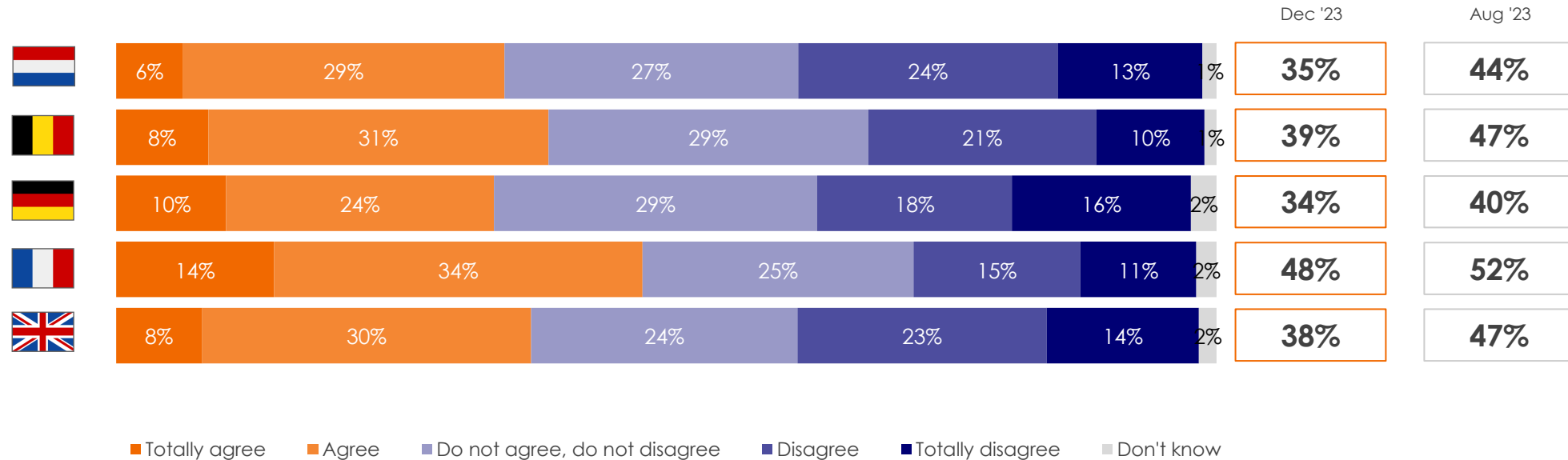
About a quarter (23%) of those surveyed say the war in Ukraine affects their choice of holiday destination. A year ago, this was 27% on average. The top2 scores currently range from 19% among the Dutch to 25% among the British.

War in Ukraine affects my holiday destination choice

Top 2

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Dec '23	Dec '22
🇳🇱	4%	15%	21%	31%	27%	2%	**19%**	**26%**
🇧🇪	6%	18%	26%	25%	22%	2%	**24%**	**29%**
🇩🇪	8%	17%	21%	25%	27%	2%	**24%**	**29%**
🇫🇷	7%	17%	23%	21%	28%	4%	**24%**	**27%**
🇬🇧	5%	20%	21%	27%	26%	2%	**25%**	**27%**
🇺🇸	7%	14%	20%	25%	31%	3%	**21%**	**22%**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know
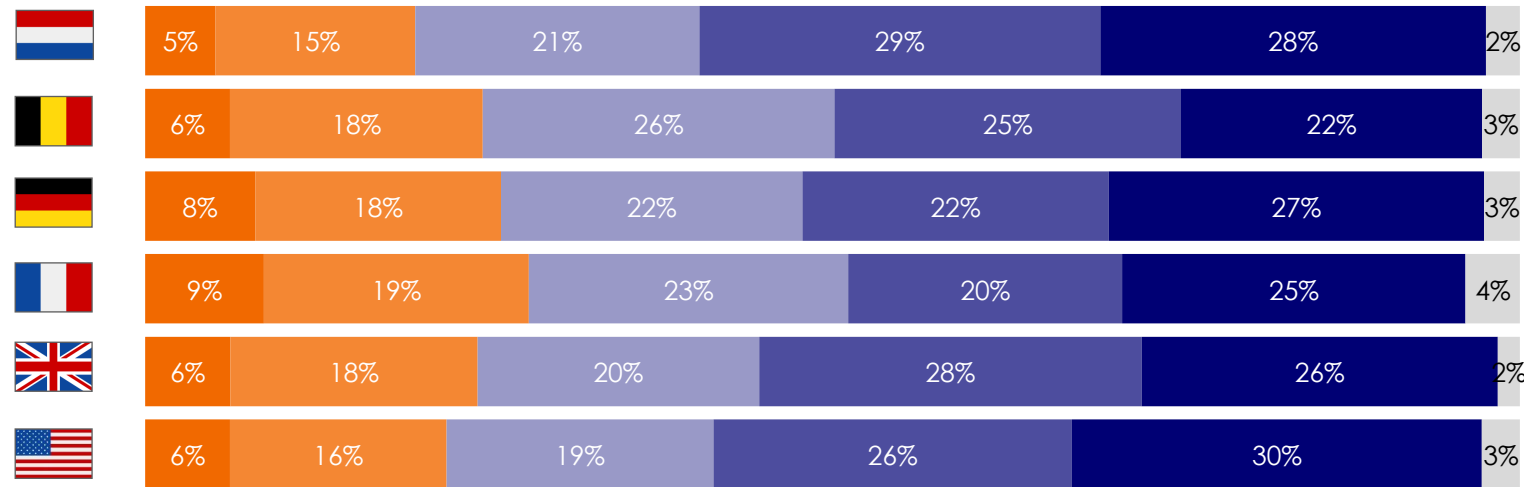
Base: everyone (entire sample)
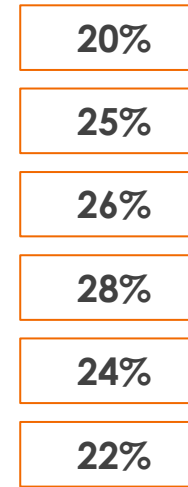Rounding differences may occur at the top 2%.

Ukraine
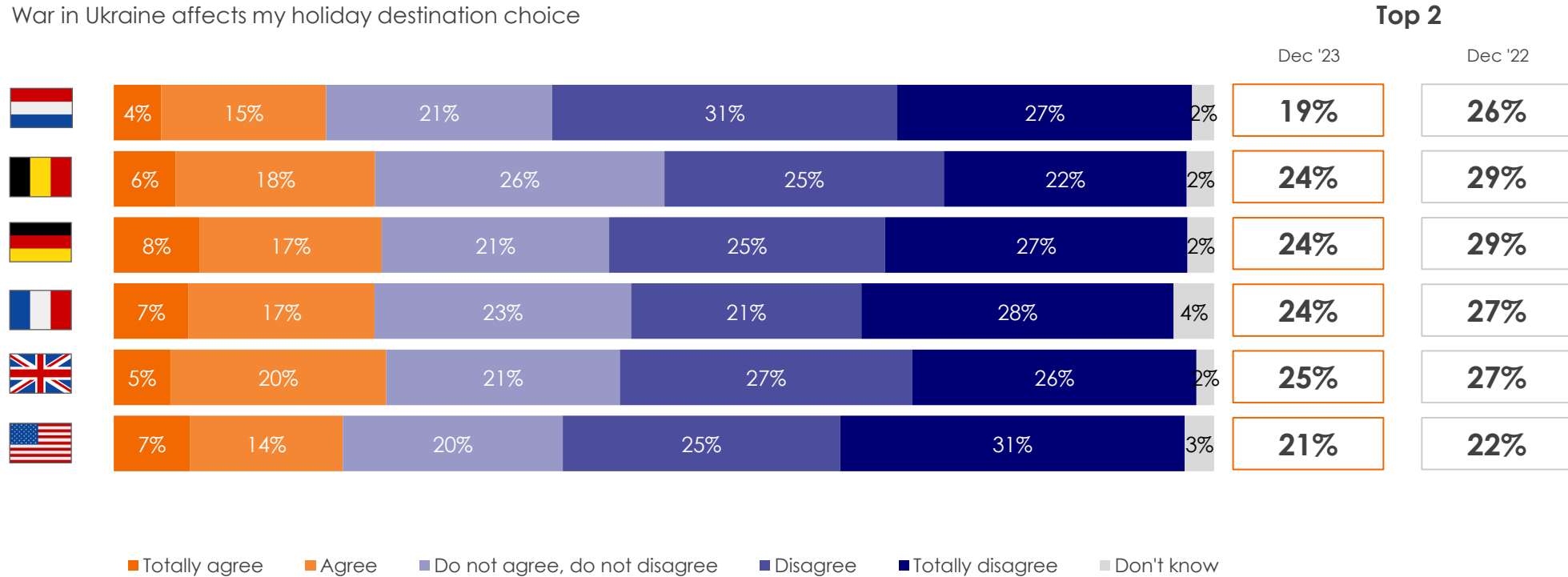
Around a quarter (24%) of those surveyed also indicated that the conflict in Israel and Palestinian territories affects their choice of holiday destination. The top2 scores currently range from 20% among the Dutch to 28% among the French.

The conflict in Israel and Palestinian territories affects my choice of holiday destination

Top 2

Dec '23

Flag	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Top 2
🇳🇱	5%	15%	21%	29%	28%	2%	**20%**
🇧🇪	6%	18%	26%	25%	22%	3%	**25%**
🇩🇪	8%	18%	22%	22%	27%	3%	**26%**
🇫🇷	9%	19%	23%	20%	25%	4%	**28%**
🇬🇧	6%	18%	20%	28%	26%	2%	**24%**
🇺🇸	6%	16%	19%	26%	30%	3%	**22%**

■ Totally agree   ■ Agree   ■ Do not agree, do not disagree   ■ Disagree   ■ Totally disagree   ■ Don't know

Base: everyone (entire sample)
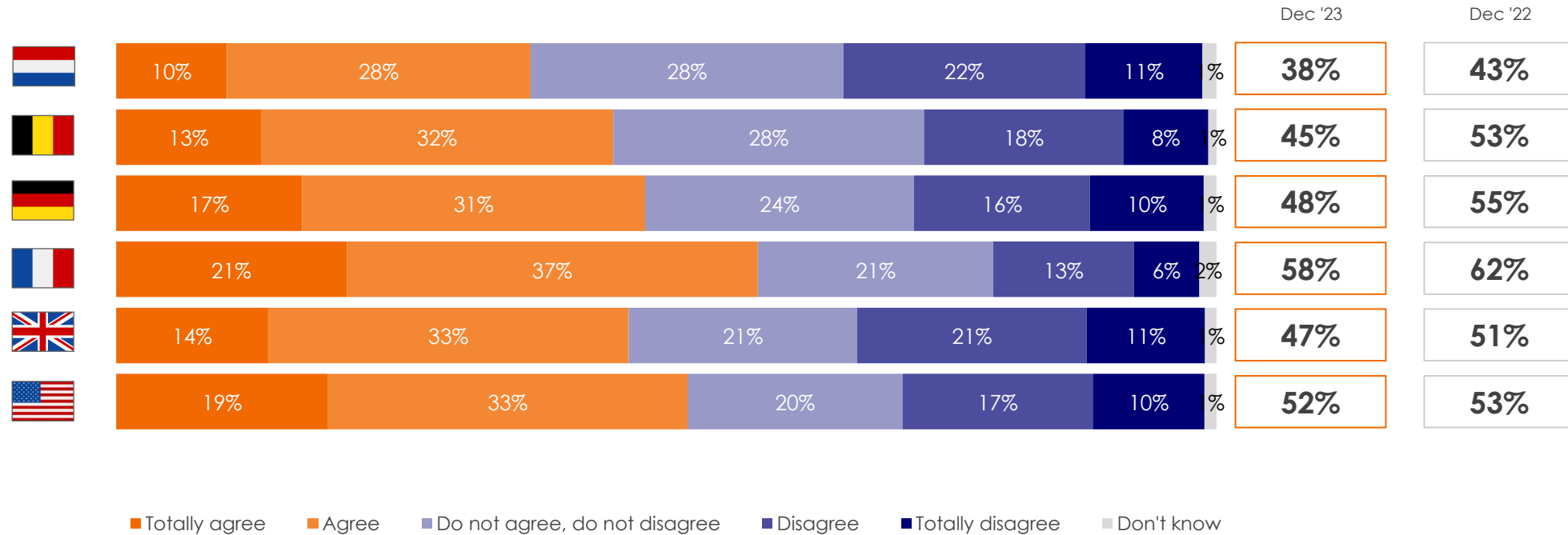Rounding differences may occur at the top 2%.

The conflict in Israel and Palestinian territories

33

2. Influence of rising prices on holiday plans

Just under half (48% on average) say they are forced to adjust holiday behaviour as a result of rising prices. A year ago, this was 53% on average. The French are still in highest agreement with this statement (58%) and the Dutch the least (38%).

Rising prices (fuel, gas/energy, groceries, etc.) have forced me to adjust my holiday behaviour

Top 2

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Dec '23	Dec '22
🇳🇱	10%	28%	28%	22%	11%	%	**38%**	**43%**
🇧🇪	13%	32%	28%	18%	8%	%	**45%**	**53%**
🇩🇪	17%	31%	24%	16%	10%	%	**48%**	**55%**
🇫🇷	21%	37%	21%	13%	6%	2%	**58%**	**62%**
🇬🇧	14%	33%	21%	21%	11%	%	**47%**	**51%**
🇺🇸	19%	33%	20%	17%	10%	%	**52%**	**53%**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

Rising prices

In December 2023, people indicate that if they change their holiday behaviour (due to higher prices), they do so mainly by going on holiday less often (44% on average) and/or choosing cheaper accommodation (42% on average). The least chosen options are avoiding the high season (mean 25%) and saving on transport (mean 20%).

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Shorter holidays	26%	28%	26%	30%	**31%**	**38%**
Less frequent holidays	**41%**	**42%**	**45%**	**44%**	**46%**	**44%**
Cheaper accommodation	**38%**	**41%**	**47%**	**36%**	**48%**	**41%**
Cheaper transport	18%	16%	19%	17%	22%	26%
Save at destination itself	**34%**	28%	**31%**	**34%**	27%	34%
Avoiding the high season	27%	**29%**	26%	22%	25%	23%
Other, namely	4%	3%	2%	1%	2%	5%

Base: People who (totally) agree with the statement 'Rising prices (fuel, gas/energy, groceries, etc.) are forcing me to adjust my holiday behaviour'
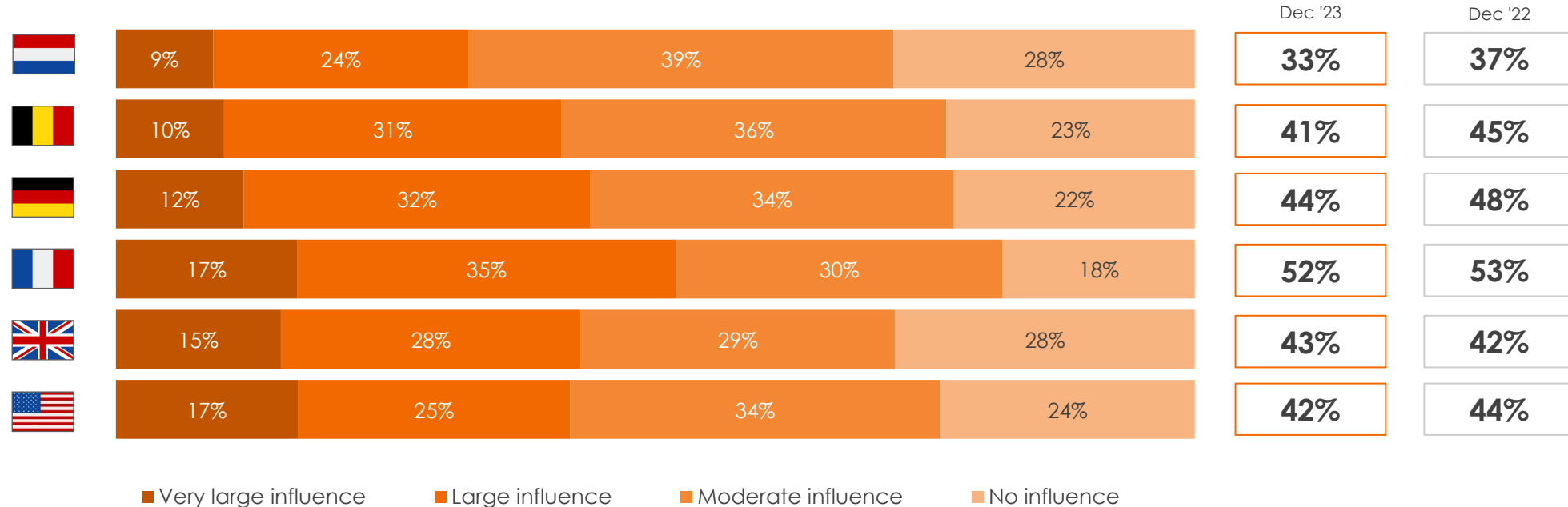Highlighting: the three highest scores from each country are in bold

Questionnaire: In what ways do you mainly adjust your holiday behaviour as a result of rising prices? Multiple answers possible (max. 3).

Holiday behaviour adjustment

Of those who have holiday intentions but have not yet booked, 42% on average say that rising prices have a (very) big influence on this. A year ago, this was 45% on average. The top2 scores currently range from 33% among the Dutch to 52% among the French.

To what extent do rising prices (fuel, gas/energy, groceries, etc.) have to do with the fact that you have not yet booked a holiday for 2024?

Top 2

	Very large influence	Large influence	Moderate influence	No influence	Dec '23	Dec '22
🇳🇱	9%	24%	39%	28%	**33%**	**37%**
🇧🇪	10%	31%	36%	23%	**41%**	**45%**
🇩🇪	12%	32%	34%	22%	**44%**	**48%**
🇫🇷	17%	35%	30%	18%	**52%**	**53%**
🇬🇧	15%	28%	29%	28%	**43%**	**42%**
🇺🇸	17%	25%	34%	24%	**42%**	**44%**

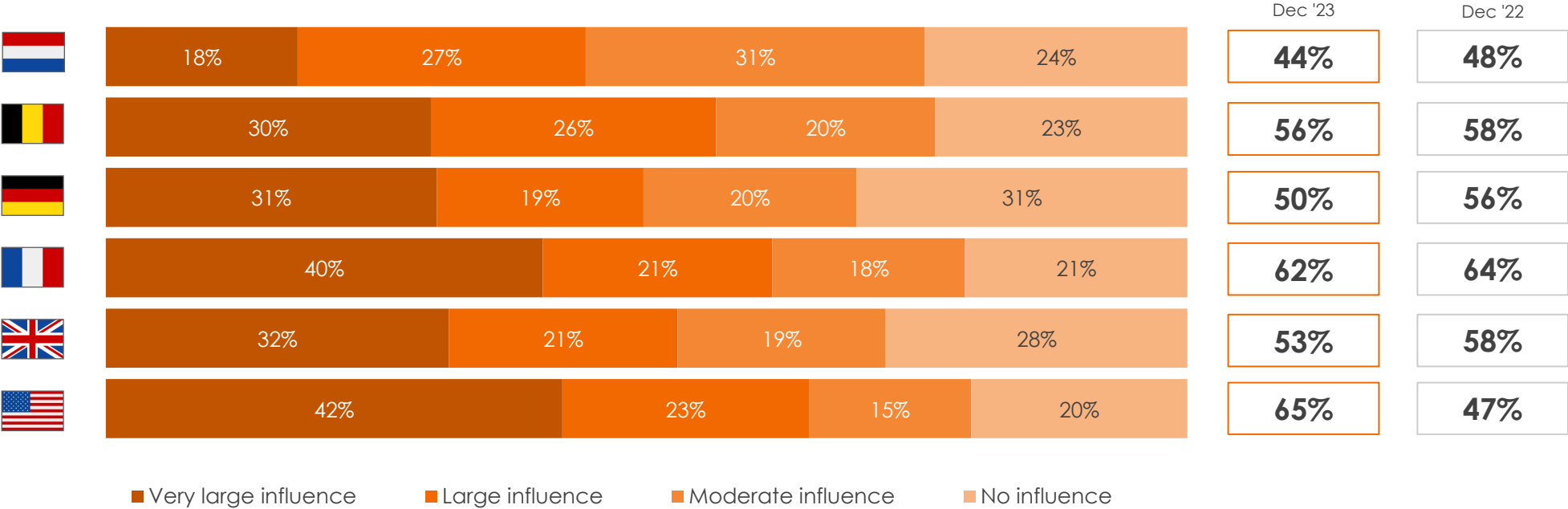■ Very large influence ■ Large influence ■ Moderate influence ■ No influence

Base: People who have not yet booked but have a holiday intention for 2024.
Rounding differences may occur at the top 2%.

Q: To what extent do rising prices (fuel, gas/energy, groceries, etc.) have to do with the fact that you have not yet booked a holiday for 2024?

Influence of prices if not yet booked

On average, 55% of people without holiday plans say that rising prices play a (very) big role in this. This is the same average as a year ago. Among European countries, the top2 score has fallen compared to a year ago, but among Americans it has risen considerably.

To what extent are rising prices (fuel, gas/energy, groceries, etc.) related to the fact that you have no holiday plans at all for 2024?

Top 2

	Very large influence	Large influence	Moderate influence	No influence	Dec '23	Dec '22
🇳🇱	18%	27%	31%	24%	**44%**	**48%**
🇧🇪	30%	26%	20%	23%	**56%**	**58%**
🇩🇪	31%	19%	20%	31%	**50%**	**56%**
🇫🇷	40%	21%	18%	21%	**62%**	**64%**
🇬🇧	32%	21%	19%	28%	**53%**	**58%**
🇺🇸	42%	23%	15%	20%	**65%**	**47%**

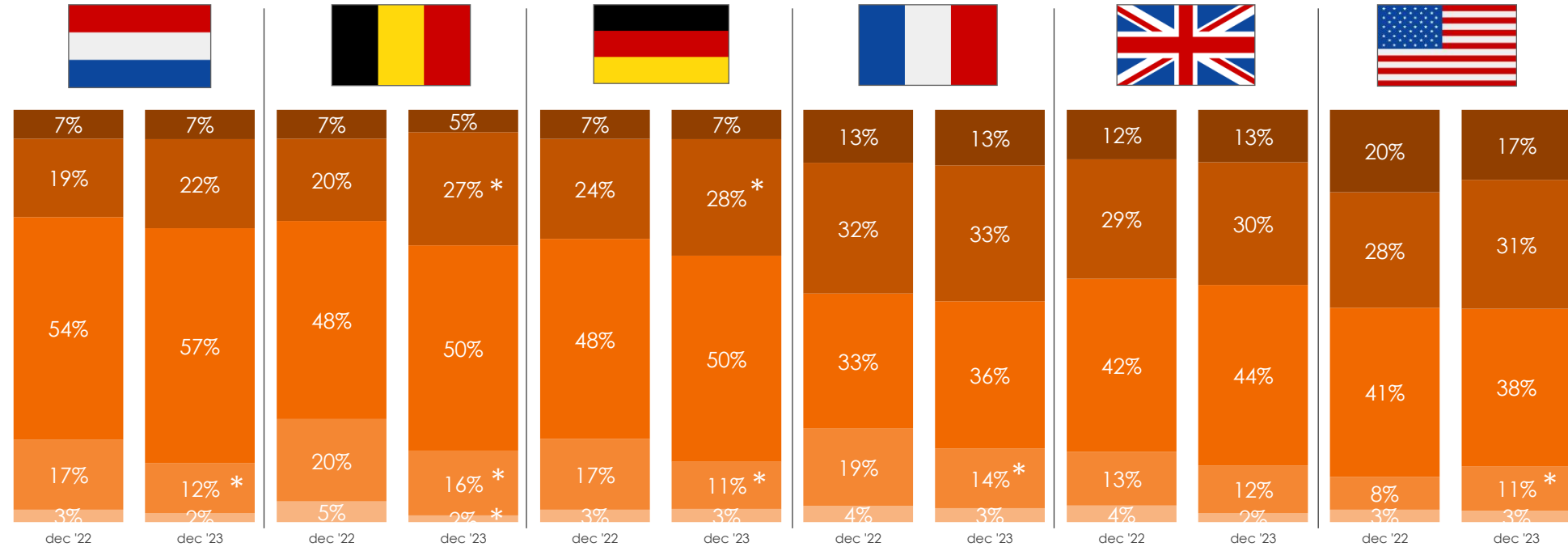■ Very large influence ■ Large influence ■ Moderate influence ■ No influence

Base: People who currently have no holiday intention for 2024
Rounding differences may occur at the top 2%.

Q: To what extent are rising prices (fuel, gas/energy, groceries, etc.) related to the fact that you have no holiday plans at all for 2024?

Influence of prices if no holiday plans

Of those with a holiday intention for 2024, an average of 46% say they have a similar holiday budget for their next holiday as in previous years. A year ago, this was 44% on average. Furthermore, an average of 29% say they will have a slightly higher budget (a year ago this was 25%).

The holiday budget for my next holiday in 2024 is....

	dec '22	dec '23
Netherlands	7% / 19% / 54% / 17% / 3%	7% / 22% / 57% / 12% * / 2%
Belgium	7% / 20% / 48% / 20% / 5%	5% / 27% * / 50% / 16% * / 2% *
Germany	7% / 24% / 48% / 17% / 3%	7% / 28% * / 50% / 11% * / 3%
France	13% / 32% / 33% / 19% / 4%	13% / 33% / 36% / 14% * / 3%
UK	12% / 29% / 42% / 13% / 4%	13% / 30% / 44% / 12% / 2%
USA	20% / 28% / 41% / 8% / 3%	17% / 31% / 38% / 11% * / 3%

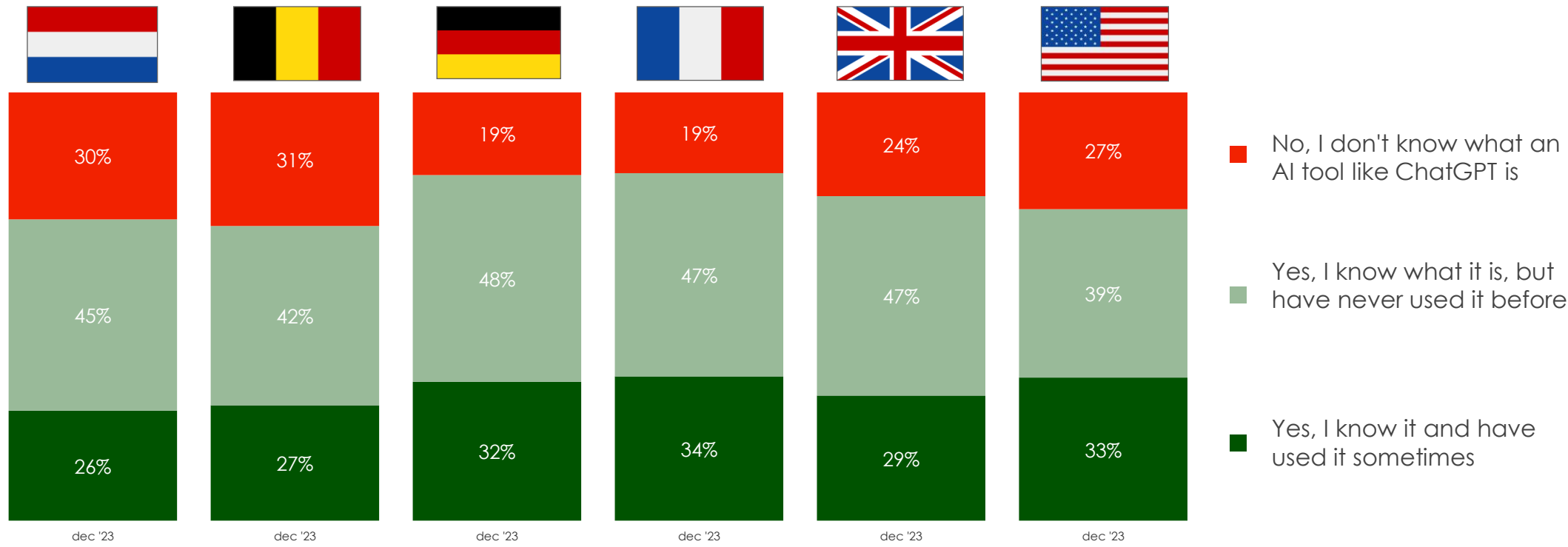Legend: ■ Much lower   ■ Lower   ■ Similar   ■ Slightly higher   ■ Much higher

Base: People with holiday plans for 2024 (booked or yet to book)
(A year ago, people were asked about 2023)
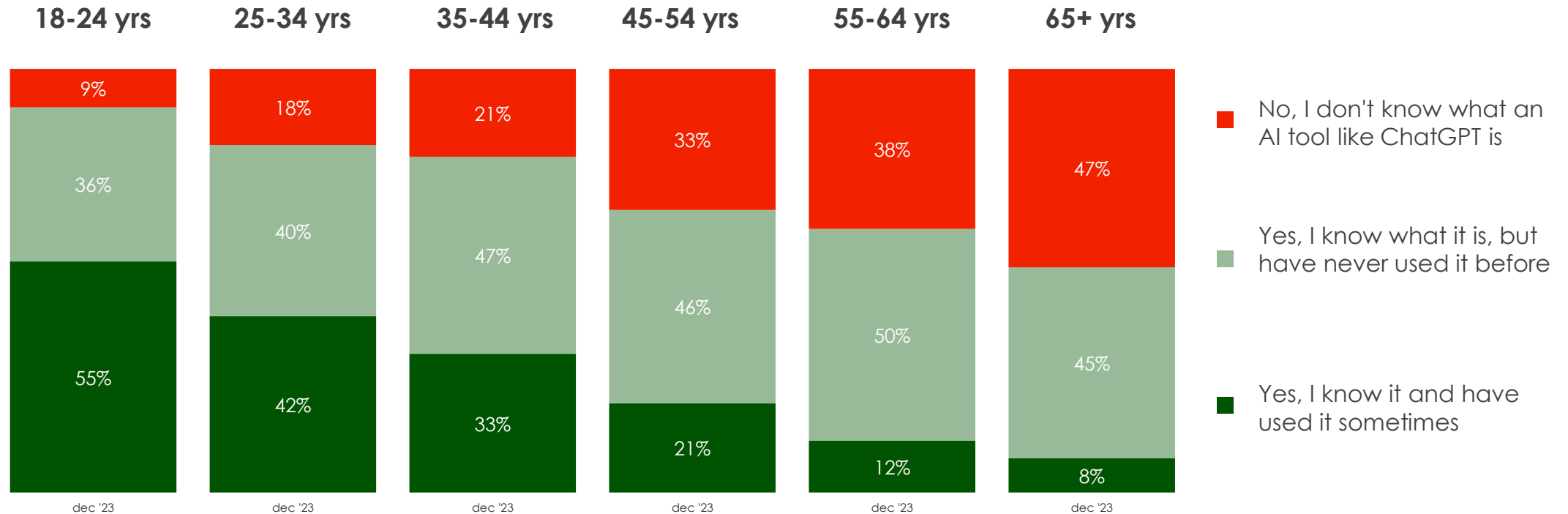
Q: Which situation is most applicable to you?

Holiday budget

3. Holiday inspiration through digital tools

On average, 30% of those surveyed are familiar with AI tools like ChatGPT and have used it. On average 45% know what it is but have never used it. On average 25% do not know what an AI tool like ChatGPT is.

	Netherlands	Belgium	Germany	France	UK	USA
No, I don't know what an AI tool like ChatGPT is	30%	31%	19%	19%	24%	27%
Yes, I know what it is, but have never used it before	45%	42%	48%	47%	47%	39%
Yes, I know it and have used it sometimes	26%	27%	32%	34%	29%	33%
	dec '23	dec '23	dec '23	dec '23	dec '23	dec '23

Base: everyone (entire sample)

Q: Are you familiar with AI tools like ChatGPT?

Familiarity with AI tools

55% of Dutch people aged 18-24 sometimes use an AI tool such as ChatGPT. Only 9% of this group do not know what such a tool is. The more the age increases, the less familiar people are with AI tools such as ChatGPT. Among those over 55, only 10% have ever used such a tool.

| 18-24 yrs | 25-34 yrs | 35-44 yrs | 45-54 yrs | 55-64 yrs | 65+ yrs |

- **No, I don't know what an AI tool like ChatGPT is** (red)
- **Yes, I know what it is, but have never used it before** (light green)
- **Yes, I know it and have used it sometimes** (dark green)

Age	No, don't know	Know but never used	Know and used sometimes
18-24 yrs	9%	36%	55%
25-34 yrs	18%	40%	42%
35-44 yrs	21%	47%	33%
45-54 yrs	33%	46%	21%
55-64 yrs	38%	50%	12%
65+ yrs	47%	45%	8%

Base: Dutch

Q: Are you familiar with AI tools like ChatGPT?

Familiarity with AI tools vs age (NL)

Of those who do use an AI tool such as ChatGPT, an average of 32% use such a tool for holiday inspiration. This percentage is highest among Americans and French (42% and 41% respectively) and lowest among Germans (24%).
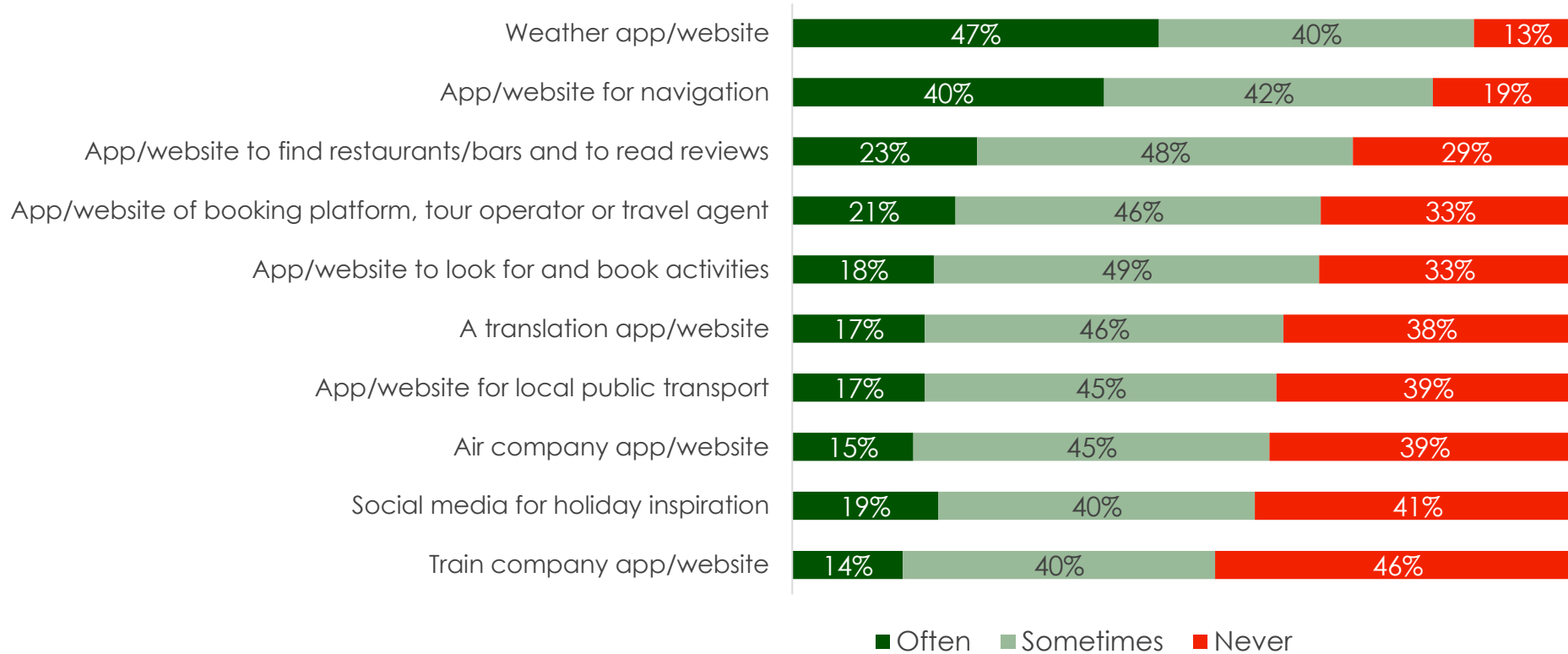

■ % yes
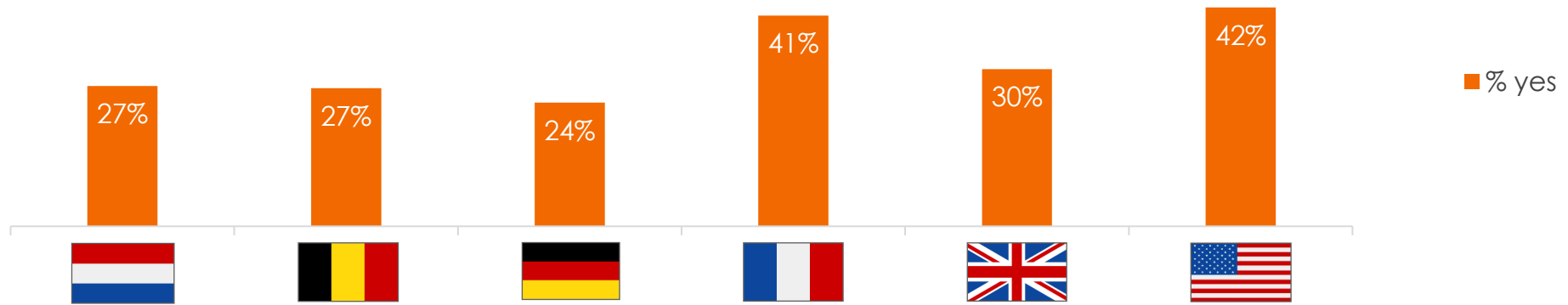
Base: People who have ever used an AI tool such as ChatGPT

Q: Have you ever used an AI tool like ChatGPT to get holiday inspiration (yes/no)?

AI tool usage for holiday inspiration

During a holiday, apps/websites for weather forecasts and for navigation are used the most. This is followed by apps/websites to find a restaurant or bar (and read reviews).

These are the results of all respondents in this survey (6 countries).

	Often	Sometimes	Never
Weather app/website	47%	40%	13%
App/website for navigation	40%	42%	19%
App/website to find restaurants/bars and to read reviews	23%	48%	29%
App/website of booking platform, tour operator or travel agent	21%	46%	33%
App/website to look for and book activities	18%	49%	33%
A translation app/website	17%	46%	38%
App/website for local public transport	17%	45%	39%
Air company app/website	15%	45%	39%
Social media for holiday inspiration	19%	40%	41%
Train company app/website	14%	40%	46%

■ Often ■ Sometimes ■ Never

Base: Everyone (6 countries)

Q: Do you ever use the following (mobile) apps or websites while on holiday? (often/sometimes/never)

Use of apps/websites during holidays

Among the Dutch, Instagram is the social media platform most often used for holiday inspiration (31%), followed by Facebook (30%). Among Belgians, French and Americans, Facebook is most often used for this purpose, and among Germans and British it is YouTube.

% I often use	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Instagram	**31%**	27%	30%	33%	32%	38%
TikTok	17%	17%	20%	25%	26%	29%
Pinterest	11%	11%	14%	16%	15%	22%
YouTube	23%	27%	**34%**	31%	**37%**	40%
Facebook	30%	**40%**	29%	**37%**	34%	**42%**
Snapchat	9%	12%	13%	22%	18%	22%

Base: People who sometimes/frequently use social media for holiday inspiration
Highlight: highest percentage by country

Q: Which social media app(s) do you use for holiday inspiration?
(By social media app: never/sometimes/often).

The use of social media apps for holiday inspiration varies greatly between different age groups. About half of Dutch people aged between 18 and 34 use Instagram for this purpose. Among over-55s, it is only about 10%. From 35 years and older, Facebook is the most frequently used social media platform for holiday inspiration.

% I often use	18-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55-64 yrs	65+ yrs
Instagram	**51%**	**45%**	33%	22%	11%	7%
TikTok	36%	25%	13%	14%	6%	4%
Pinterest	14%	17%	12%	8%	8%	2%
YouTube	29%	36%	22%	16%	16%	15%
Facebook	20%	40%	**34%**	**26%**	**27%**	**27%**
Snapchat	27%	12%	5%	5%	3%	0%

Base: People who sometimes/frequently use social media for holiday inspiration
Highlight: highest percentage by country

Q: Which social media app(s) do you use for holiday inspiration?
(By social media app: never/sometimes/often).

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Element	Description
Method:	Online
Target audience:	0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA 2-measurement: NL/BE/DE/UK 3-measurement: NL/BE/DE/FR/UK/USA/CHINA 4-measurement: NL/BE/DE/UK 5-measurement NL/BE/DE/FR/UK/USA/CHINA 6-measurement: NL/BE/DE/FR/UK/USA/CHINA 7-measurement: NL/BE/DE/FR/UK/USA/CHINA 8-measurement: NL/BE/DE/FR/UK/USA/CHINA 9-measurement: NL/BE/DE/FR/UK/USA/CHINA 10-measurement: NL/BE/DE/FR/UK/USA/CHINA 11-measurement: NL/BE/DE/FR/UK/USA 12-measurement: NL/BE/DE/FR/UK/USA 13-measurement: NL/BE/DE/FR/UK/USA 14-measurement: NL/BE/DE/FR/UK/USA 15-measurement: NL/BE/DE/FR/UK/USA 16-measurement: NL/BE/DE/FR/UK/USA (+CHINA APART) 17-measurement: NL/BE/DE/FR/UK/USA 18-measurement: NL/BE/DE/FR/UK/USA
Sample source:	Consumer panel of Dynata (except the 16-measurement in China, which was via WeChat)
Sample size:	Net n=1,000 by country, 18+ nationally representative by age, gender and region.
Fieldwork period:	0 measurement: 21 May to 1 Jun 2020 1 measurement: 17 Jun to 26 Jun 2020 2-measurement: 24 Jul / 28 Jul 2020 3 measurement: 7 Sep to 18 Sep 2020 4-measurement: 27 Oct to 1 Nov 2020 5-measurement: 7 Jan to 13 Jan 2021 6-measurement: 18 Mar to 23 Mar 2021 7-measurement: 19 May to 25 May 2021 8-measurement: 1 Jul to 6 Jul 2021 9-measurement: 1 Sep to 7 Sep 2021 10-measurement: 15 Nov to 21 Nov 2021 11-measurement: 31 Mar to 6 Apr 2022 12-measurement: 13 Jun to 21 Jun 2022 13-measurement: 2 Sep to 8 Sep 2022 14-measurement: 5 Dec to 9 Dec 2022 15-measurement: 9 Mar to 14 Mar 2023 16-measurement: 1 Jun to 7 Jun 2023 17-measurement: 25 Aug to 31 Aug 2023 18-measurement: 1 Dec to 8 Dec 2023

Research justification

NBTC

Nederlands Bureau
voor Toerisme &
Congressen