

Holiday Sentiment Monitor

Results 22-measurement

January 2025



1. Holiday planning results	5
2. Impact of rising prices on holiday plans	43
3. Annex	49



Take outs

- 1. Holiday intention for the new year higher than a year ago.**

On average, 89% of those surveyed intend to go on holiday in 2025. A year ago, an average of 86% had a holiday intention for 2024. Holiday intention is currently highest among the Brits (93%) and the Spanish (92%) and lowest among Belgians and French (both 87%). Among Dutch people, it is 88%.
- 2. Dutch people with holiday intentions expect to take two to three holidays in 2025.**

Those surveyed from seven countries, who have a holiday intention for 2025, say they plan to take an average of 2.6 holidays this year. A year ago, this average was the same. The average for 2025 is highest among Americans (3.0) and lowest among the Dutch and Belgians (2.4). People with holiday intentions in 2025 expect to spend their longest holidays of the year mostly in July and August (both averaging 18%). This is similar to the measurement a year ago.
- 3. 33% have already booked holidays, with many of them leaving in the first few months of 2025.**

The share that has already booked a holiday is similar to a year ago (then averaging 32%). In the UK, the share that has already booked is the highest (44%) and in France the lowest (28%). Among Britons and Americans, the proportion 'already booked' is significantly higher than a year ago. Three quarters of those who have already booked say their next holiday will be in the first half of 2025. Of those 75%, 40% will leave in the first quarter and 35% in the second quarter.
- 4. Market potential: 56% of respondents have holiday intentions but have yet to book. And of these, more than half are already planning.**

56% of those surveyed say they have yet to book, but have a holiday intention for 2025. Of that group, 56% are already planning. They mostly focus on the months April and May (both averaging 15%), followed by June and July (both averaging 14%). Of this group that is already planning a holiday, the largest group plans to book within 1 to 3 months (average 43%). If they do have a holiday intention but are not yet planning, it is mainly because they have not yet had time to do so (average 30%).
- 5. More holiday plans outside Europe.**

The Dutch are more likely to spend their next holidays outside Europe in 2025 than a year ago. This is also true for the French and British. Among the Dutch, it is mainly couples ('holidays with partner') that trigger the increase outside Europe. Nevertheless, most Dutch people plan to spend their next holiday (elsewhere) in Europe (58%). In addition, 21% of Dutch people will stay in their own country; this is a similar proportion to a year ago. The French, Spanish and Americans are the ones opting for a holiday in their own country to the highest extent.





Take outs

- 6. Gelderland and Limburg most considered for holidays at home. More Dutch opt for bungalow (park).**

Dutch people who want to spend their next holiday in the Netherlands in 2025 say they want to do this most in Gelderland and Limburg (16% and 14% respectively). A year ago, these provinces also made the top 2. They are followed by North Holland (12%) and Drenthe (11%). Compared to a year ago, plans for a holiday/weekend break in North Holland have increased. Moreover, this year, Dutch people are opting for a bungalow (park) more often than a year ago, both at home and elsewhere in Europe.
- 7. Aeroplane again most chosen for European holiday.**

Air travel is the most frequently chosen means of transport for the next holiday in Europe (average 60%). Among the British and the Spanish, this share is highest (84% and 82% respectively). Overall, the choice of transport is similar to a year ago. Among the Dutch, Belgians and Germans, the car also scores relatively high. On average, 5% of holidaymakers from six countries are considering the train for their next holiday in Europe.
- 8. Crowds, prices and chance of extreme weather play most important role in choice of holiday destination.**

Half of those surveyed (48%) avoid certain holiday destinations because of (negative reports) about over-tourism. Thus, some of the Dutch find destinations such as Spain, Turkey, Italy, Greece and Egypt, but also Venice, Barcelona and Bali too crowded. In addition, 48% also indicate that they have to make other choices because of rising prices. This happens mainly by going on holiday less often and/or opting for cheaper accommodation. Finally, increasing extreme weather conditions influence holiday choices for 40% of those surveyed. As a result, the Dutch and Germans mainly adjust the destination, while the other countries mainly adjust the holiday month.
- 9. Spain remains favourite holiday country.**

Despite crowds and over-tourism in certain parts of Spain, it remains the most chosen holiday country among those surveyed. Among the Dutch, Germans and British, Spain tops the top five European holiday destinations with a wide score. For Belgians, France is their favourite holiday destination, followed by Spain, with the Netherlands in fifth place. Among the Germans, the Netherlands ranks sixth. Besides Spain, other holiday destinations such as Italy, France and Greece are also frequently chosen.



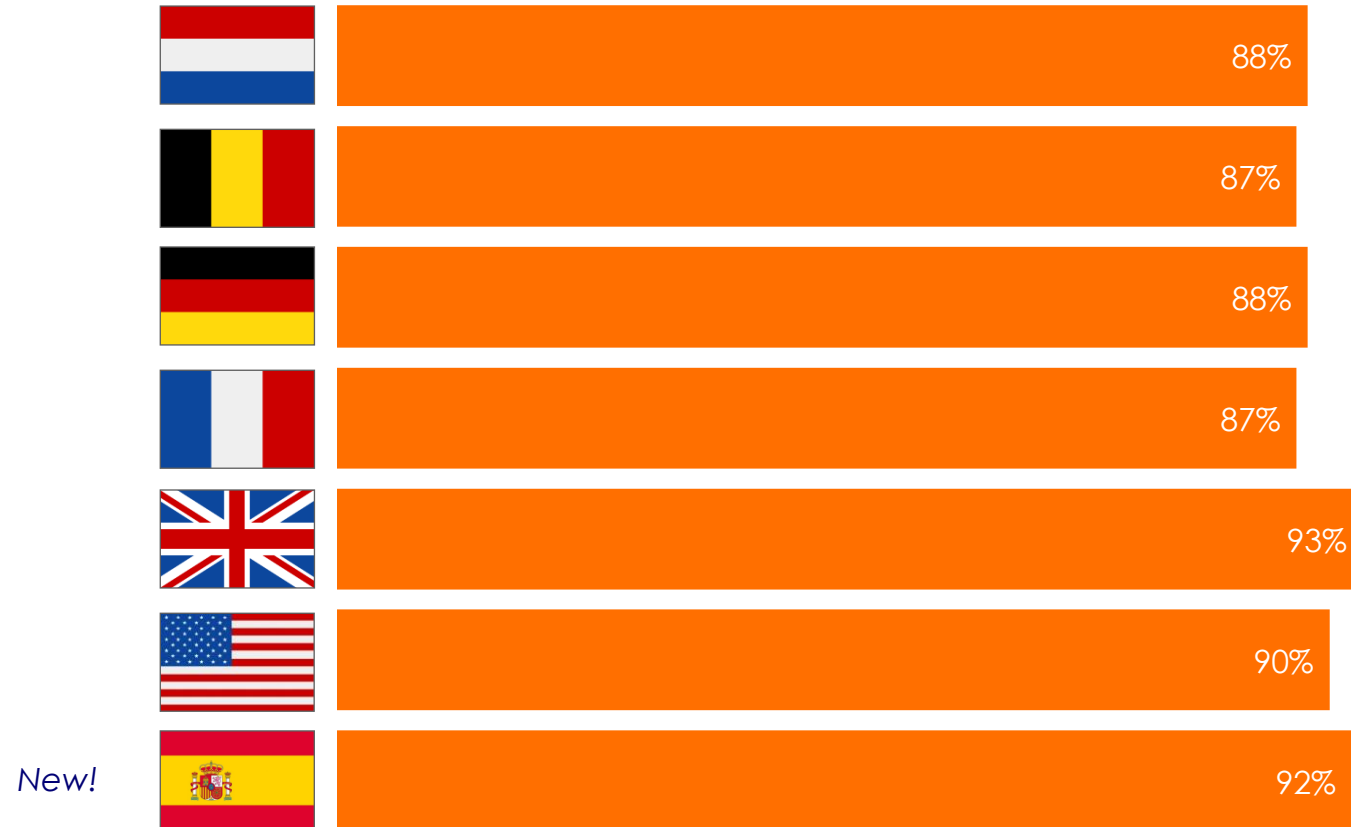


1. Holiday planning results





Holiday intention for 2025 is highest among the British (93%) and Spanish (92%). On average, 89% of respondents from these seven countries have an intention to go on holiday in the year 2025, 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 86% had a holiday intention for 2024 (in six countries excluding Spain). So there is now an increase from 86% to 89%.



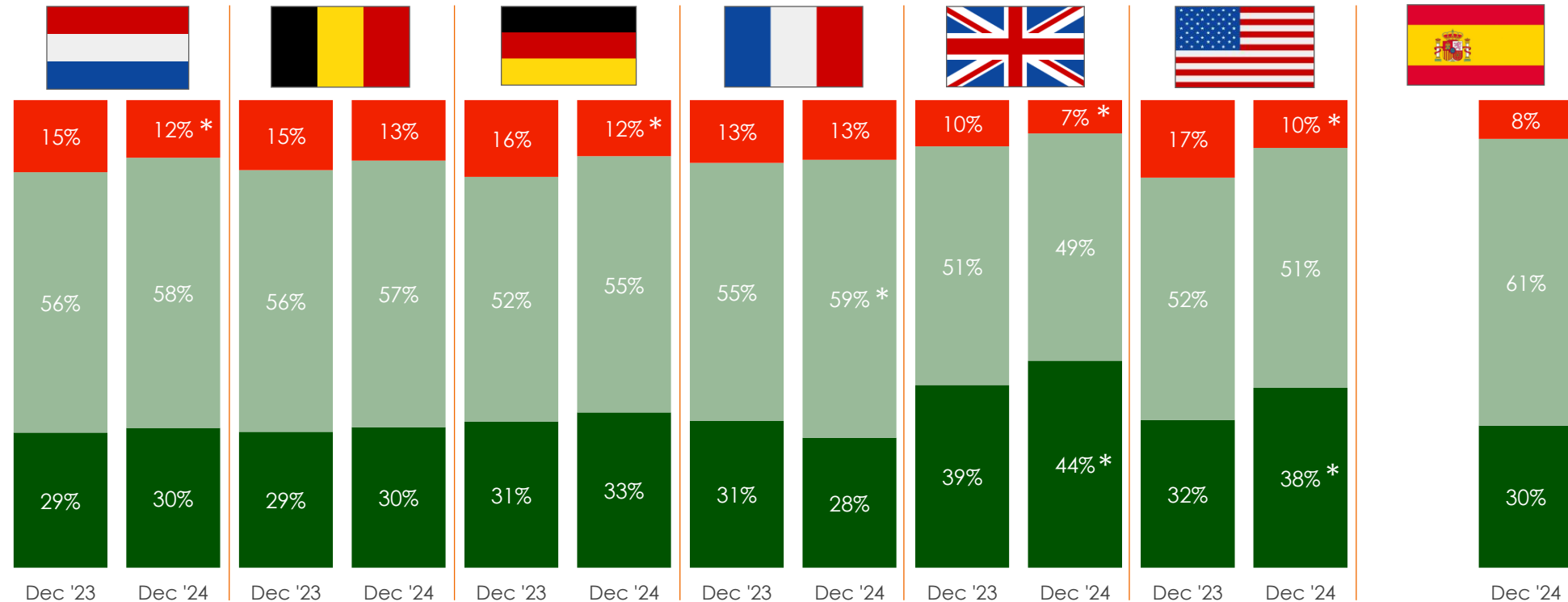
Holiday intention for 2025 (% top 2):

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





On average, 33% have already booked a holiday for 2025. A year ago, this was (in six countries, excluding Spain) 32%. The British currently have the highest proportion 'already booked' (44%). Among the French, this share is the lowest (28%). Overall, the share that has a holiday intention for the next 12 months is higher than a year ago (it is the share 'booked' + 'have yet to book').



■ Yes, already booked

■ Yes, have yet to book

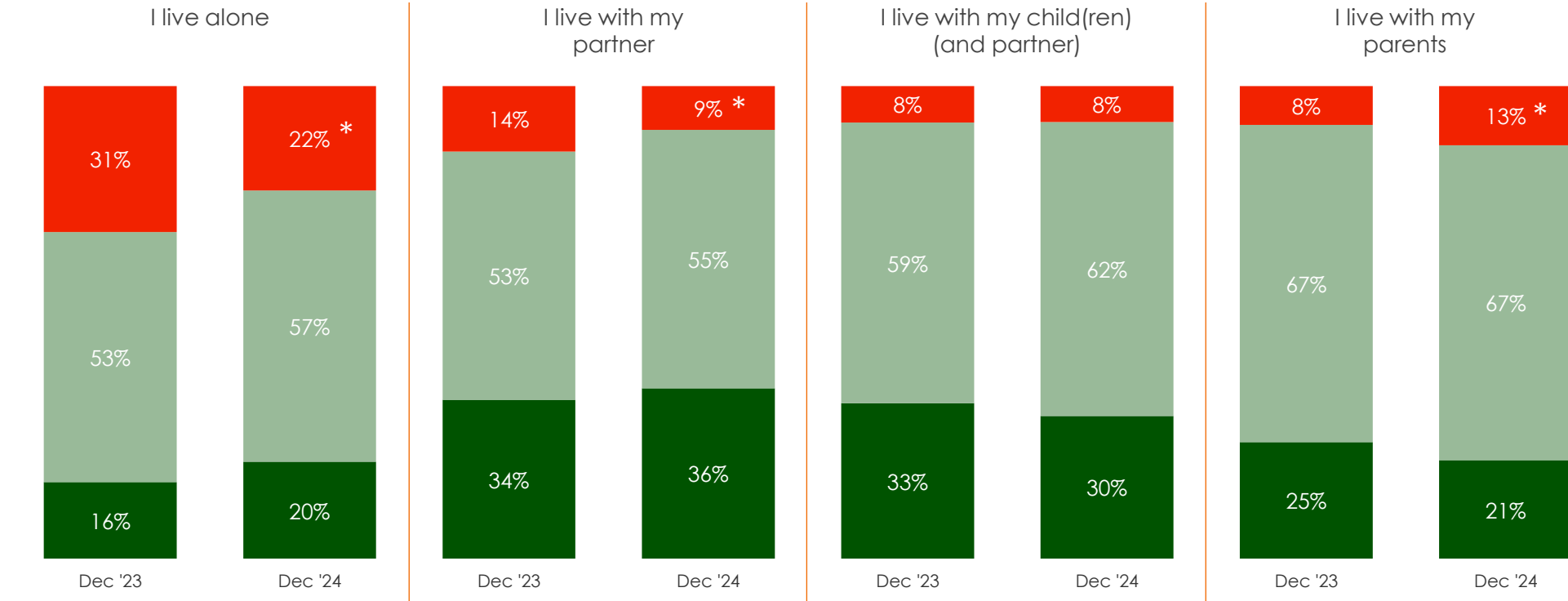
■ No, no intention

Base: everyone (entire sample)

*: significant difference compared to the measurement 1 year ago

Q: Do you currently intend to go on holiday sometime in 2025?
(in the Dec '23 measurement, it was about a holiday in 2024)

Dutch people living with their partner have already booked holidays for 2025 to the highest extent (36%). The group living with child(ren) (and partner) follows next (30%). Among Dutch people living alone, holiday intention has increased the most compared to a year ago.



■ Yes, already booked

■ Yes, have yet to book

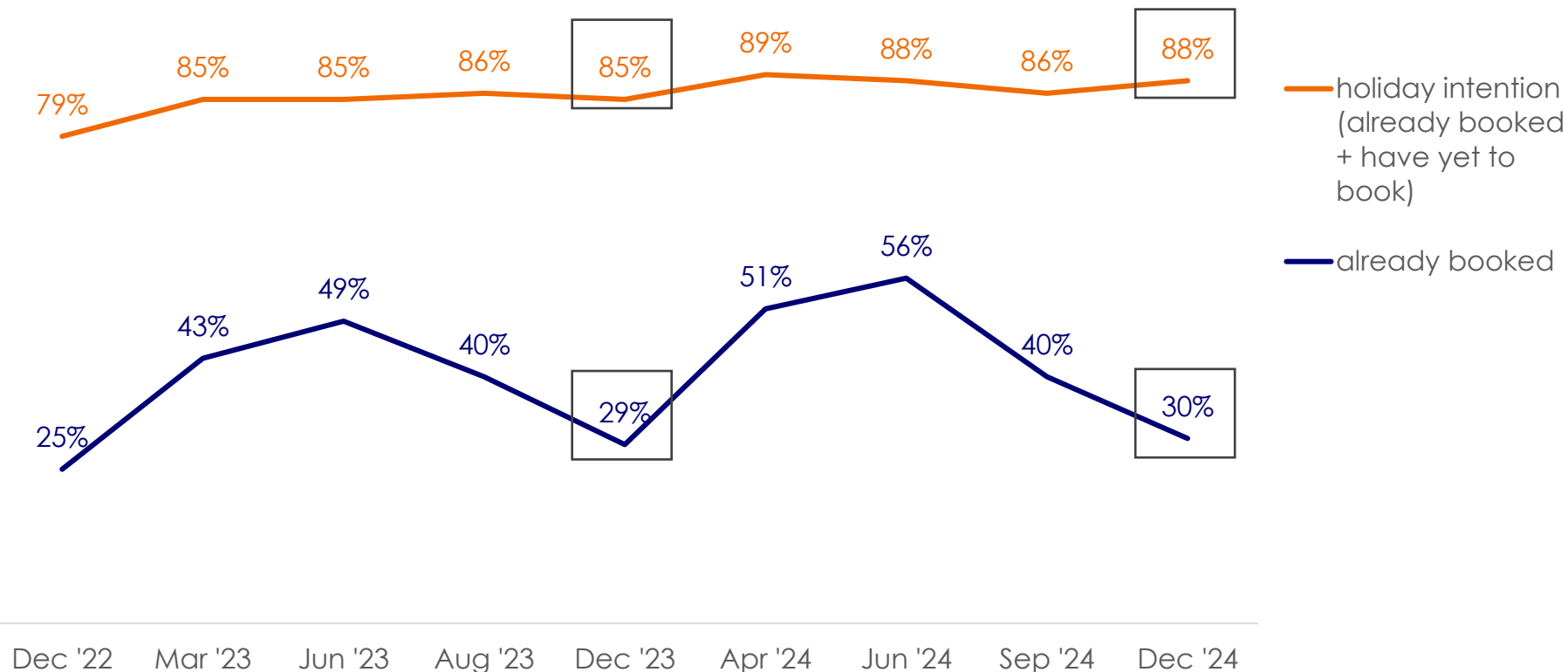
■ No, no intention

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

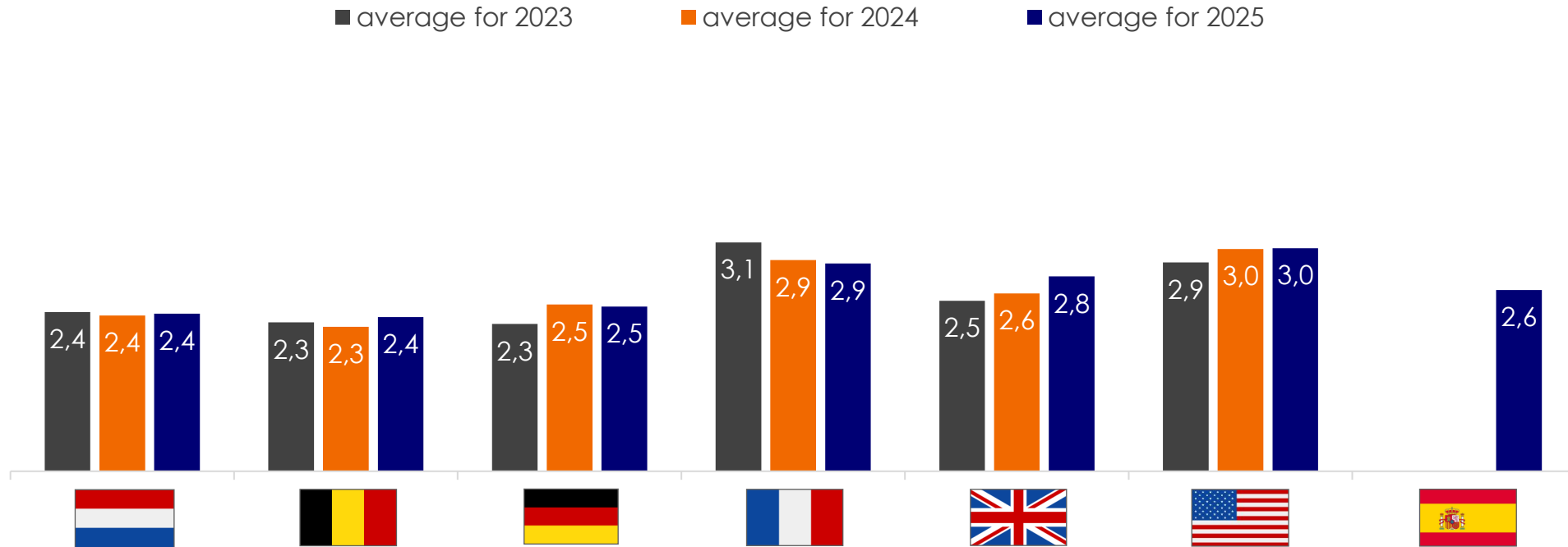
Q: Do you currently intend to go on holiday sometime in 2025?
 (in the Dec '23 measurement, it was about a holiday in 2024)



Holiday intention (already booked + have yet to book) among Dutch people in the first week of December (2024) is 88%. This is higher than a year ago, when it was 85%. The share of Dutch people who have already booked is now 30%. A year ago, this was similar at 29%. The annual pattern is that the share of 'already booked' is lower in the winter months and rises in spring / towards summer. In each case, this concerns a holiday intention in the next 12 months.



Those surveyed from the seven countries below, who have a holiday intention for 2025, say they intend to take an average of 2.6 holidays. A year ago, this average was the same (among six countries, excluding Spain). The average for 2025 is highest among Americans (3.0) and lowest among the Dutch and Belgians (both 2.4).

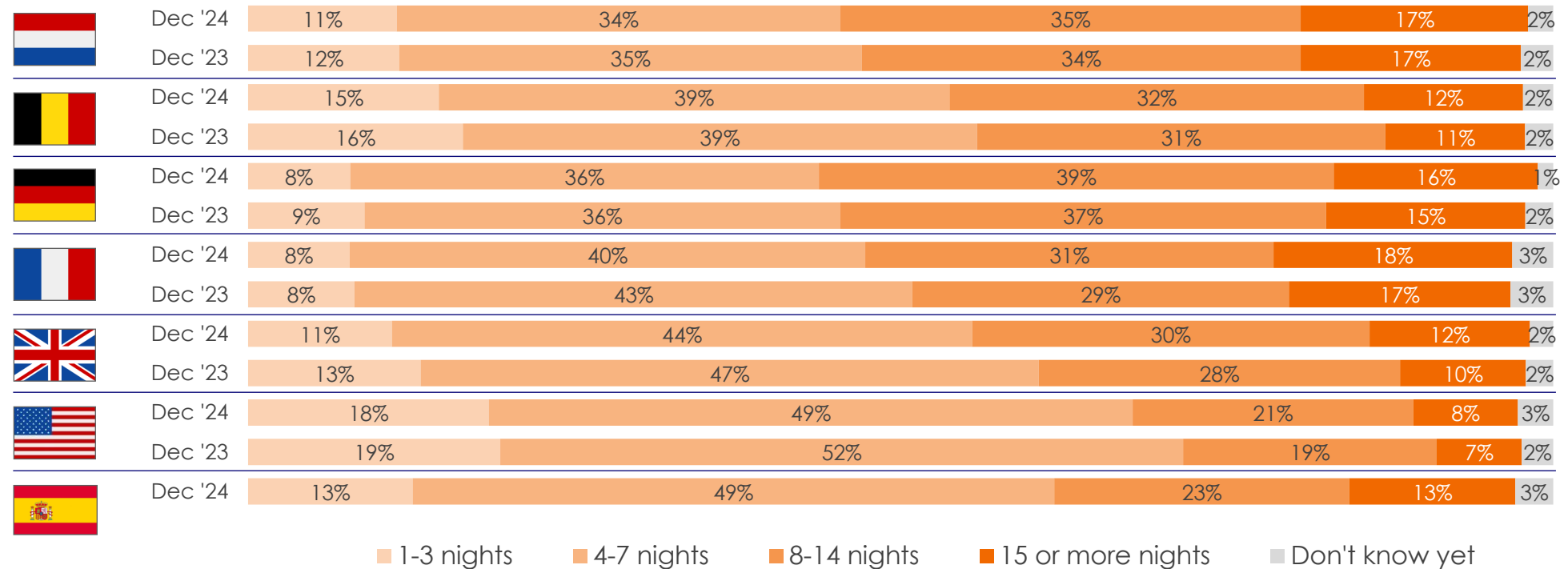


Base: People with holiday plans for 2025 (booked or yet to book)
 Last years, they were asked about the number of holidays for 2023 and 2024.

Question: how many holidays do you plan to take in 2025?
 This could be either short or long holidays at home and abroad.



On average, the majority of respondents with a holiday intention are going 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; 18% go away for 1-3 nights.

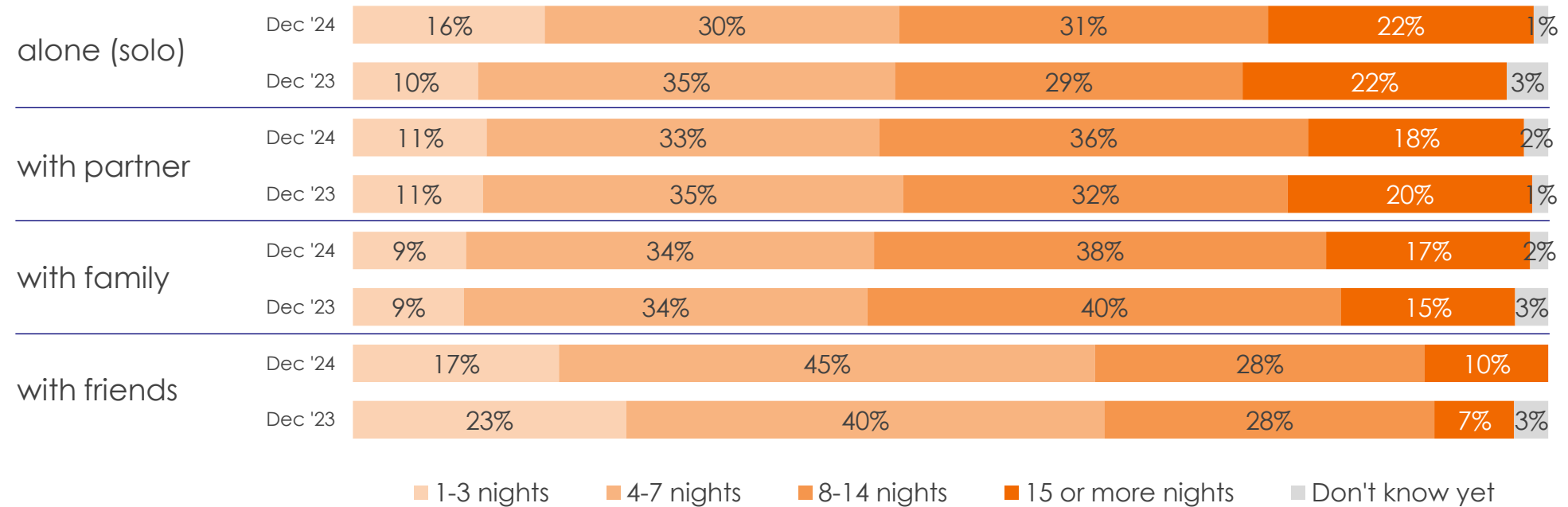


Base: People with holiday plans for 2025 (booked or yet to book)
(The measurement a year ago asked about 2024)

Q: How long do you plan to be away on your next holiday (in 2025)?



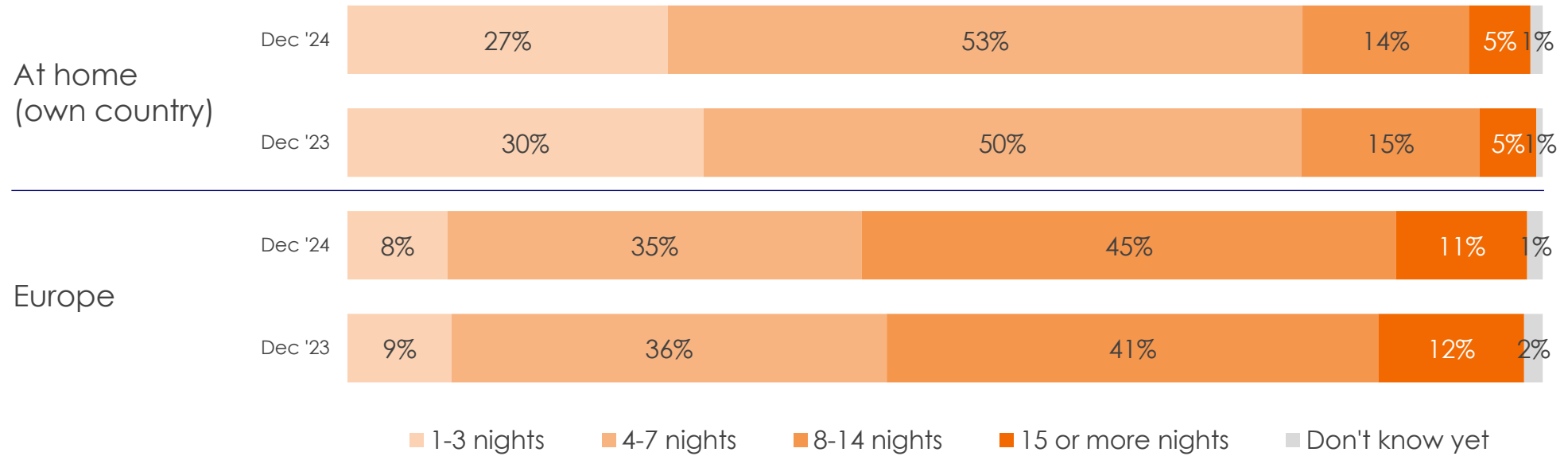
Among solo travellers, an increase in terms of short holidays of 1-3 nights is visible compared to a year ago. Among holidays with friends, the proportion of short holidays has actually decreased and the length of stay of 4-7 nights has increased.



Base: People with holiday plans for 2025 (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 2025)?

Of the Dutch who spend their next the holiday in their own country, over a quarter go for a short holiday (1 -3 nights). About half opt for 4-7 nights. When it comes to a holiday destination (elsewhere) in Europe, 8-14 nights is the most frequently chosen length of stay by Dutch people (45%), followed by 4-7 nights (35%).










Base: People with holiday plans for 2025 (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 2025)?



Overall, the most frequent booking for 2025 was made directly with the provider (49% on average). A year ago, this was 47% on average. Americans who have already booked a holiday say they did so at the highest rate directly with the provider (64%). The Spanish most often booked through a travel organisation or booking website (43%). Among Germans, these two ways are equally common (both 41%).

							
Directly with the provider (e.g. directly with the hotel/ accommodation/ transport company)	50% (51%)	46% (40%)	41% (43%)	51% (45%)	46% (48%)	64% (55%)	38%
Through a travel agent/ tour operator booking website	37% (33%)	39% (45%)	41% (39%)	34% (39%)	35% (39%)	18% (22%)	43%
A combination of the above two options	11% (10%)	11% (10%)	14% (15%)	11% (12%)	17% (10%)	14% (17%)	18%
Other, namely	3% (5%)	3% (4%)	2% (3%)	3% (2%)	1% (2%)	2% (4%)	2%
Don't know	0% (2%)	1% (2%)	1% (1%)	1% (2%)	0% (0%)	1% (1%)	0%








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

Base: People who have already booked a holiday for 2025.
 Tag: the highest percentage by country.
 In brackets the score of the measurement one year ago.

Q: How is your next holiday (in 2025) booked?



Among those who have already booked a holiday, the next holiday is mostly in January (average 15%) and February (average 13%). Among Dutch people, May is in second position with 15%. Among Belgians, July is currently the most booked month, among Germans it is May and among Brits it is April.


							
January	16% (14%)	14% (15%)	11% (12%)	16% (12%)	13% (13%)	23% (21%)	14%
February	11% (14%)	12% (10%)	9% (13%)	13% (14%)	14% (11%)	18% (16%)	14%
March	11% (13%)	9% (10%)	11% (7%)	8% (12%)	14% (15%)	14% (13%)	11%
April	8% (13%)	14% (13%)	11% (14%)	9% (11%)	17% (12%)	12% (13%)	12%
May	15% (12%)	10% (12%)	16% (15%)	15% (10%)	13% (12%)	6% (12%)	10%
June	12% (9%)	12% (12%)	14% (14%)	12% (10%)	11% (12%)	9% (7%)	9%
July	13% (13%)	15% (15%)	14% (9%)	14% (17%)	6% (10%)	5% (6%)	13%
August	8% (6%)	7% (7%)	7% (9%)	7% (8%)	6% (9%)	5% (6%)	9%
September	2% (3%)	3% (2%)	6% (3%)	3% (3%)	4% (3%)	2% (3%)	3%
October	2% (1%)	2% (2%)	1% (1%)	1% (1%)	1% (2%)	1% (1%)	1%
November	1% (0%)	0% (0%)	0% (1%)	1% (0%)	0% (1%)	1% (1%)	1%
December	1% (1%)	1% (2%)	1% (1%)	1% (1%)	0% (1%)	3% (2%)	2%
Total	100%	100%	100%	100%	100%	100%	100%

Base: People who have already booked a holiday.
 Highlight: the highest percentage by country.
 In brackets, the scores from a year ago.

Q: In which month will you leave for your next holiday (in 2025)?
 (in the Dec '23 measurement, it was about a holiday in 2024)

Dutch people who have already booked a holiday with their partner tend to leave in January (20%), followed by June (17%). Among Dutch people going on holiday with their immediate family/other relatives, July is currently the most booked departure month (20%) and in second place is May (16%).



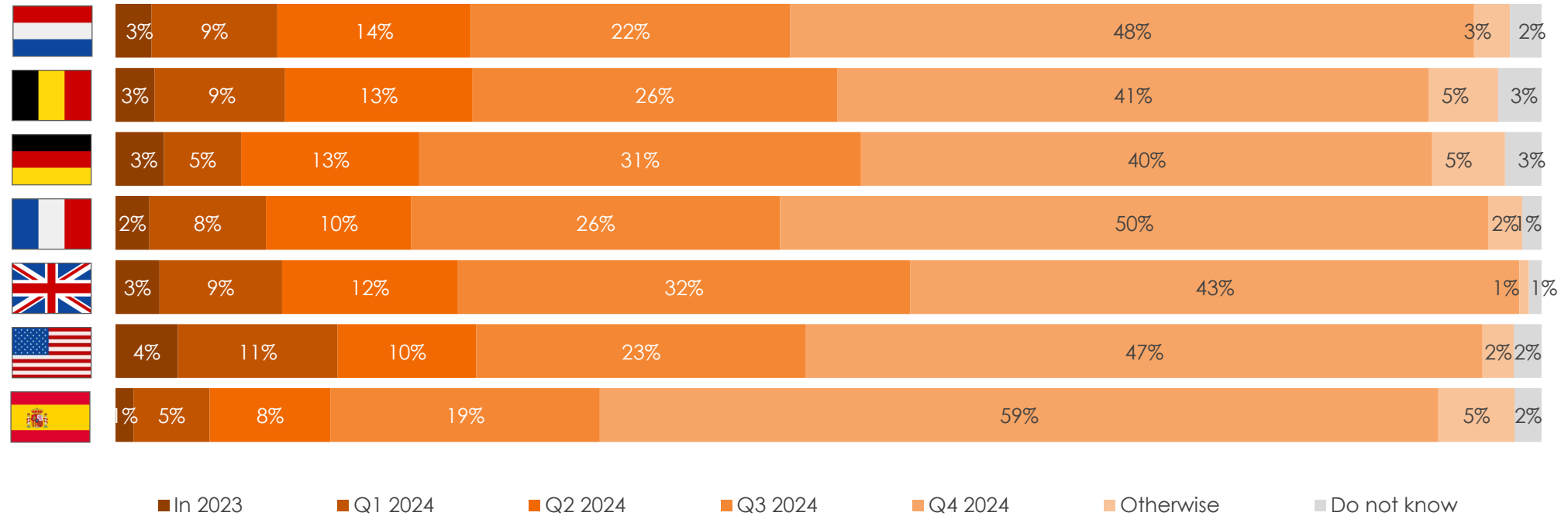
	With partner	With family
January	20%	8%
February	13%	12%
March	8%	15%
April	7%	11%
May	12%	16%
June	17%	9%
July	8%	20%
August	8%	9%
September	2%	0%
October	2%	1%
November	2%	0%
December	0%	0%
Total	100%	100%

Base: people who have already booked a holiday
 Highlight: the highest percentage by category
 Note: The most common travel company types are shown here

Q: In which month will you leave for your next holiday?



Of those who have already booked a holiday for 2025, the largest group did so in Oct/Nov/Dec i.e. Q4 2024 (average 47%). An average of 26% also booked in Q3 2024 (July/Aug/Sept). Among the Spanish, the relatively high proportion who booked in Q4 stands out (59%).



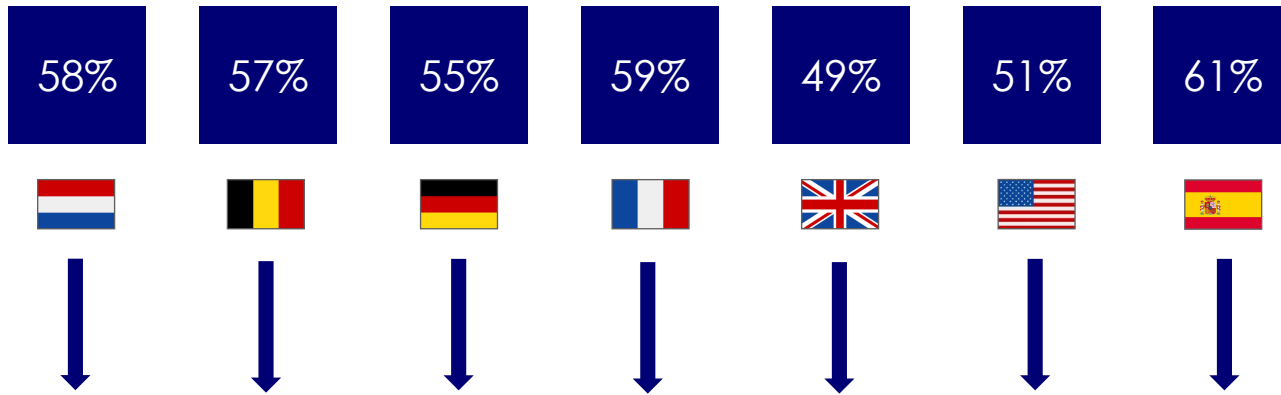
Base: People who have already booked a holiday for 2025

Q: When did you book your next holiday?

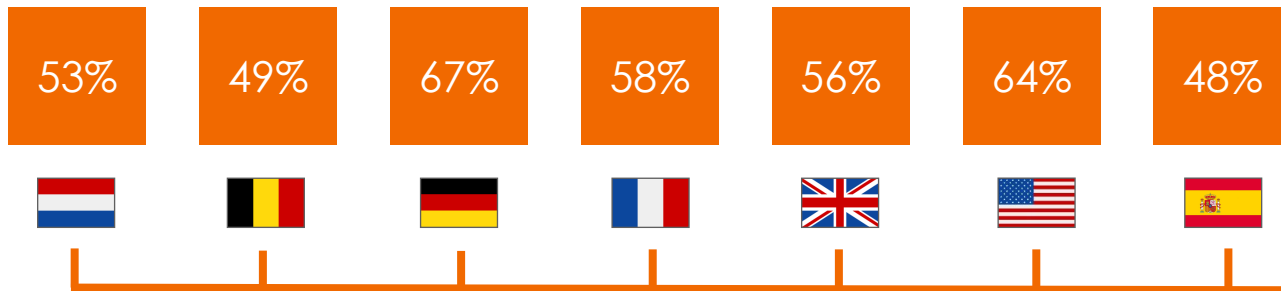
On average, 56% have a holiday intention for 2025 but have yet to book. Of this group that has yet to book, an average of 56% are planning a holiday. This currently includes the months of April and May (both averaging 15%), followed by June and July (both averaging 14%).



Holiday intention but have yet to book



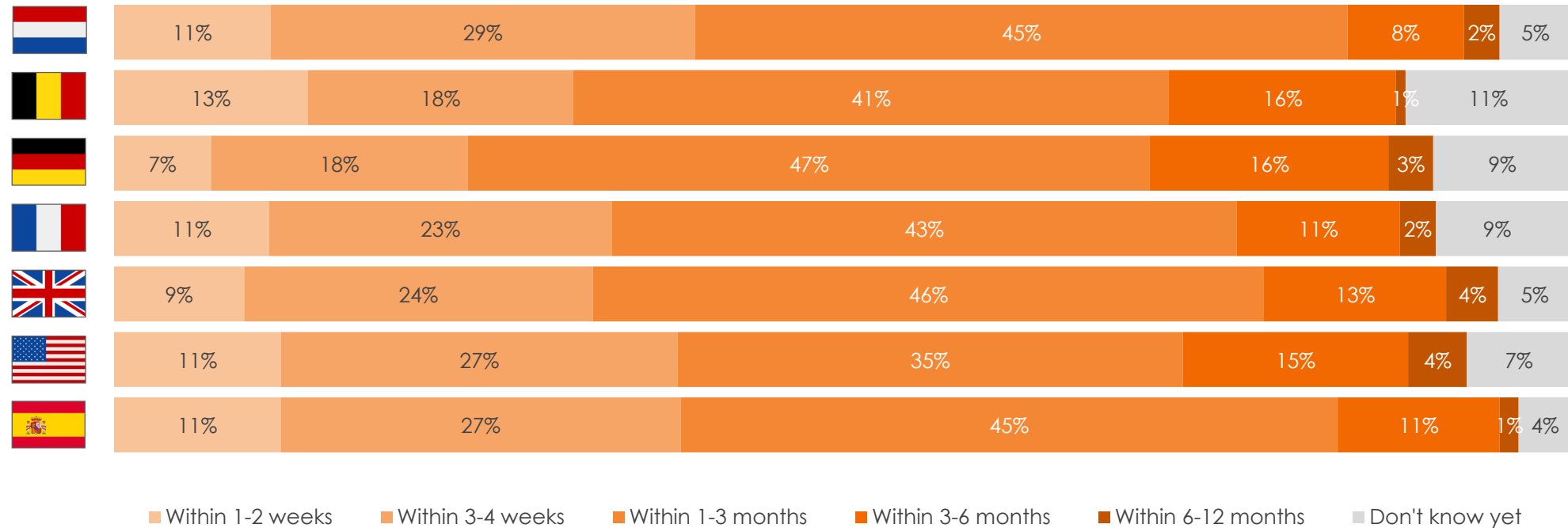
Planning a holiday



Month of departure:							
January	7%	4%	4%	6%	5%	8%	6%
February	7%	9%	7%	8%	6%	15%	7%
March	9%	6%	9%	7%	14%	14%	10%
April	13%	18%	12%	13%	20%	13%	16%
May	20%	15%	16%	14%	15%	13%	13%
June	12%	14%	18%	13%	10%	17%	12%
July	14%	20%	13%	17%	11%	9%	15%
August	10%	7%	12%	17%	8%	4%	14%
September	6%	4%	8%	4%	6%	2%	5%
October	1%	2%	2%	1%	2%	1%	1%
November	0%	1%	0%	0%	1%	1%	2%
December	3%	0%	1%	1%	1%	2%	0%
Number	N=326	N=308	N=391	N=366	N=280	N=349	N=306



Among those who are planning a holiday in 2025, the largest group plans to book it within 1 to 3 months (43% on average). In addition, an average of 24% say they plan to book within 3 to 4 weeks, 13% within 3 to 6 months and 10% within 1 to 2 weeks.










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?

On average, 56% of the people who have not yet booked, but do intend to go on holiday in 2025, are already planning an upcoming holiday. If people have a holiday intention but are not yet planning, it is mainly because they have not yet got around to it (average 30%) or their financial situation does not allow it (average 8%).



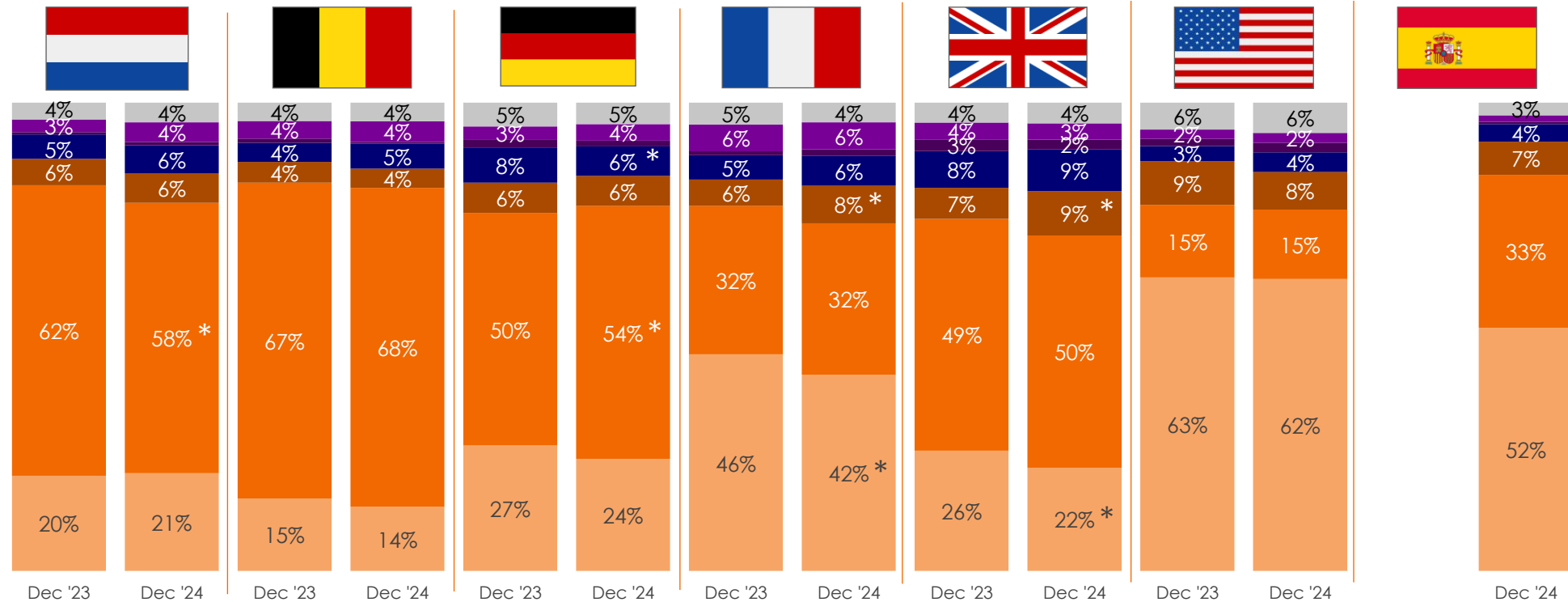
							
Yes (already planning)	53% (55%)	49% (51%)	67% (69%)	58% (60%)	56% (57%)	64% (64%)	48%
No, I haven't got around to planning yet	35% (33%)	37% (33%)	17% (17%)	26% (25%)	30% (29%)	22% (22%)	40%
No, my financial situation does not allow it (e.g. due to inflation and rising prices)	6% (8%)	7% (10%)	7% (8%)	10% (8%)	8% (8%)	11% (10%)	6%
No, because of uncertainties surrounding current wars	4% (3%)	5% (5%)	7% (5%)	5% (5%)	3% (4%)	1% (3%)	4%
No, for another reason	2% (2%)	1% (1%)	2% (1%)	1% (1%)	3% (2%)	2% (2%)	2%

Base: People who have not yet booked (but have holiday intentions for 2025)
 In brackets the scores from a year ago.
 (The Dec '23 measurement involved a holiday in 2024)

Q: Are you already planning for your upcoming holiday?



More of the Dutch are planning to spend their next holiday outside Europe in 2025, than a year ago. Among the Dutch, the share of 'holidays in their own country' has remained more or less the same. Among French and British, the share of 'in their own country' is now lower than a year ago. Germans plan to enjoy their next holiday (elsewhere) in Europe to a higher extent. The Spanish have been newly added to this measurement and go on holiday in their own country relatively often.



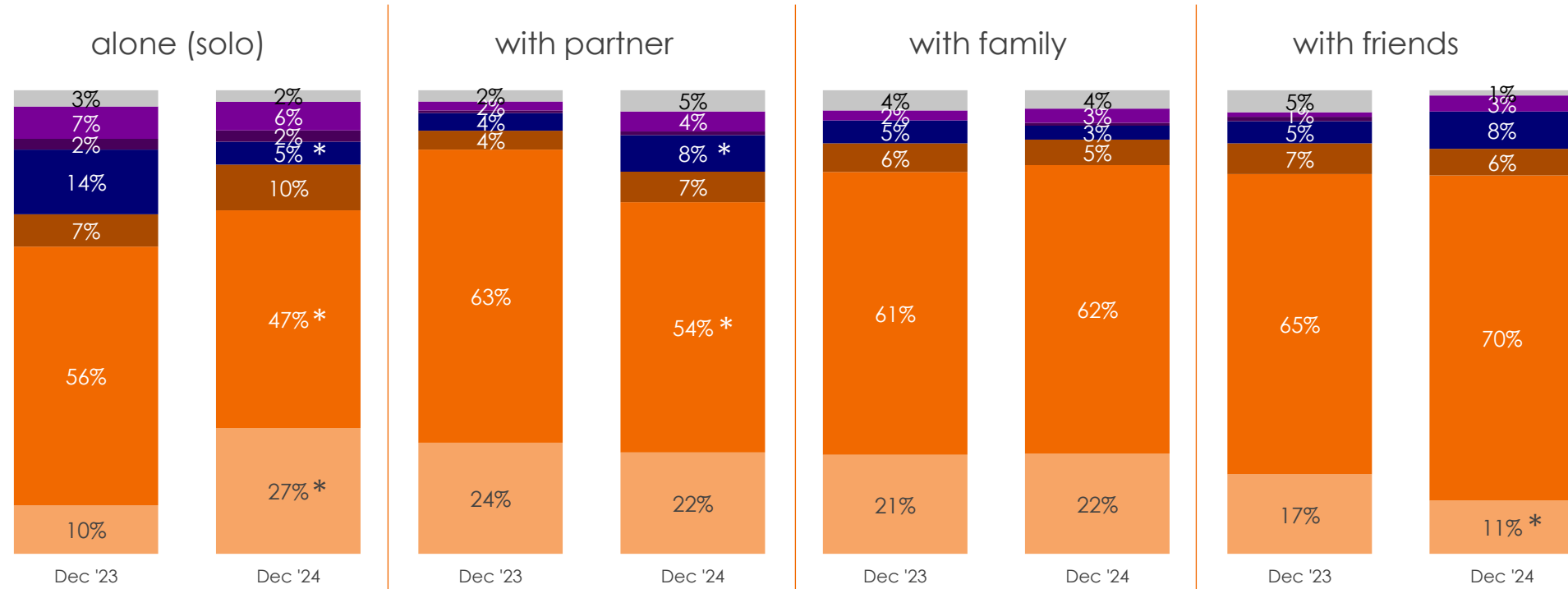
■ Own country
 ■ Europe
 ■ North/South America
 ■ Asia
 ■ Australia/Oceania
 ■ Africa
 ■ Don't know yet

Base: People with holiday plans in 2025 (booked or have yet to book).
 (a year ago, people were asked about plans for 2024)
 *: significant difference compared to the measurement 1 year ago

Q: In which destination do you plan to spend your next holiday (in 2025) mainly?



Dutch people going on holiday/touring alone are planning more holidays in their own country than a year ago. This is mainly 'at the expense' of holidays (elsewhere) in Europe and Asia. Groups of friends, on the other hand, are planning holidays in their own country to a lesser extent. Families show almost the same pattern as a year ago. Furthermore, Dutch couples are planning more holidays outside Europe.



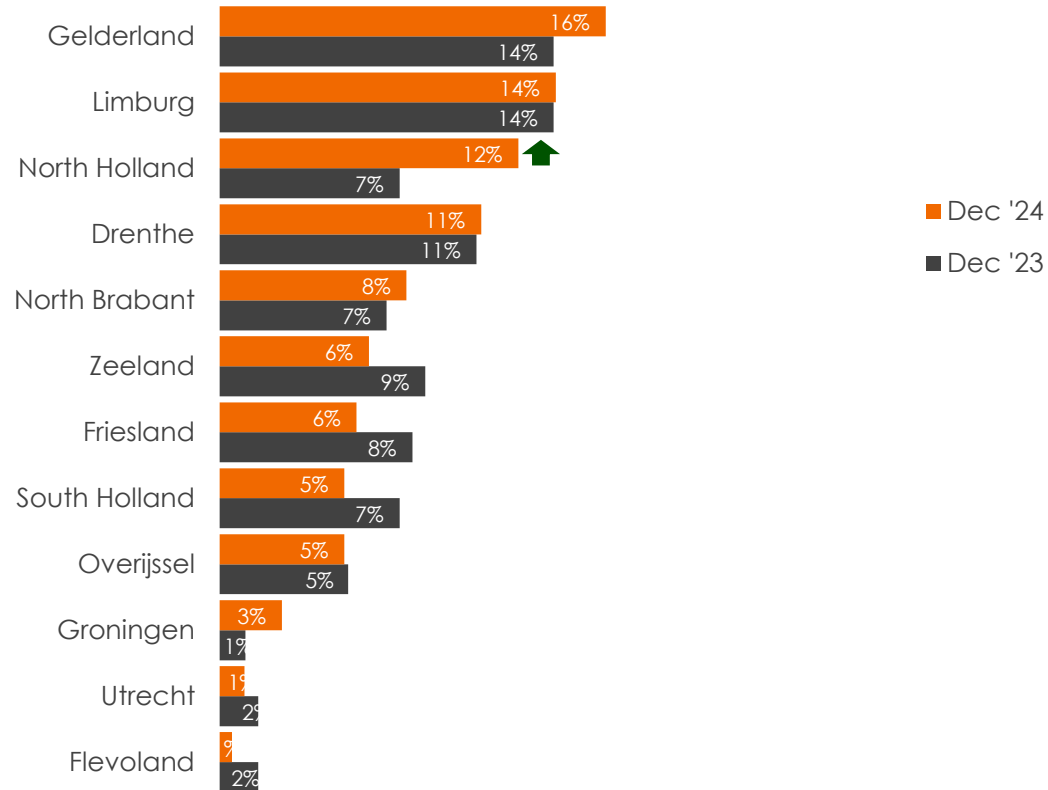
Own country Europe North/South America Asia Australia/Oceania Africa Don't know yet

Base: Dutch people with holiday plans in 2025 (booked or yet to book)
 Note: the most common travel company types are shown here
 *: significant difference compared to the measurement 1 year ago

Q: In which destination do you plan to spend your next holiday (in 2025) mainly?
 (in the Dec '23 measurement, it was about a holiday in 2024)

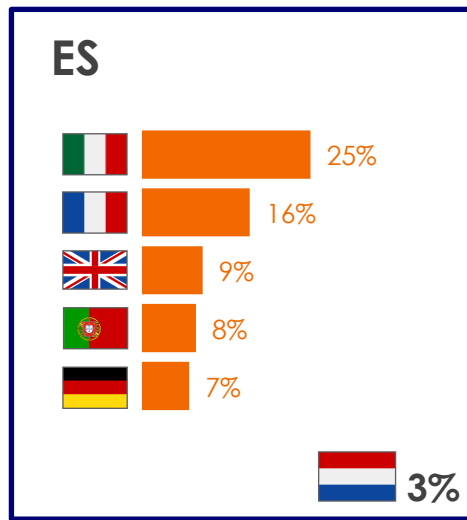
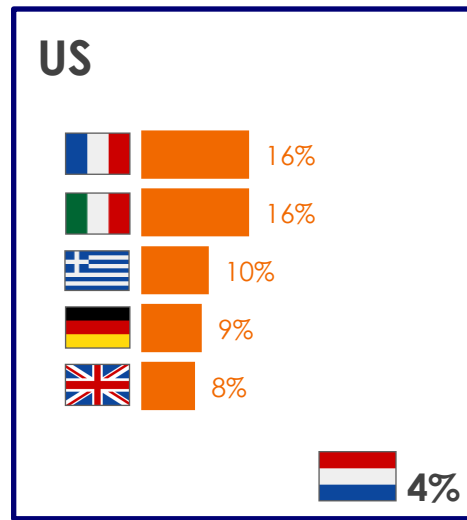
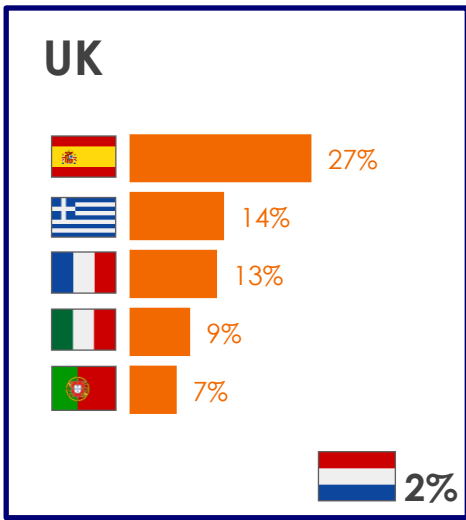
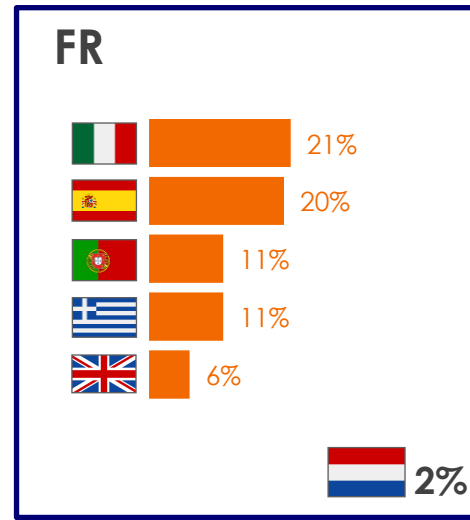
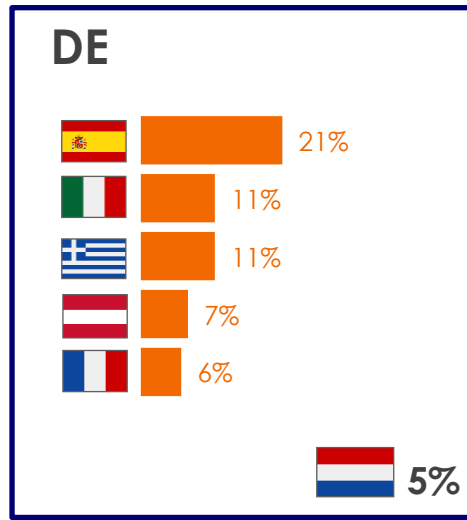
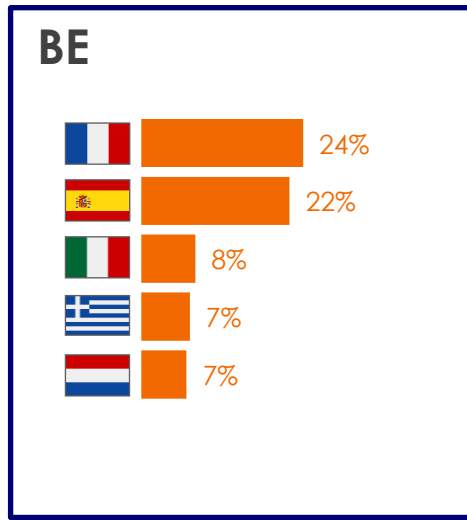
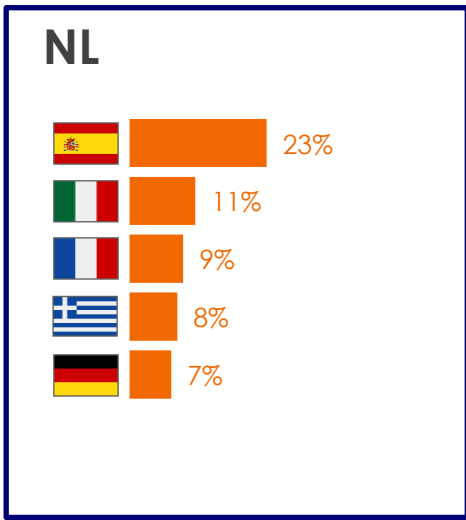


Dutch people who want to spend their next holiday in the Netherlands in 2025 say they would most like to do so in Gelderland (16%). This is followed by Limburg (14%), North Holland (12%) and Drenthe (11%). Compared to a year ago, plans for a holiday/weekend break in North Holland have increased.



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 2025 (in the Netherlands) mainly?
(in the Dec '23 measurement, it was about a holiday in 2024)



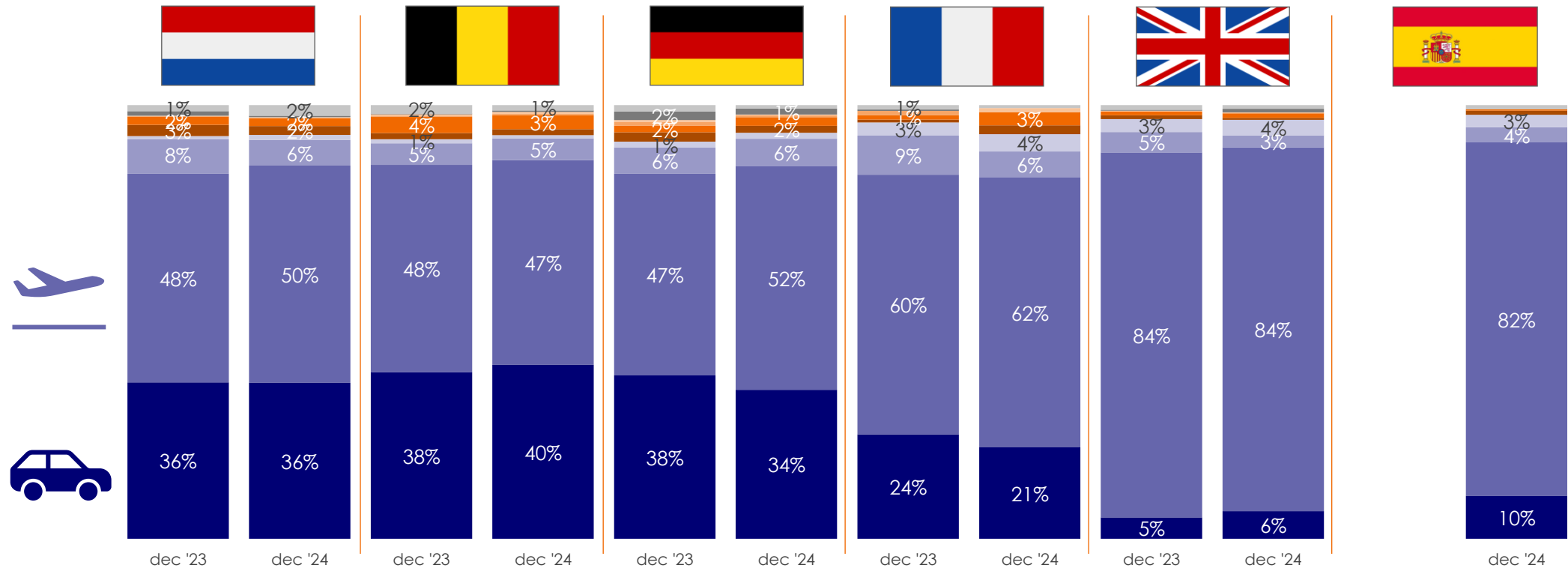
- Spain is the most popular European holiday country. Among the Dutch, Germans and British, Spain tops the top 5.
- Among Belgians, France is the favourite holiday country, followed by Spain. The Netherlands closes the top five among Belgians.
- Among Germans, the Netherlands ranks sixth, just outside the top five.
- Besides Spain, Italy and France are also popular holiday destinations in Europe.
- Greece is also popular. This country features in almost every top five, except for the Spanish.
- These top five European destinations exclude their own country as a holiday destination.

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 six countries, plane is the most frequently chosen means of transport for the next holiday in Europe (average 60%). Overall, the transport choice is similar to a year ago. Among the Dutch, Belgians and Germans, the car also scores relatively high. On average 5% of holidaymakers from these six countries consider the train for their next holiday in Europe.



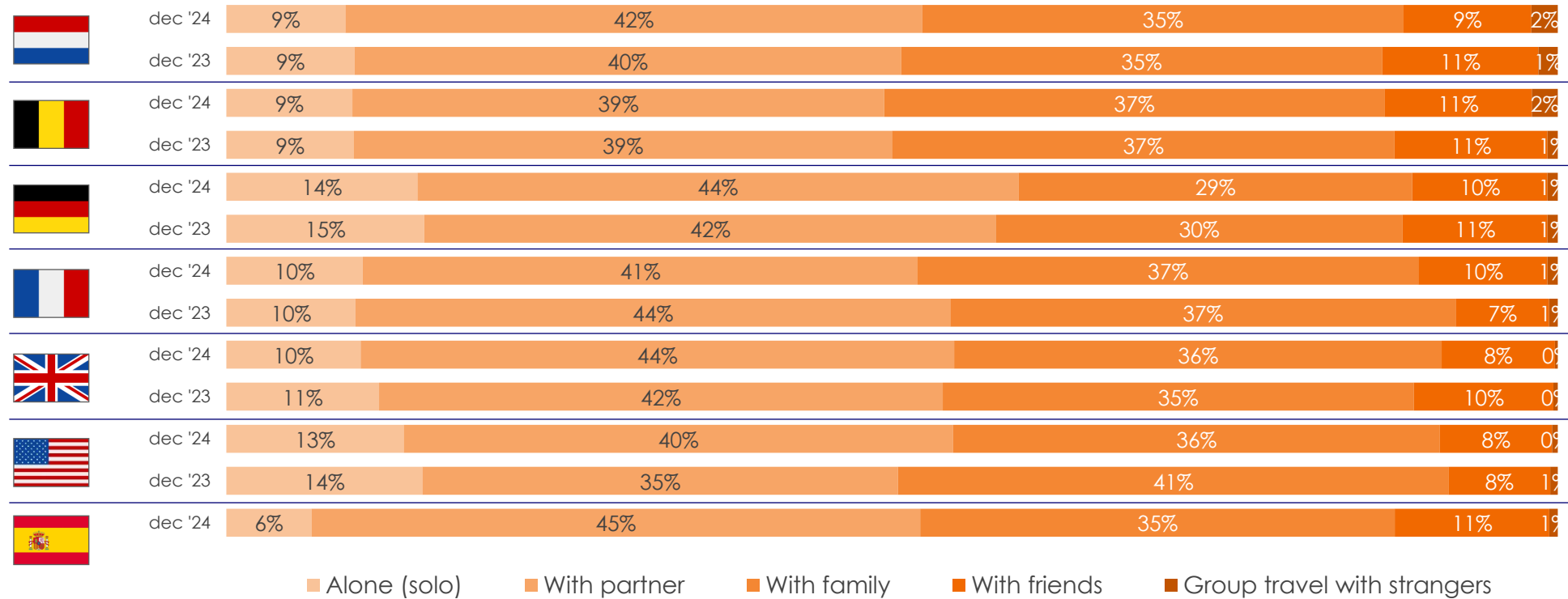
■ Car ■ Aeroplane ■ Train ■ Boat ■ Campervan/motorhome ■ Coach ■ Bicycle/moped/scooter ■ Motorbike ■ Other ■ Don't know yet

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?



On average, the largest group goes on holiday with their partner (average 42%), followed by a holiday with immediate family/other relatives (average 35%). Furthermore, on average 10% have plans for a solo trip and 10% for a holiday/touring with one or more friends. The number of solo travellers is highest among Germans and lowest among the Spanish.



Base: People with holiday plans for 2025 (booked or yet to book)

Q: With which travel company do you plan to take your next holiday (in 2025)?
(in the Dec '23 measurement, it was about a holiday in 2024)

Among Dutch people taking their next holiday alone/solo, the largest share is 45-54 years old. Among Dutch couples with holiday plans, the largest share is 65+ years (27%). The 35-44 age category is most strongly represented in the group going on holiday with immediate family/other relatives (29%). Dutch people going on holiday with friends/group of friends are relatively young. The largest share in that group is 18-24 years old.










	Alone (solo)	With partner	With family	With friends
18-24 years	6%	8%	13%	25%
25-34 years	21%	16%	20%	20%
35-44 years	17%	10%	29%	14%
45-54 years	26%	16%	21%	15%
55-64 years	14%	23%	9%	16%
65+ years	16%	27%	8%	10%

Base: People with holiday plans for 2025 (booked or yet to book)
 Highlight: highest percentage by group
 Note: the most common travel company types are shown here

Q: With which travel company do you plan to take your next holiday (in 2025)?

A hotel/guesthouse is the most popular type of accommodation (49% on average). This is followed by an apartment (average 13%) and renting accommodation from a private person (average 10%). A bungalow (park) is especially popular among Dutch people and shows an increase compared to a year ago. Renting from private individuals shows an increase among French and British compared to last year.



							
Hotel/guesthouse	41% (43%)	46% (48%)	51% (52%)	36% (35%)	52% (52%)	60% (57%)	55%
Bed and breakfast	4% (4%)	5% (7%)	3% (4%)	5% (7%)	4% (6%)	4% (4%)	3%
Apartment	15% (14%)	13% (12%)	22% (20%)	11% (12%)	10% (9%)	2% (2%)	16%
Bungalow(park)	14% (10%) ↑	6% (6%)	2% (2%)	6% (6%)	2% (2%)	1% (0%)	1%
Campsite	7% (9%)	4% (5%)	4% (4%)	6% (9%) ↓	2% (3%)	4% (4%)	2%
Group accommodation	1% (2%)	2% (1%)	0% (1%)	1% (1%)	1% (1%)	0% (1%)	1%
With a private individual (e.g. Airbnb)	6% (6%)	9% (7%)	6% (4%)	18% (14%) ↑	12% (9%) ↑	11% (9%)	7%
Boat	1% (1%)	1% (1%)	2% (2%)	1% (1%)	3% (2%)	4% (5%)	1%
Second home / permanent (camping) pitch	1% (1%)	3% (2%)	1% (1%)	2% (3%)	1% (1%)	1% (1%)	2%
Residence family/friends/relatives	5% (5%)	5% (7%)	5% (6%)	9% (8%)	6% (9%) ↓	9% (10%)	8%
Otherwise	2% (2%)	1% (1%)	2% (1%)	1% (1%)	3% (3%)	1% (2%)	1%

Base: People with holiday plans for 2025 (booked or yet to book).
 Highlight: 3 highest scores per country. Arrow: significant difference compared to the measurement a year ago.
 In brackets, the scores from a year ago.

Q: What type of accommodation do you plan to stay in during your next holiday in 2025?
 (in the Dec '23 measurement, it was about a holiday in 2024)

When holidaying in their own country, the Dutch most often choose a bungalow. This type of accommodation is chosen significantly more often than a year ago. A bungalow is also chosen more often for holidays elsewhere in Europe. However, a hotel/guesthouse remains the most popular type of accommodation there, followed by an apartment.



	At home	Elsewhere in Europe
Hotel/guesthouse	22% (25%)	46% (48%)
Bed and breakfast	7% (8%)	4% (2%)
Apartment	6% (6%)	20% (17%)
Bungalow(park)	44% (33%) ↑	7% (4%) ↑
Campsite	10% (13%)	8% (10%)
Group accommodation	1% (3%)	1% (2%)
With a private individual (e.g. Airbnb)	3% (5%)	6% (6%)
Boat	2% (2%)	0% (1%)
Second home / permanent (camping) pitch	1% (0%)	1% (1%)
Residence family/friends/relatives	3% (2%)	4% (5%)
Otherwise	1% (1%)	1% (2%)

Base: People with holiday plans for 2025 (booked or yet to book).
 Highlight: 3 highest scores per country. Arrow: significant difference compared to the measurement a year ago.
 In brackets the scores from a year ago. Arrow: significant difference.

Q: What type of accommodation do you plan to stay in during your next holiday in 2025?
 (in the Dec '23 measurement, it was about a holiday in 2024)

Beach holidays are the most frequently planned (average 23%). This is followed by holidays with friends/family (average 11%), nature holidays and city trips (both average 10%). Among the Dutch, a touring holiday scores relatively high.



Winter sports holiday	3%	3%	2%	4%	1%	1%
Beach holiday	21%	25%	31%	23%	25%	18%
Water sports holiday	0%	1%	1%	1%	0%	1%
Walking holiday	5%	6%	6%	1%	1%	2%
Cycling holiday	2%	2%	1%	1%	0%	0%
Other type of active holiday	3%	2%	2%	2%	3%	4%
Touring holiday	8%	4%	6%	2%	6%	3%
Cruise	1%	1%	2%	2%	6%	8%
Visiting event	1%	2%	2%	2%	3%	6%
City break	10%	8%	9%	9%	12%	9%
Cultural holidays	7%	9%	5%	13%	4%	6%
Visiting friends/family/etc	5%	5%	7%	9%	8%	12%
Nature holiday	11%	12%	14%	14%	6%	8%
Wellness holidays	3%	2%	4%	1%	2%	3%
Holidays with friends/family/etc	13%	13%	2%	11%	16%	13%
Culinary holidays	2%	2%	1%	1%	1%	2%
Shopping holiday (shopping)	1%	1%	2%	1%	1%	1%
Volunteer	0%	1%	0%	0%	0%	1%
Otherwise	5%	3%	3%	2%	3%	4%

Base: People with holiday plans for 2025 (booked or yet to book)
Highlight: 5 highest scores per country

Q: How would you characterise your next holiday?



A beach holiday appears in the top five in each of the travel group types and mostly at the top. A city trip also appears in every group; most often in holidays with friends (17%). A nature holiday is undertaken most often by couples (16%), but is also in the top 5 among the other groups. A touring holiday is mainly undertaken by solo travellers and couples. In addition, solo travellers often visit family/friends for a holiday (11%). A visit to a specific event is only in the top 5 for holidays with friends.



Alone (solo)	With partner	With family	With friends
1. Beach holidays (20%)	1. Beach holidays (20%)	1. Beach holiday (24%)	1. Holidays with friends or family (21%)
2. City break (15%)	2. Nature holidays (16%)	2. Holidays with friends or family (24%)	2. Beach holidays (18%)
3. Visiting family/friends (11%)	3. City break (11%)	3. Nature holidays (9%)	3. City break (17%)
4. Touring holiday (10%)	4. Touring holiday (8%)	4. City break (7%)	4. Cultural holidays (8%)
5. Nature holidays (7%)	5. Cultural holidays (7%)	5. Round trip & Cultural holidays (both 5%)	5. Visiting an event* & Nature holiday (both 7%)








* Visiting an event; such as festival, musical, Christmas market, cultural or sports event

Base: Dutch people with holiday plans for 2025 (booked or yet to book).
 Highlight: frequently mentioned categories.
 Note: The most common travel company types are shown here.

Q: With which travel company do you plan to take your next holiday (in 2025)?
 Q: How would you characterise your next holiday?



On average, flexible cancellation conditions are most important when choosing a holiday destination (on average 74% find this (very) important). This is followed by 'staying in a quiet place' (average 69%) and the much less chosen 'destination close to home' (average 29%) in third place. For the Dutch, the importance of flexible cancellation conditions is lowest compared to other countries and it is particularly high for the Spanish.








							
Flexible cancellation conditions	64% (63%)	70% (69%)	78% (77%)	78% (77%)	69% (71%)	75% (73%)	87%
Destination close to home	27% (27%)	29% (36%)	43% (40%)	31% (41%)	22% (29%)	25% (34%)	25%
Stay in quiet place	69% (67%)	76% (78%)	70% (74%)	77% (83%)	54% (58%)	64% (67%)	76%

Base: People with holiday plans for 2025 (booked or yet to book).
Percentage: top 2 (very important + important).
In brackets are the scores from a year ago.

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

People with a holiday intention in 2025 expect to spend their longest holidays of the year mostly in July and August (both 18% on average). This is similar to the measurement a year ago. Among Americans, June is the month most often chosen as the departure month for the longest holiday.










							
January	3%	2%	2%	3%	3%	6%	2%
February	4%	3%	3%	3%	4%	7%	3%
March	4%	4%	4%	3%	7%	7%	5%
April	5%	6%	7%	6%	9%	12%	5%
May	12%	11%	12%	10%	12%	11%	10%
June	14%	13%	14%	13%	14%	16%	11%
July	17%	25%	17%	21%	13%	13%	21%
August	19%	15%	18%	25%	15%	11%	23%
September	13%	12%	14%	9%	11%	4%	10%
October	4%	3%	4%	2%	4%	3%	3%
November	1%	1%	2%	1%	2%	2%	1%
December	1%	1%	1%	1%	3%	3%	2%
I don't know yet	3%	4%	4%	4%	4%	6%	3%
Total	100%	100%	100%	100%	100%	100%	100%

Base: People with a holiday intention for 2025 (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 2025)?
If the holiday falls in more than one month, select the month of departure.

Among the Dutch, Belgians, Germans and British, an average of 75% expect to spend their longest holidays of 2025 abroad. Among the French, home and abroad are equally chosen (both 47%). Among Americans and the Spanish, the majority plan to spend their longest holidays of the year at home (63% and 53% respectively).



							
At home (own country)	19%	15%	24%	47%	23%	63%	53%
Abroad	76%	81%	70%	47%	74%	30%	43%
Other, namely...	0%	1%	1%	1%	1%	2%	1%
I don't know (yet)	5%	4%	5%	5%	3%	5%	4%

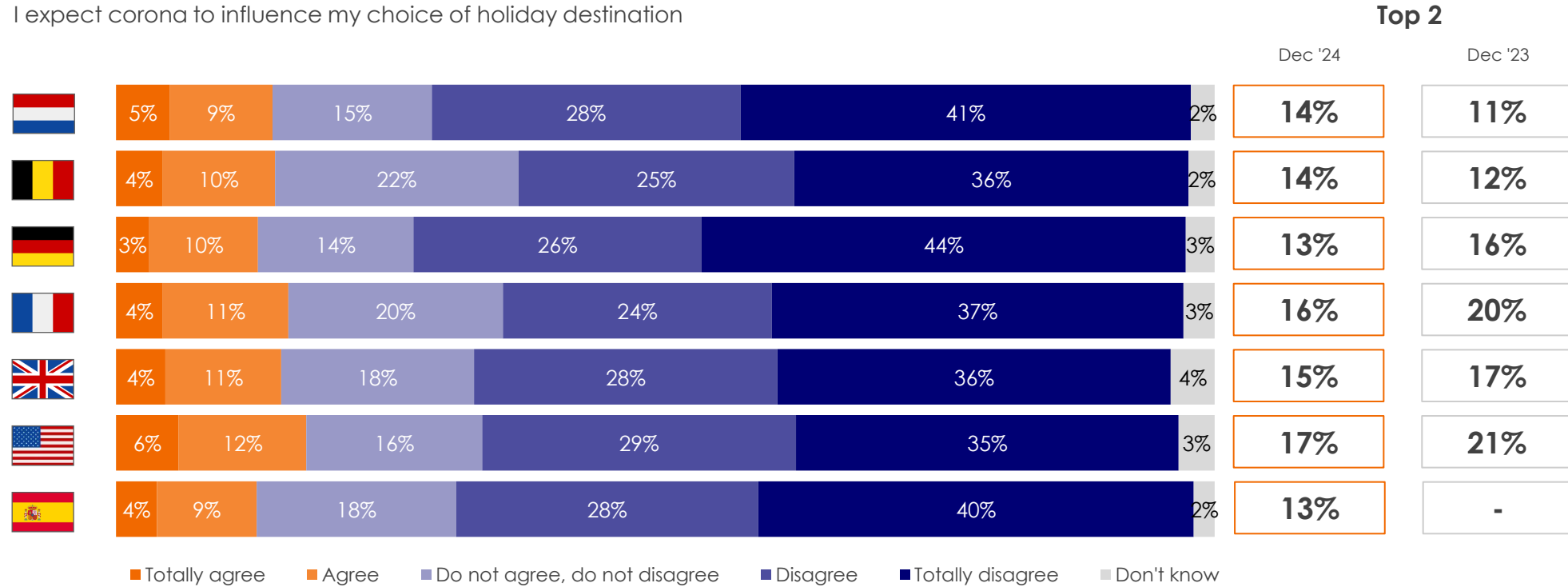
Base: People with holiday plans for 2025 (booked or yet to book)
 Highlight: highest score per country.

Q: Where do you expect to spend your longest holiday in 2025?

On average, 15% expect corona to influence their choice of holiday destination. The scores of the 7 countries below are close together; ranging from 13% among the Germans and Spanish to 17% among Americans.



I expect corona to influence my choice of holiday destination

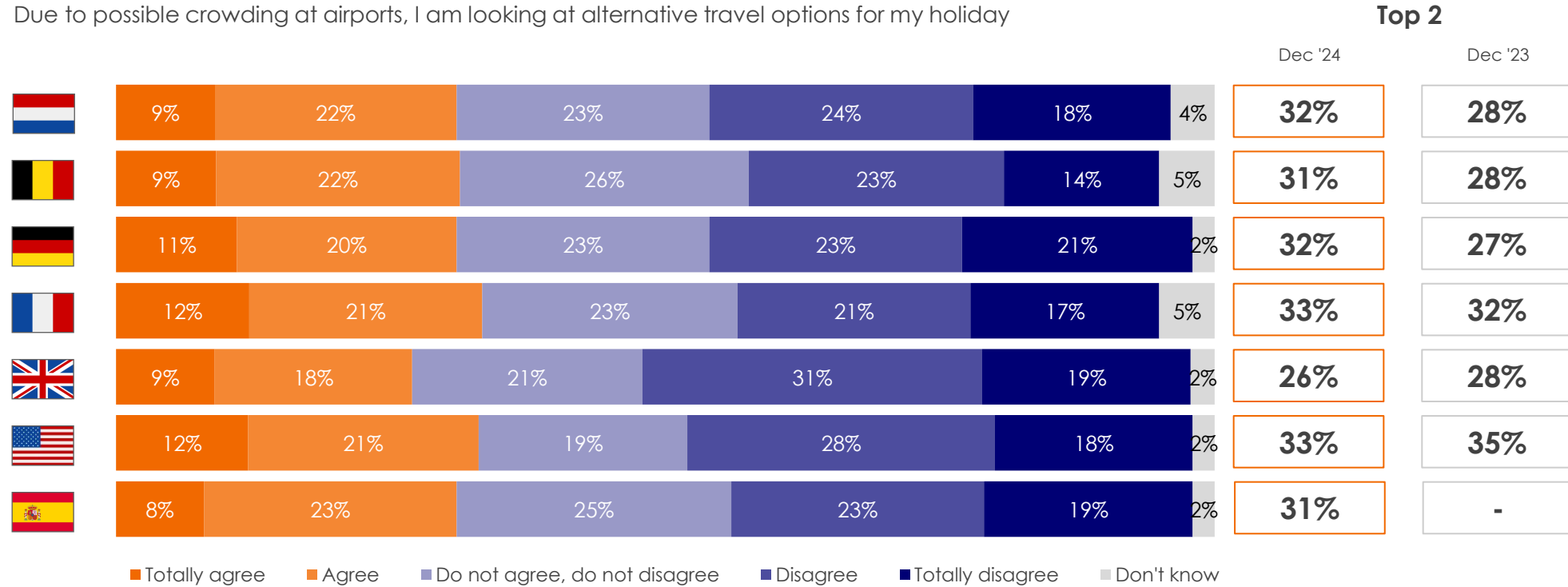


Base: everyone (entire sample)
Rounding differences may occur at the top 2%.



On average, 31% are looking at alternative travel options for their holidays because of possible crowding at airports. A year ago, this was similar at 30%. The British least agree with this statement, at 26%.

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

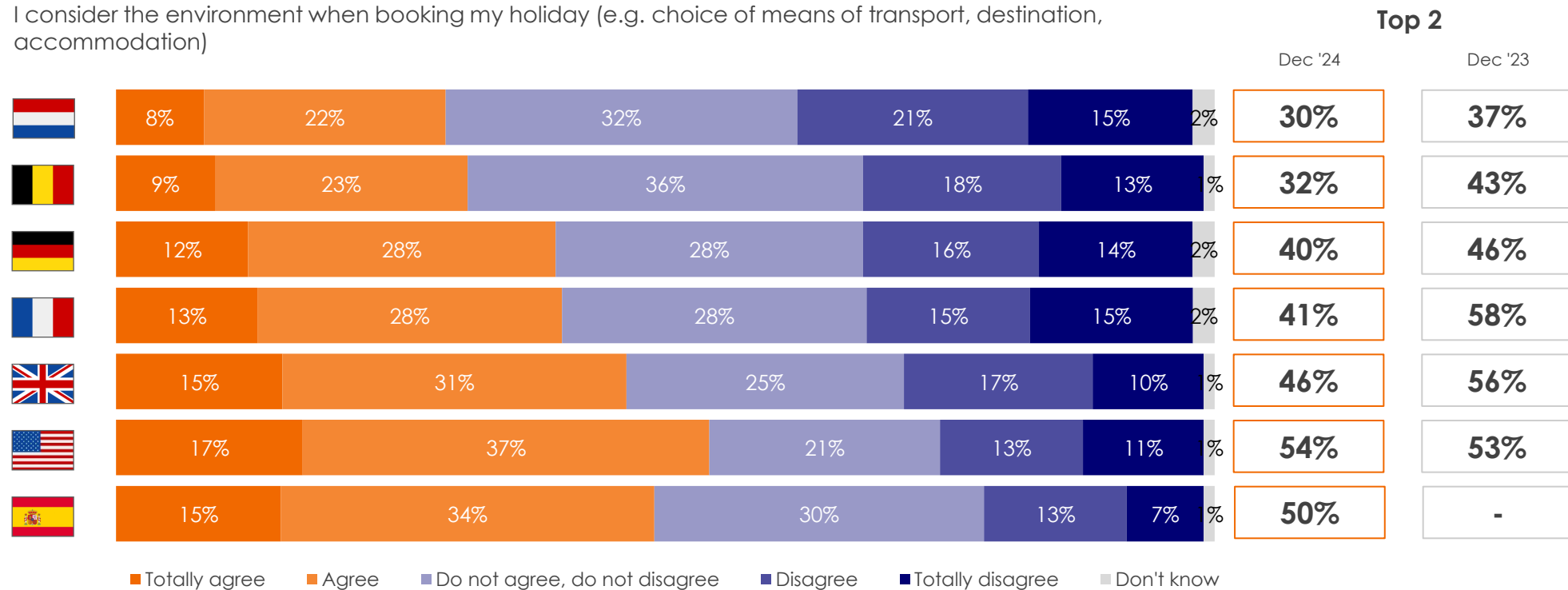


Base: everyone (entire sample)
Rounding differences may occur at the top 2%.



On average, 42% of all respondents (totally) agreed with the statement 'I take the environment into account when booking my holiday'. Last year, the average was 49% but then the statement was slightly different, namely 'I find it important to take the environment into account when booking my holiday'. Of the countries listed below, the Dutch agree with the statement to the least extent (30%).

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

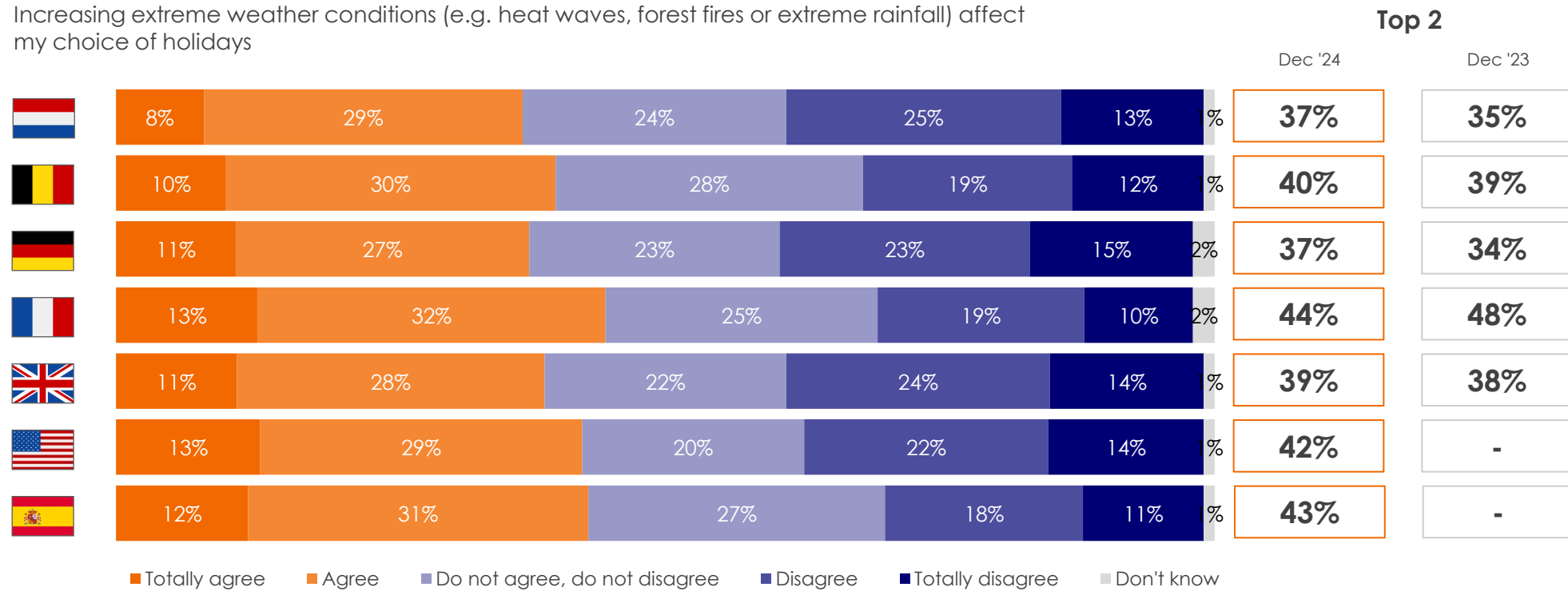


Base: everyone (entire sample)
Rounding differences may occur at the top 2%.



On average, 40% of those surveyed (totally) agree with the statement that increasing extreme weather conditions influence holiday choices. A year ago, this was similar (39%). The Dutch and Germans agree least with the statement (both 37%) and the French and Spanish the most (44% and 43% respectively).








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



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



As a result of increasing extreme weather conditions, people most often adjust the period when they go on holiday (mean 45%). This is followed by adjusting the destination (average 40%). Among Dutch people, adjusting the destination comes first. Conditions and insurance are important to many Americans when booking a holiday (due to risk of extreme weather).

							
I adjust my destination	60% (52%)	40% (30%)	53% (49%)	29% (27%)	35% (17%)	35% (21%)	33%
Adjusting my holiday period	39% (43%)	46% (54%)	45% (51%)	62% (66%)	45% (31%)	43% (25%)	36%
I book more last-minute	18% (18%)	15% (19%)	17% (17%)	18% (16%)	19% (27%)	21% (22%)	25%
I pay extra attention to conditions and insurance	16% (19%)	18% (19%)	19% (22%)	15% (19%)	28% (44%)	37% (46%)	34%
Other, namely	3% (3%)	3% (2%)	2% (0%)	2% (2%)	2% (3%)	1% (5%)	2%

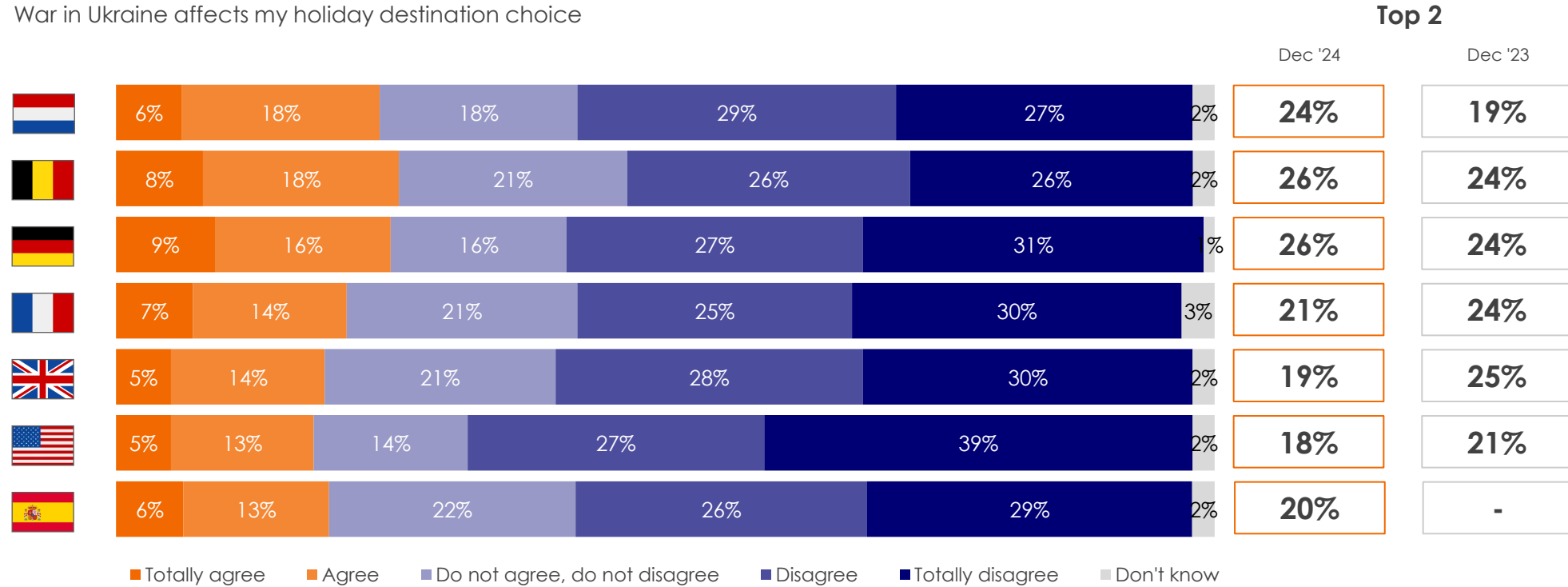
Base: people who agree with the statement that increasing extreme weather conditions influence holiday choices.
 Highlight: highest score per country.
 Scores in brackets are from April 2024 (no data is available from December 2023)

Question: How are increasing extreme weather conditions affecting your holiday choices?
 Multiple answers possible.



Just over a fifth of those surveyed (22%) say the war in Ukraine affects their choice of holiday destination. A year ago, this was 23% on average. Among Americans and British, this score is currently lowest (18% and 19% respectively) and highest among Belgians and Germans (both 26%)

War in Ukraine affects my holiday destination choice

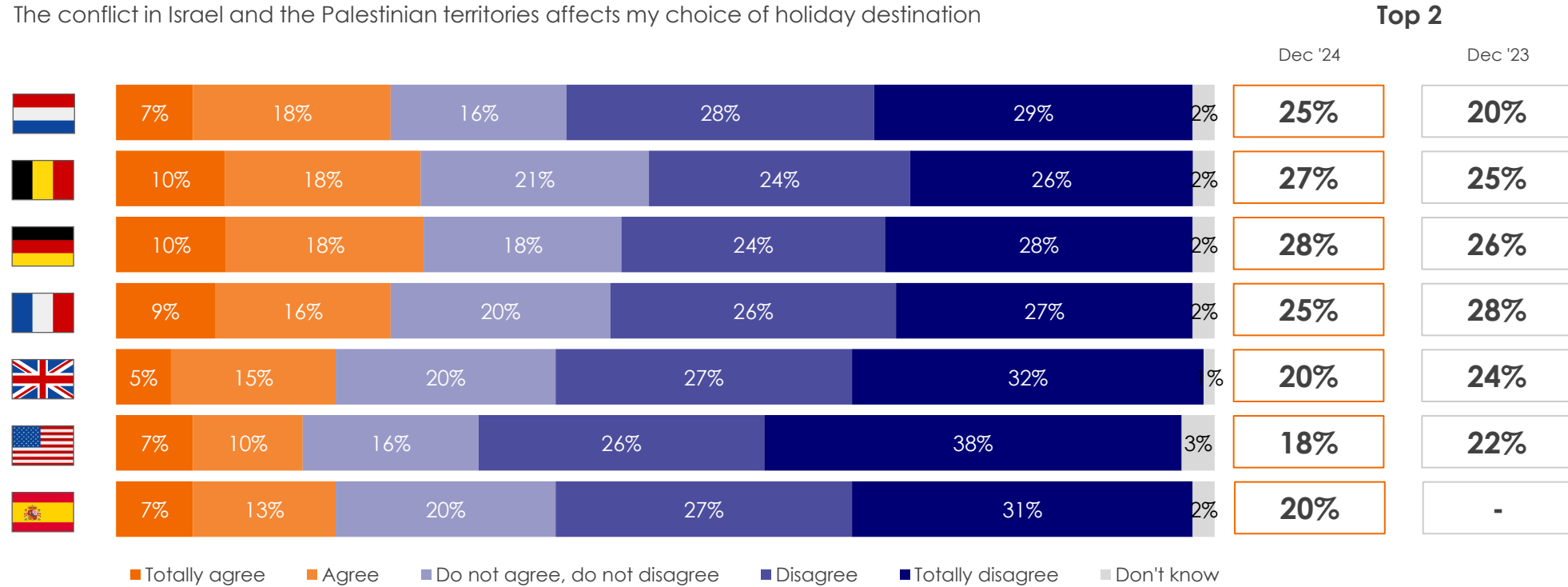


Base: everyone (entire sample)
 Rounding differences may occur at the top 2%.



About a quarter (23%) of those surveyed indicated that the conflict in Israel and the Palestinian territories affects their choice of holiday destination. A year ago, this was 24%. The top 2 scores currently range from 18% among Americans to 28% among Germans.

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

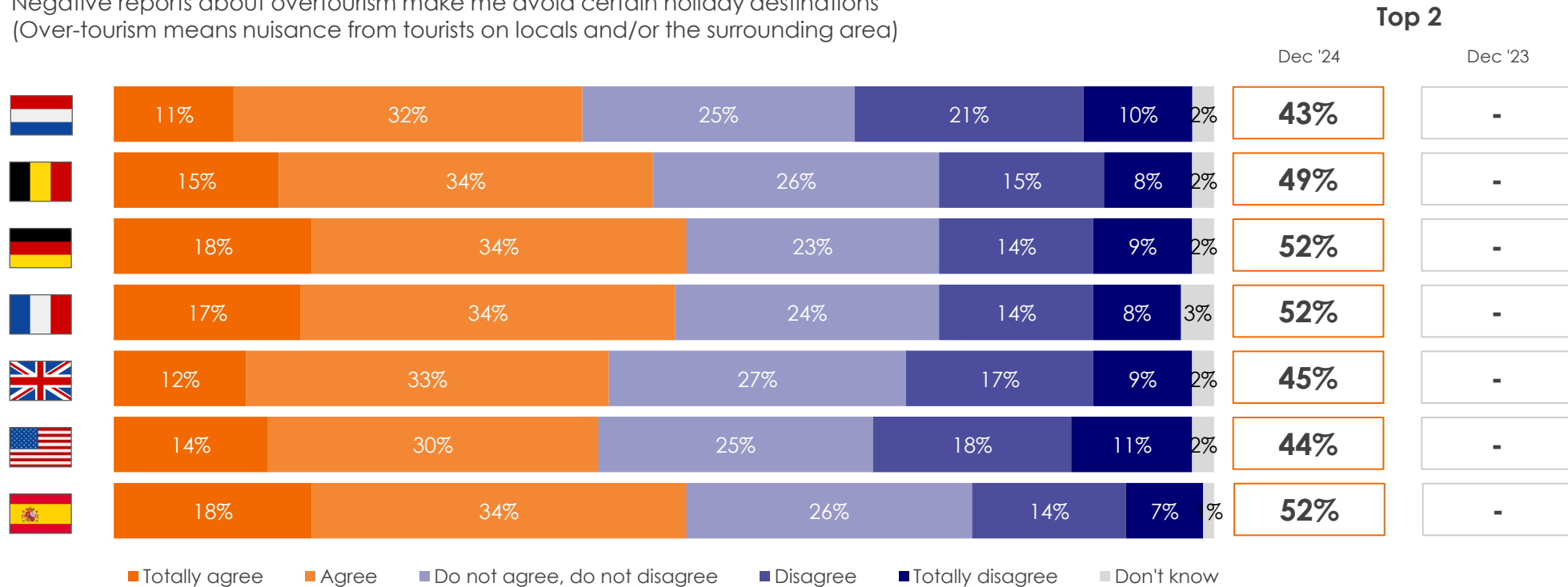


Base: everyone (entire sample)
Rounding differences may occur at the top 2%.



On average, 48% say they avoid certain holiday destinations due to negative reports of over-tourism. This score is lowest among Dutch and Americans (43% and 44%) and highest among Germans, French and Spaniards (all three 52%). Spain is by far the most mentioned holiday destination by Dutch people. This is followed e.g. by Turkey, Italy, Greece and Egypt, as well as Venice, Barcelona and Bali.

Negative reports about overtourism make me avoid certain holiday destinations
(Over-tourism means nuisance from tourists on locals and/or the surrounding area)



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

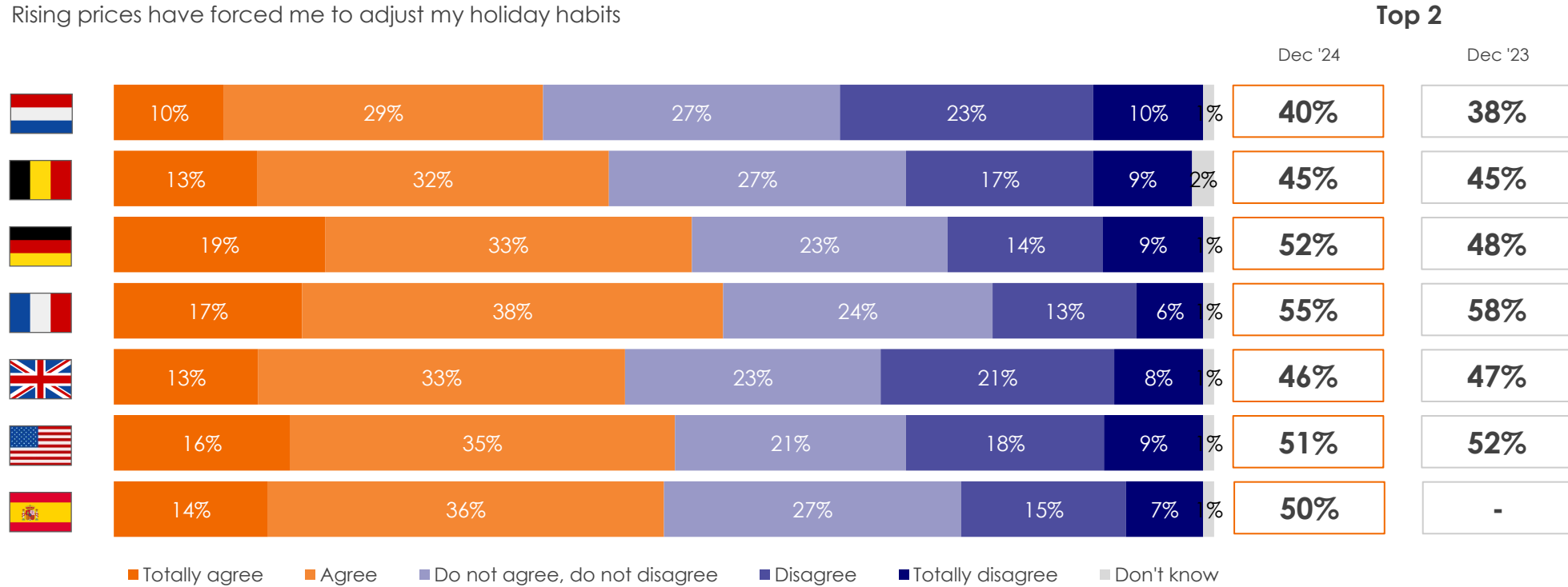


2. Impact of rising prices on holiday plans

Just under half (48% on average) say they are forced to adjust their holiday behaviour due to rising prices. A year ago, this was also 48% on average. Back then, it did include 'fuel, gas/energy, groceries etc' as an example. The French are still in highest agreement with this statement (55%) and the Dutch the least (40%).



Rising prices have forced me to adjust my holiday habits



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

If people adjust their holiday behaviour (because of higher prices), they do so mainly by going on holiday less often and/or choosing cheaper accommodation (both averaging 42%). This is followed by shortening their holidays (35% on average). Dutch people are more likely to choose cheaper accommodation as a saving measure now than a year ago.



Shorter holidays	29% (26%)	33% (28%)	31% (26%) ↑	34% (30%)	34% (31%)	39% (38%)	42%
Less frequent holidays	42% (41%)	44% (42%)	48% (45%)	42% (44%)	47% (46%)	43% (44%)	31%
Cheaper accommodation	45% (38%) ↑	36% (41%)	42% (47%)	40% (36%)	41% (48%) ↓	44% (41%)	50%
Cheaper transport	15% (18%)	12% (16%) ↓	11% (19%) ↓	17% (17%)	16% (22%) ↓	22% (26%)	17%
Save at destination itself	30% (34%)	23% (28%) ↓	25% (31%) ↓	29% (34%)	29% (27%)	33% (34%)	29%
Avoiding the high season	23% (27%)	21% (29%) ↓	27% (26%)	26% (22%)	30% (25%) ↑	25% (23%)	26%
Other, namely	3% (4%)	3% (3%)	3% (2%)	1% (1%)	3% (2%)	1% (5%)	2%

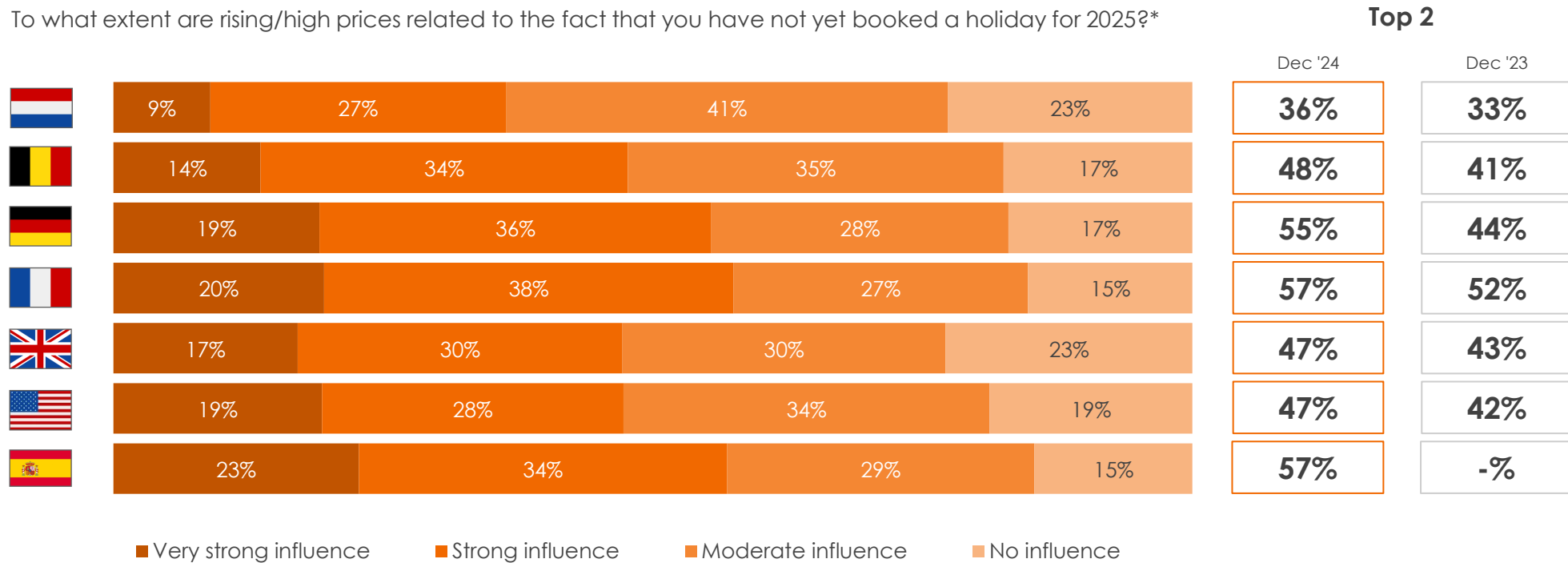
Base: People who (fully) agree with the statement 'Rising prices are forcing me to adjust my holiday behaviour'
 Highlight: the highest score from each country.
 In brackets, the scores from a year ago.

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

Of those who have holiday intentions but have not yet booked, 50% on average say that rising/high prices have a (very) strong influence on this. The top 2 scores currently range from 36% among the Dutch to 57% among the French and Spanish.



To what extent are rising/high prices related to the fact that you have not yet booked a holiday for 2025?*



*Note: In Dec '23, this question mentioned examples (of higher prices) such as fuel, gas/energy, groceries, that was omitted in Dec '24.

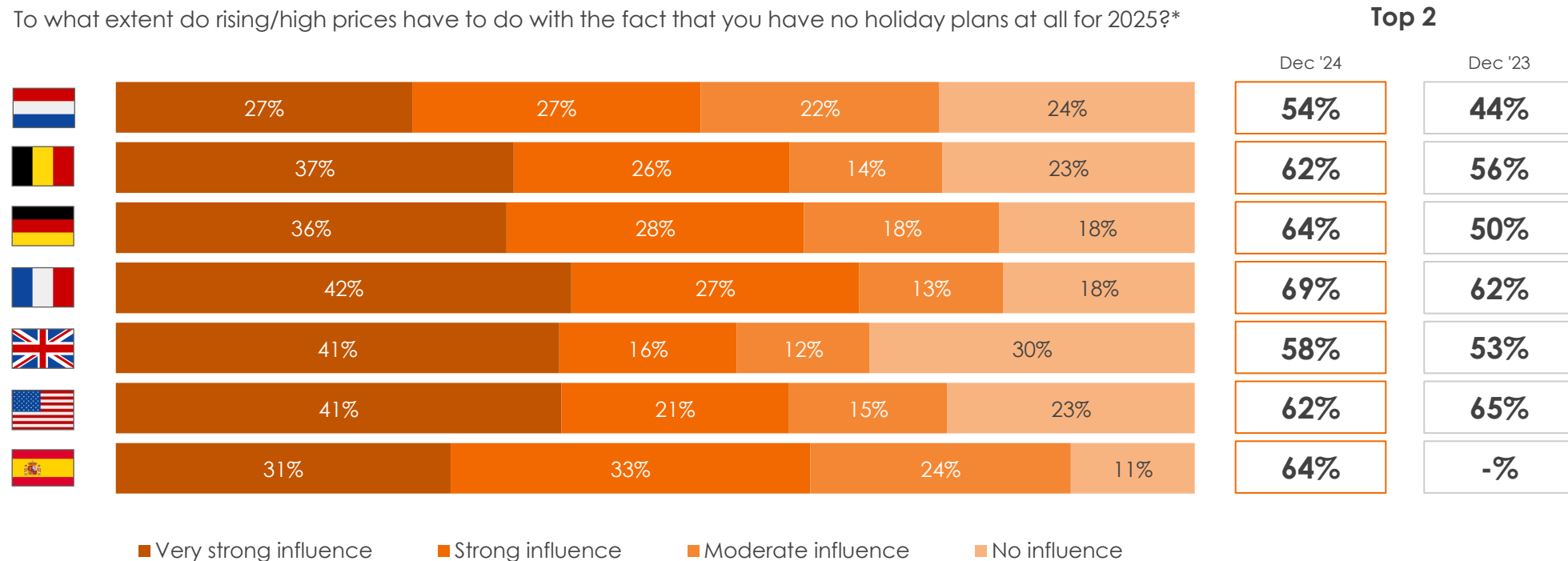
Base: People who have not yet booked but have holiday intentions for 2025. Rounding differences may occur at the top 2%.

Q: To what extent are rising/high prices related to the fact that you have not yet booked a holiday for 2025?

On average, 62% of people without holiday plans say that rising/high prices play a (very) big role in this. This score is lowest among Dutch people (54%) and highest among French people (69%).



To what extent do rising/high prices have to do with the fact that you have no holiday plans at all for 2025?*



*Note: In Dec '23, this question mentioned examples (of higher prices) such as fuel, gas/energy, groceries, that was omitted in Dec '24.

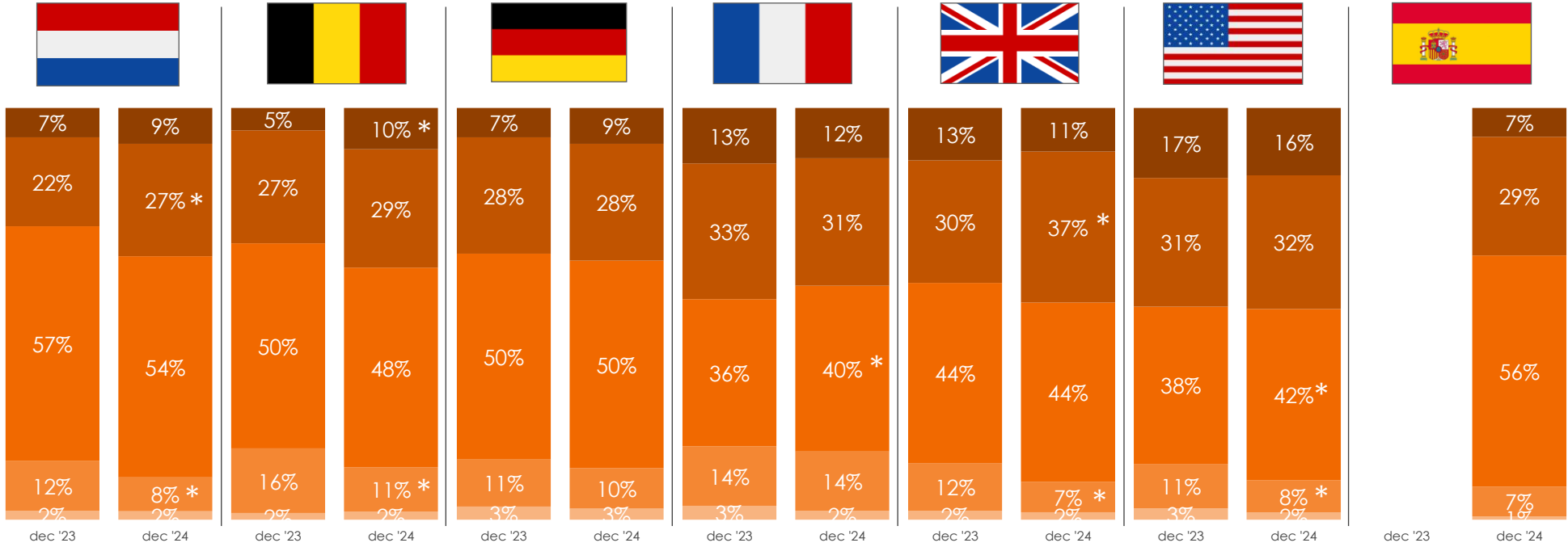
Base: People who currently have no holiday intention for 2025. Rounding differences may occur at the top 2%.

Q: To what extent do rising/high prices have to do with the fact that you have no holiday plans at all for 2025?

Of those with a holiday intention for 2025, an average of 48% say they have a similar holiday budget for the next holiday as in previous years. In addition, an average of 31% say they will have a slightly higher budget.



The holiday budget for my next holiday in 2025 is....



■ Much lower
 ■ Lower
 ■ Similar
 ■ Slightly higher
 ■ Much higher

Base: People with holiday plans for 2025 (booked or yet to book)
 (A year ago, people were asked about the year 2024)

Q: Which situation is most applicable to you?



© Jan Bijl Fotografie

Element	Description																								
Method:	Online																								
Target audience:	<table border="0"> <tr> <td>0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>12-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>2-measurement: NL/BE/DE/UK</td> <td>13-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>3-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>14-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>4-measurement: NL/BE/DE/UK</td> <td>15-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>5-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>16-measurement: NL/BE/DE/FR/UK/USA +CHINA</td> </tr> <tr> <td>6-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>17-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>7-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>18-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>8-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>19-measurement: NL/BE/DE/FR/UK/USA/CHINA*</td> </tr> <tr> <td>9-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>20 measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>10-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>21-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>11-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>22-measurement: NL/BE/DE/FR/UK/USA/ES</td> </tr> </table>	0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA	12-measurement: NL/BE/DE/FR/UK/USA	2-measurement: NL/BE/DE/UK	13-measurement: NL/BE/DE/FR/UK/USA	3-measurement: NL/BE/DE/FR/UK/USA/CHINA	14-measurement: NL/BE/DE/FR/UK/USA	4-measurement: NL/BE/DE/UK	15-measurement: NL/BE/DE/FR/UK/USA	5-measurement: NL/BE/DE/FR/UK/USA/CHINA	16-measurement: NL/BE/DE/FR/UK/USA +CHINA	6-measurement: NL/BE/DE/FR/UK/USA/CHINA	17-measurement: NL/BE/DE/FR/UK/USA	7-measurement: NL/BE/DE/FR/UK/USA/CHINA	18-measurement: NL/BE/DE/FR/UK/USA	8-measurement: NL/BE/DE/FR/UK/USA/CHINA	19-measurement: NL/BE/DE/FR/UK/USA/CHINA*	9-measurement: NL/BE/DE/FR/UK/USA/CHINA	20 measurement: NL/BE/DE/FR/UK/USA	10-measurement: NL/BE/DE/FR/UK/USA/CHINA	21-measurement: NL/BE/DE/FR/UK/USA	11-measurement: NL/BE/DE/FR/UK/USA/CHINA	22-measurement: NL/BE/DE/FR/UK/USA/ES		
0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA	12-measurement: NL/BE/DE/FR/UK/USA																								
2-measurement: NL/BE/DE/UK	13-measurement: NL/BE/DE/FR/UK/USA																								
3-measurement: NL/BE/DE/FR/UK/USA/CHINA	14-measurement: NL/BE/DE/FR/UK/USA																								
4-measurement: NL/BE/DE/UK	15-measurement: NL/BE/DE/FR/UK/USA																								
5-measurement: NL/BE/DE/FR/UK/USA/CHINA	16-measurement: NL/BE/DE/FR/UK/USA +CHINA																								
6-measurement: NL/BE/DE/FR/UK/USA/CHINA	17-measurement: NL/BE/DE/FR/UK/USA																								
7-measurement: NL/BE/DE/FR/UK/USA/CHINA	18-measurement: NL/BE/DE/FR/UK/USA																								
8-measurement: NL/BE/DE/FR/UK/USA/CHINA	19-measurement: NL/BE/DE/FR/UK/USA/CHINA*																								
9-measurement: NL/BE/DE/FR/UK/USA/CHINA	20 measurement: NL/BE/DE/FR/UK/USA																								
10-measurement: NL/BE/DE/FR/UK/USA/CHINA	21-measurement: NL/BE/DE/FR/UK/USA																								
11-measurement: NL/BE/DE/FR/UK/USA/CHINA	22-measurement: NL/BE/DE/FR/UK/USA/ES																								
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. *For China, the 19 measurement focused on major cities in Tier 1 and 2.																								
Fieldwork period:	<table border="0"> <tr> <td>0 measurement: 21 May to 1 Jun 2020</td> <td>11-measurement: 31 Mar to 6 Apr 2022</td> </tr> <tr> <td>1 measurement: 17 Jun to 26 Jun 2020</td> <td>12-measurement: 13 Jun to 21 Jun 2022</td> </tr> <tr> <td>2-measurement: 24 Jul / 28 Jul 2020</td> <td>13-measurement: 2 Sep to 8 Sep 2022</td> </tr> <tr> <td>3 measurement: 7 Sep to 18 Sep 2020</td> <td>14-measurement: 5 Dec to 9 Dec 2022</td> </tr> <tr> <td>4-measurement: 27 Oct to 1 Nov 2020</td> <td>15-measurement: 9 Mar to 14 Mar 2023</td> </tr> <tr> <td>5-measurement: 7 Jan to 13 Jan 2021</td> <td>16-measurement: 1 Jun to 7 Jun 2023</td> </tr> <tr> <td>6-measurement: 18 Mar to 23 Mar 2021</td> <td>17-measurement: 25 Aug to 31 Aug 2023</td> </tr> <tr> <td>7-measurement: 19 May to 25 May 2021</td> <td>18-measurement: 1 Dec to 8 Dec 2023</td> </tr> <tr> <td>8-measurement: 1 Jul to 6 Jul 2021</td> <td>19-measurement: 2 Apr to 8 Apr 2024</td> </tr> <tr> <td>9-measurement: 1 Sep to 7 Sep 2021</td> <td>20-measurement: 30 May to 5 Jun 2024</td> </tr> <tr> <td>10-measurement: 15 Nov to 21 Nov 2021</td> <td>21-measurement: 30 Aug to 6 Sep 2024</td> </tr> <tr> <td>11-measurement: 31 Mar to 6 Apr 2022</td> <td>22-measurement: 29 Nov to 5 Dec 2024</td> </tr> </table>	0 measurement: 21 May to 1 Jun 2020	11-measurement: 31 Mar to 6 Apr 2022	1 measurement: 17 Jun to 26 Jun 2020	12-measurement: 13 Jun to 21 Jun 2022	2-measurement: 24 Jul / 28 Jul 2020	13-measurement: 2 Sep to 8 Sep 2022	3 measurement: 7 Sep to 18 Sep 2020	14-measurement: 5 Dec to 9 Dec 2022	4-measurement: 27 Oct to 1 Nov 2020	15-measurement: 9 Mar to 14 Mar 2023	5-measurement: 7 Jan to 13 Jan 2021	16-measurement: 1 Jun to 7 Jun 2023	6-measurement: 18 Mar to 23 Mar 2021	17-measurement: 25 Aug to 31 Aug 2023	7-measurement: 19 May to 25 May 2021	18-measurement: 1 Dec to 8 Dec 2023	8-measurement: 1 Jul to 6 Jul 2021	19-measurement: 2 Apr to 8 Apr 2024	9-measurement: 1 Sep to 7 Sep 2021	20-measurement: 30 May to 5 Jun 2024	10-measurement: 15 Nov to 21 Nov 2021	21-measurement: 30 Aug to 6 Sep 2024	11-measurement: 31 Mar to 6 Apr 2022	22-measurement: 29 Nov to 5 Dec 2024
0 measurement: 21 May to 1 Jun 2020	11-measurement: 31 Mar to 6 Apr 2022																								
1 measurement: 17 Jun to 26 Jun 2020	12-measurement: 13 Jun to 21 Jun 2022																								
2-measurement: 24 Jul / 28 Jul 2020	13-measurement: 2 Sep to 8 Sep 2022																								
3 measurement: 7 Sep to 18 Sep 2020	14-measurement: 5 Dec to 9 Dec 2022																								
4-measurement: 27 Oct to 1 Nov 2020	15-measurement: 9 Mar to 14 Mar 2023																								
5-measurement: 7 Jan to 13 Jan 2021	16-measurement: 1 Jun to 7 Jun 2023																								
6-measurement: 18 Mar to 23 Mar 2021	17-measurement: 25 Aug to 31 Aug 2023																								
7-measurement: 19 May to 25 May 2021	18-measurement: 1 Dec to 8 Dec 2023																								
8-measurement: 1 Jul to 6 Jul 2021	19-measurement: 2 Apr to 8 Apr 2024																								
9-measurement: 1 Sep to 7 Sep 2021	20-measurement: 30 May to 5 Jun 2024																								
10-measurement: 15 Nov to 21 Nov 2021	21-measurement: 30 Aug to 6 Sep 2024																								
11-measurement: 31 Mar to 6 Apr 2022	22-measurement: 29 Nov to 5 Dec 2024																								





NBTC

Nederlands Bureau
voor Toerisme &
Congressen