

Holiday Sentiment Monitor

Results 16-measurement

July 2023



1	
Main results	6
2	
Impact of rising prices on travel behaviour	32
3	
Business travel	38
4	
China	41
5	
Annex	61

Take outs



- 1. Almost 9 in 10 have a holiday intention for the next 12 months.**

On average, 86% of those surveyed intend to go on holiday in the next 12 months. This intention is highest among the British (90%). Among the other five countries, including the Netherlands, holiday intention is at least 85%.
- 2. Almost 50% have already booked a holiday, many of them leaving in July.**

The share that has already booked a holiday has increased further since the March 2023 measurement. The share that has already booked is highest in the UK (55%) and lowest in the US (41%). Of those who have already booked, an average of 34% say they will go in July, 22% in June and 20% in August. In terms of household type/living situation, only 30% of Dutch people living alone have booked holidays, compared to 60% of families.
- 3. Market potential: around 40% of respondents have holiday intentions but have yet to book. Of these, 65% are already planning.**

Some 4 in 10 say they have yet to book, but have holiday intentions for the next 12 months. Of that group, 65% are already planning. Their main focus is August (average 28%), with September and July in second and third place (24% and 22% respectively). Of the group that is already planning a holiday, the majority are planning to book within 3 to 4 weeks (average 31%) and an average of 28% say they intend to book within 1 to 3 months. If people have holiday intentions but are not yet planning, it is mainly because they have not yet had time to do so (average 20%) or their financial situation does not allow it (average 10%).
- 4. Fewer holiday plans at home than in previous two summers.**

The Dutch, Belgians, Germans and British largely plan to spend their next holiday(s) elsewhere in Europe. Among the French and Americans, plans to take their next holiday in their own country are predominant. Among Dutch people with holiday intentions, an average of 22% have plans for a holiday in their own country. In the previous two summers, the Dutch staycation share was twice as high. Incidentally, for all countries, except the United States, staycation plans have decreased significantly compared to the previous two summers. Holidays in European countries such as Spain, Greece, Italy and France are still very popular.
- 5. Drenthe and Limburg most considered for holidays at home.**

In June '23, Dutch people - who want to spend their next holiday in the Netherlands - said their preferred destination is Drenthe or Limburg (13% and 12% respectively). In joint third place are Friesland, Noord-Holland and Zeeland (all at 9%).



Take outs



6. **Aeroplane most chosen for European holiday.**
The plane was the most frequently chosen means of transport by respondents for their next holiday in Europe (average 55%). Among the Dutch, Belgians and Germans, the car also scores relatively high. Furthermore, the French consider going by train more than residents from the other countries.
7. **Flexible cancellation conditions, staying in a quiet place and rising prices are still most important factors for choice of holiday destination.**
70% of people with holiday intentions consider flexible cancellation conditions (very) important when choosing a holiday destination. They also value staying in a quiet place and in third place are rising prices. Staying in a quiet place is considered most important by the French (81%) and significantly less by the British (57%).
8. **Half of respondents adjust holiday behaviour due to inflation**
Half of people (50% on average) say they have been forced to adjust their holiday behaviour because of increased prices. The French agree with this statement the most (57%) and the Dutch the least (42%). In June 2023, people indicated that if they adjust their holiday behaviour (due to higher prices), they will mainly do so by choosing cheaper accommodation/ lodging (44% on average) or by going on holiday less often (43% on average). The least chosen options were saving on transport (20% on average) and avoiding the high season (22% on average).
9. **17% of the Dutch have taken a business trip and 19% intend to.**
The Belgians (13%) and the Dutch (17%) have undertaken the least number of business trips (including overnight stays) at home or abroad. Americans have taken the most business trips (30%), mainly involving business trips at home. When looking at the next 12 months, 19% of Dutch people, 25% (each) of British and French and 32% of Americans plan to undertake a business trip.



Take outs



10.

Included again in this survey: the Chinese traveller

This edition of the Holiday Sentiment Monitor also includes the Chinese target group. It has been possible to travel from China again since early 2023. However, the Chinese economy is still suffering from the effects of Corona and this is reflected in the travel sentiment of Chinese consumers. We can see that – as was the case in Europe after Corona – residents of China are often opting to holiday at home or in one of their neighbouring countries. Flight capacity to Europe is still not at pre-2020 levels. The same applies to visa issuing capacity. This has a dampening effect on the number of Chinese visitors to the Netherlands.

Nevertheless, 88% of those surveyed from China* say they have a holiday intention for the next 12 months. 37% of the total have already booked a holiday and 51% have yet to book. The majority will go on holiday with their immediate family/other relatives (39%), followed by a holiday with partner (29%). Those who have already booked have mostly done so directly with the provider (52%) and these mainly involve holidays in July (28%). Current bookings were mainly made in Q1 and Q2 of 2023, reflecting the fact that strict corona-related travel restrictions in China had been lifted, making travel possible again.

In terms of type of accommodation, people mainly plan to stay in hotels (63%) and in terms of holiday-type, tours (19%) and nature holidays (17%) top the list. Of those who have not yet booked but are looking, they are mostly looking at October (28%) and September (20%). Of the Chinese target group questioned, two-thirds (66%) indicated that they have a slightly higher or much higher holiday budget than in previous years. This could be due to an increased amount of saving during the extensive Corona lockdown period.

*see slide 42 for more information on this target group



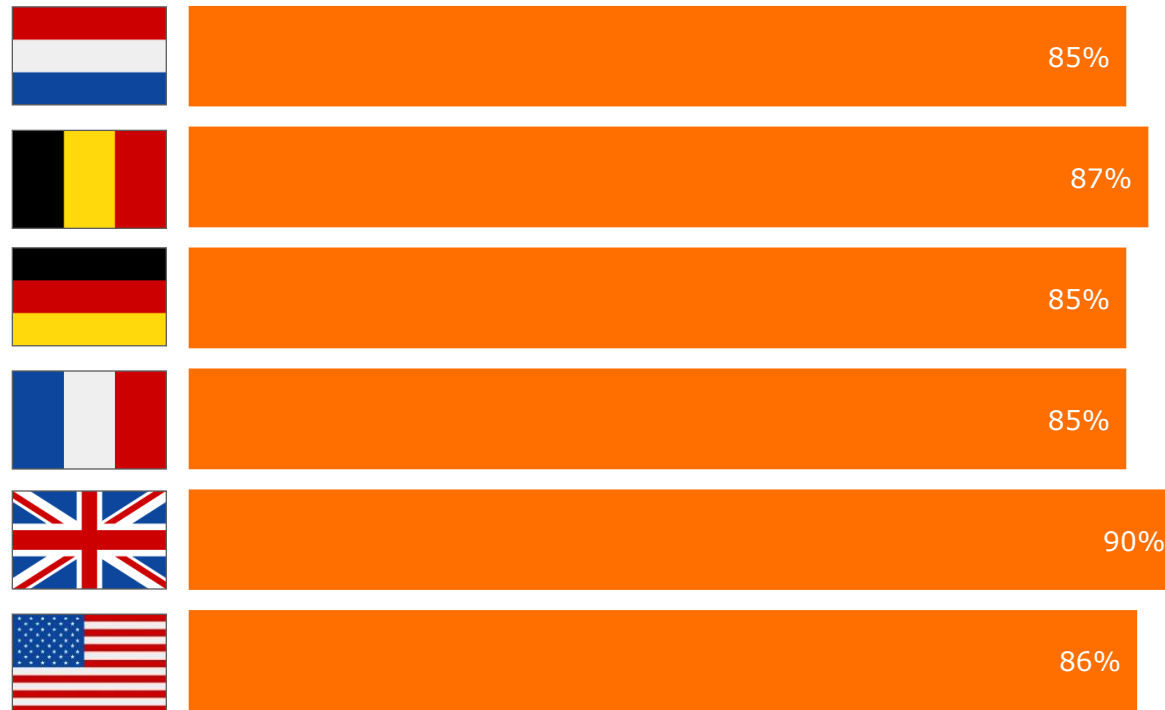


1. Main results





Holiday intention for the next 12 months is highest among the British (90%), followed by Belgians (87%). Holiday intention is 85% or above for all countries below. On average, 86% of respondents from these six countries have the intention to go on holiday in the next 12 months, some of whom have already booked and some of whom have yet to book. These may be short or long holidays at home or abroad.

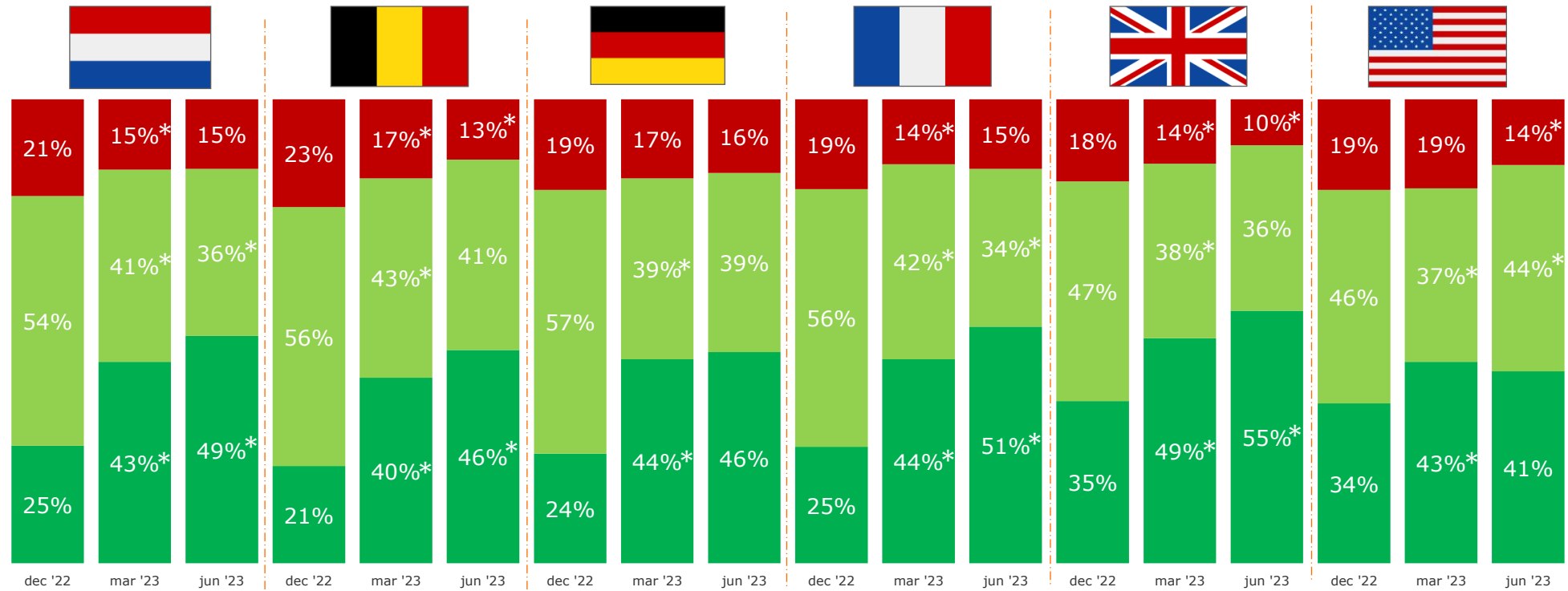


Holiday intention for next 12 months (% top 2):

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



On average, 48% have already booked a holiday for the next 12 months. In March 2023, the figure was 44%. The British currently have the highest proportion 'already booked' (55%), followed by the French (51%). Among Americans, this share is the lowest (41%).



■ Yes, already booked

■ Yes, but have yet to book

■ No, no intention

Base: everyone (entire sample)

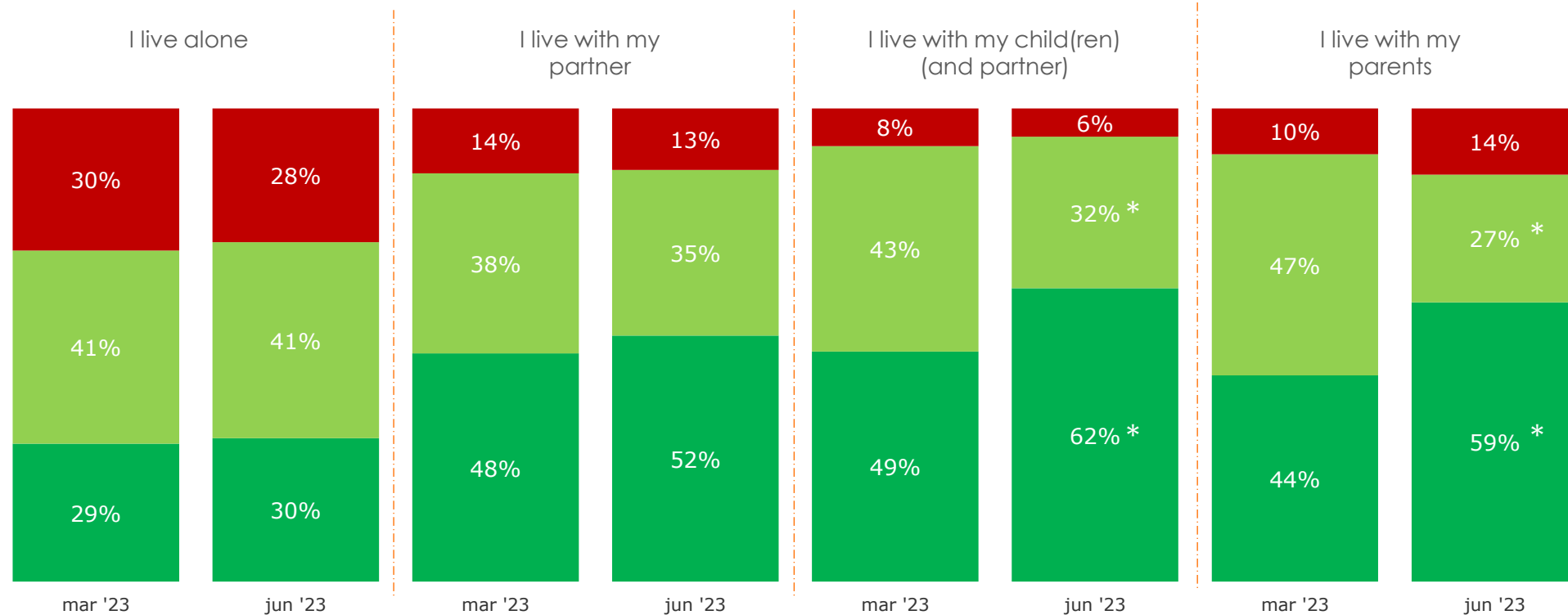
*: significant difference compared to previous measurement


Q: Do you currently intend to go on holiday sometime in the next 12 months?





Compared to March 2023, holiday intentions mainly converted into bookings among Dutch people living with child(ren) (and partner) and Dutch people living with their parents. Within both of these groups, around 60% have already booked. Among people living alone, only 30% have booked a holiday for the next 12 months.



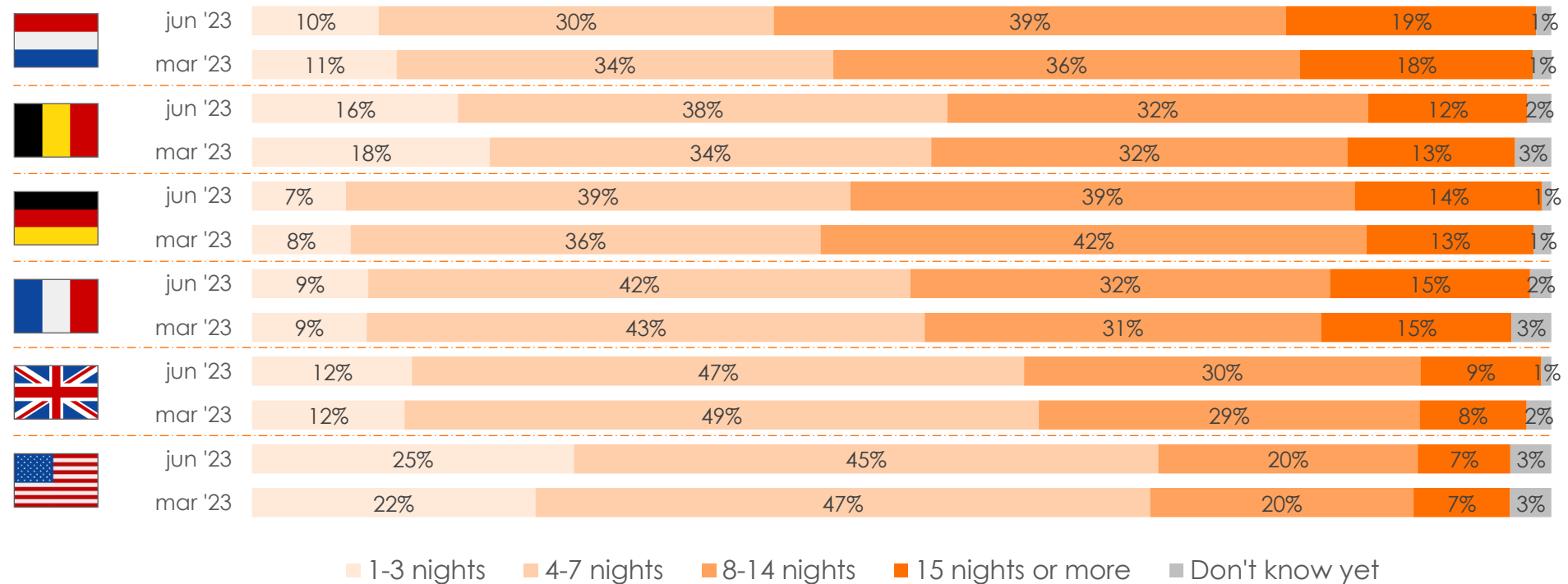
 ■ Yes, already booked ■ Yes, but have yet to book ■ No, no intention

Base: Dutch people (entire sample)
Note: the most common household/living situation types are shown here
*: significant difference compared to previous measurement

Q: Do you currently intend to go on holiday sometime in the next 12 months?



On average, the majority of those surveyed with a holiday intention are going away for 4-7 nights for their next holiday (averaging 40%). After that, the 8-14 nights category is the most chosen (averaging 32%). In March 2023, these averages were exactly the same. Among Americans, the proportion of short holidays is highest compared to the other countries; 25% go away for 1-3 nights. Among the Dutch, 8-14 nights is the most chosen category.

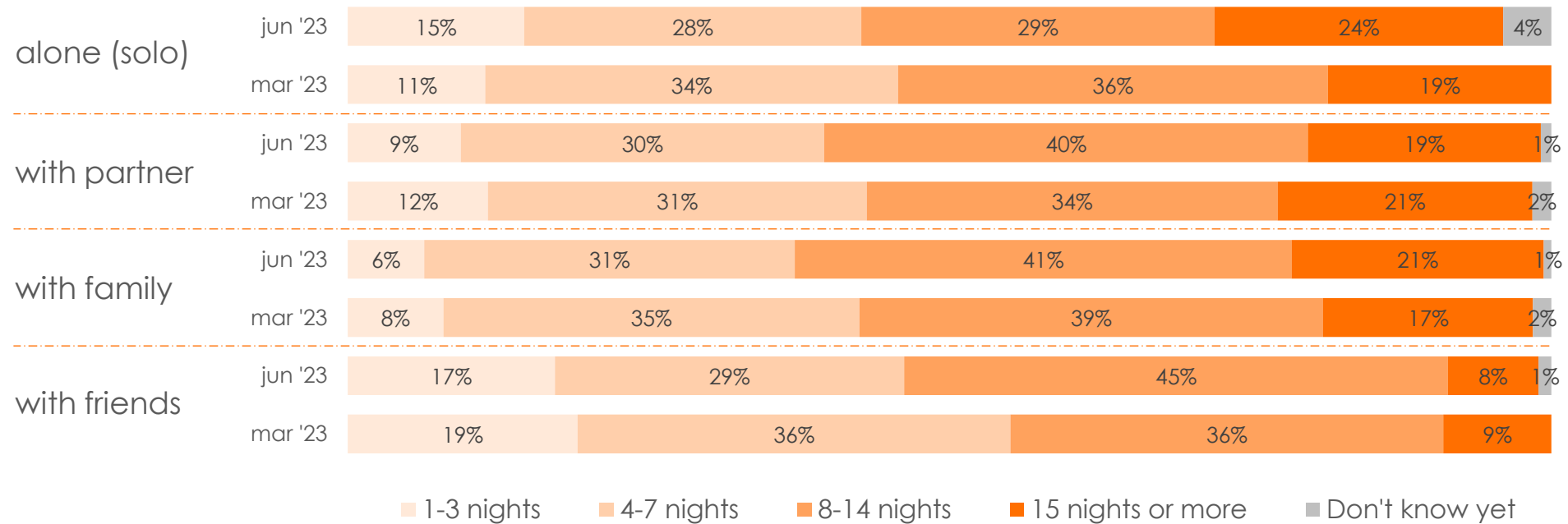


Base: People with holiday plans for the next 12 months (booked or yet to book)

Q: How long do you plan to be away on your next holiday (in the next 12 months)?



When holidaying with friends, a short trip (1-3 nights) is relatively popular. A holiday of 15 nights or more is currently most commonly planned by Dutch people travelling alone (increased from 19% in March 2023 to 24%). Compared to March 2023, the 8-14 nights category has increased significantly for those travelling with friends (from 36% to 45%).









Base: People with holiday plans for the next 12 months (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 the next 12 months)?



The majority of Americans who have already booked a holiday say they did so directly with the provider. Among Germans and Dutch, this is a significantly smaller proportion; they more often booked through a travel organisation or booking website.

						
Directly with the provider (e.g. the hotel/ accommodation/transport company)	42% (46%)	45% (41%)	41% (40%)	51% (49%)	48% (48%)	57% (59%)
Through a travel agent/ -agency or booking website	45% (43%)	42% (43%)	43% (45%)	33% (35%)	38% (37%)	25% (22%)
A combination of the above two options	8% (8%)	7% (8%)	12% (11%)	11% (12%)	11% (11%)	13% (14%)
Other, namely	5% (3%)	5% (7%)	3% (4%)	4% (4%)	2% (3%)	3% (4%)
Don't know	0% (0%)	0% (1%)	1% (1%)	1% (1%)	0% (1%)	2% (2%)







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

Base: People who have already booked a holiday in the next 12 months
Highlighted: the highest percentage by country
In brackets the score of the previous measurement (March 2023)

Q: How is your next holiday booked?



Among those who have already booked a holiday, the next holiday is mostly in July (average 34%), June (average 22%) and August (average 20%). Among the Belgians and French in particular, July stands out. Among the British, September also scores relatively high, as the departure month for the next holiday (18%).

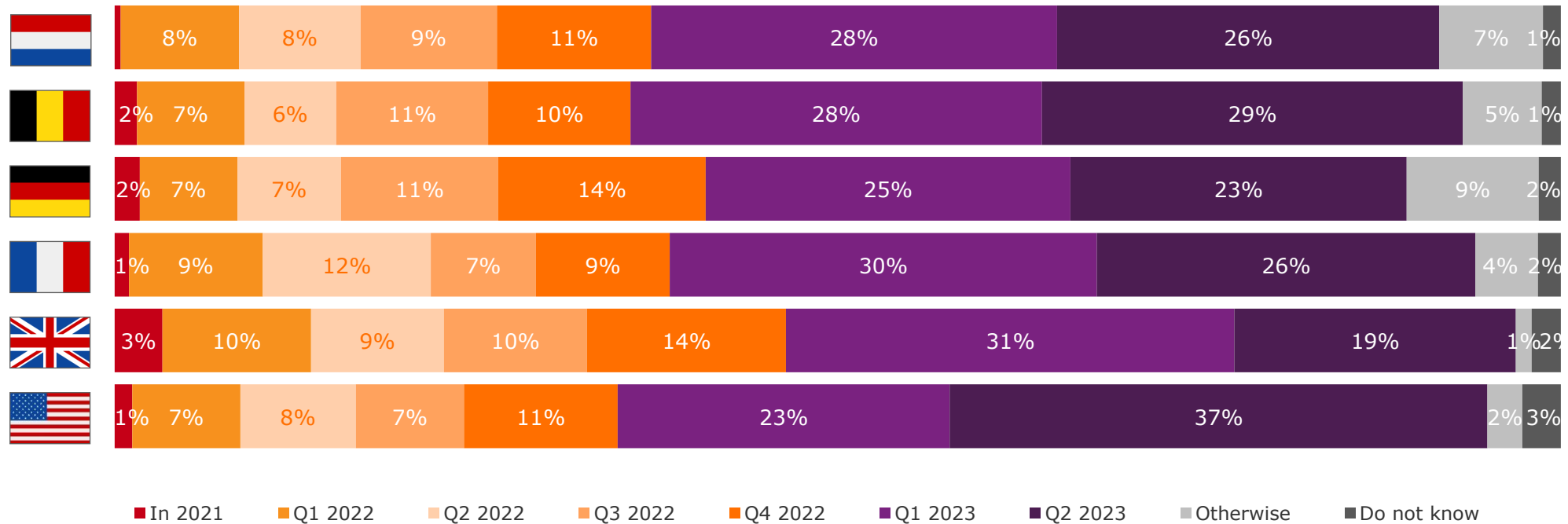
						
January	0%	1%	1%	0%	1%	1%
February	1%	1%	1%	0%	1%	2%
March	1%	1%	0%	1%	1%	2%
April	1%	1%	0%	1%	1%	2%
May	1%	1%	1%	1%	2%	1%
June	23%	20%	22%	16%	25%	27%
July	34%	42%	30%	41%	28%	30%
August	22%	17%	25%	27%	18%	10%
September	12%	10%	14%	9%	18%	10%
October	4%	4%	4%	2%	5%	7%
November	1%	1%	1%	1%	2%	3%
December	0%	1%	1%	1%	1%	4%
Total	100%	100%	100%	100%	100%	100%

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

Q: In which month will you leave for your next holiday (in the next 12 months)?



On average, 54% of those who have already booked holidays, booked in the first half of 2023 (Q1+Q2). In the United States, the group that booked in the April/May/June 2023 period is the largest (37%) and in the UK, that group is the smallest (19%).



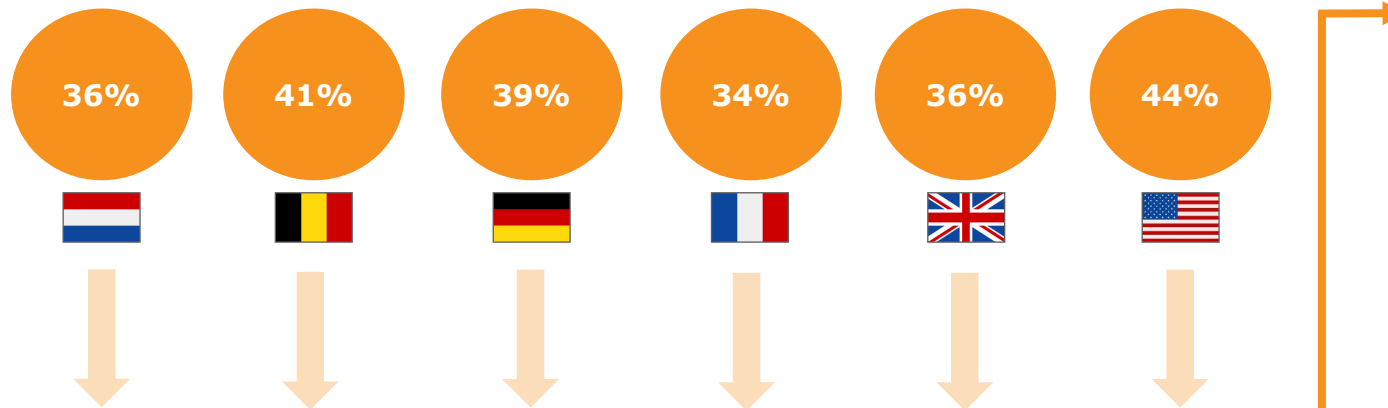
Base: People who have already booked a holiday

Q: When did you book your next holiday?

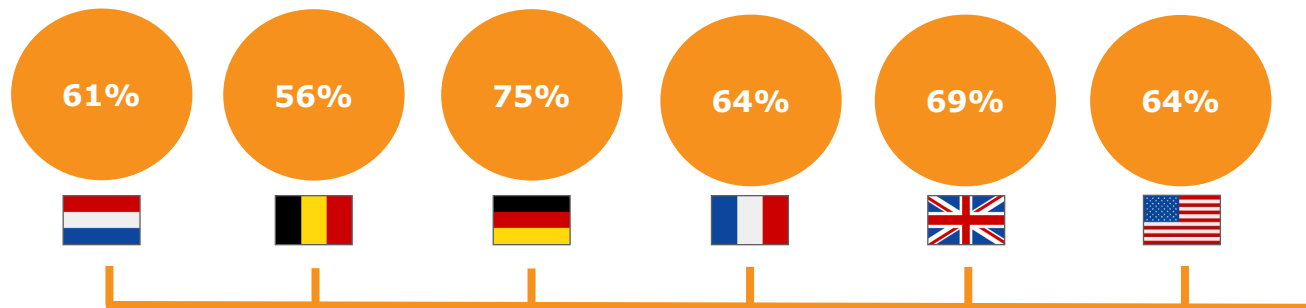
On average, 38% say they have a holiday intention for the next 12 months, but have yet to book. Of this group that has yet to book, an average of 65% are planning for a holiday. In this respect, the month of August is currently the most looked at. In places two and three are September and July.



Holiday intention but have yet to book



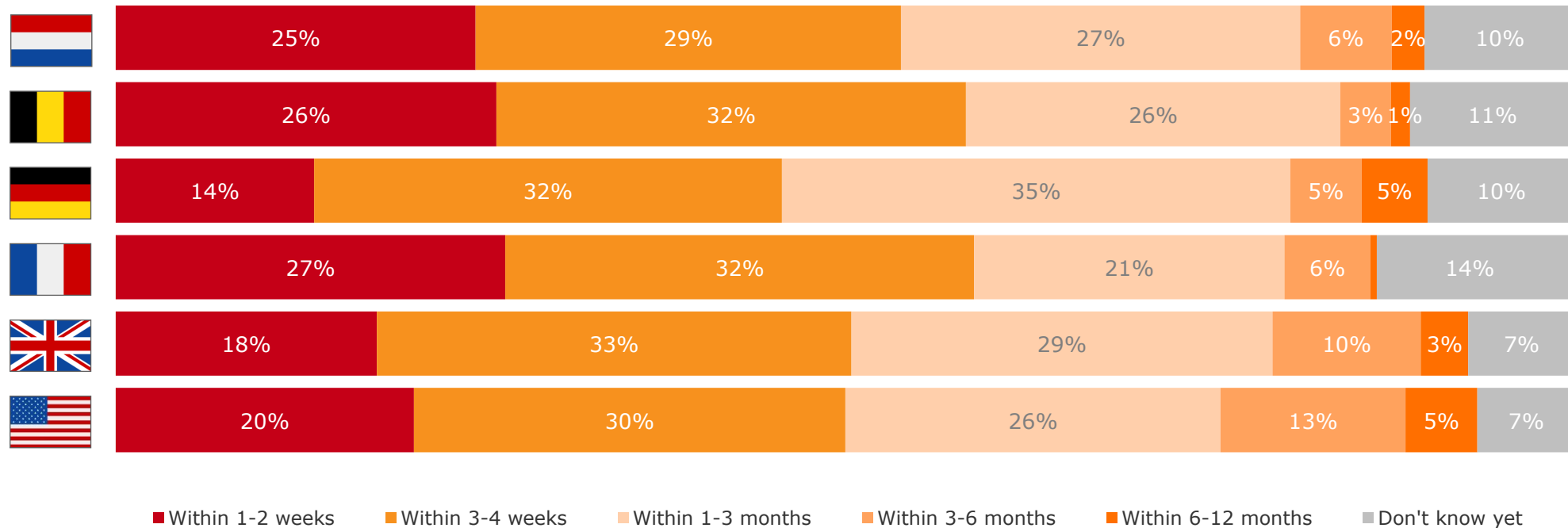
Planning for holidays



Month of departure:						
January	1%	0%	1%	0%	2%	1%
February	1%	0%	1%	0%	0%	2%
March	1%	0%	0%	0%	0%	2%
April	1%	3%	1%	1%	0%	1%
May	2%	1%	1%	0%	2%	2%
June	6%	11%	7%	9%	5%	5%
July	22%	27%	16%	24%	16%	26%
August	32%	17%	28%	38%	30%	23%
September	23%	29%	31%	21%	27%	15%
October	7%	9%	9%	3%	10%	10%
November	2%	2%	3%	0%	5%	7%
December	2%	1%	2%	3%	2%	5%
Number	N=223	N=230	N=287	N=221	N=246	N=284



Among those who are planning for a holiday in the next 12 months, the largest group plans to book it within 3 to 4 weeks (31% on average). In addition, on average 28% say they plan to book within 1 to 3 months and 21% within 1 to 2 weeks.









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

Question: When do you plan to book this holiday?



On average, 65% of the people who have not yet booked, but do have the intention of going on holiday, are already planning their upcoming holiday. If people do have a holiday intention but are not yet planning, it is mainly because they have not yet had time to do so (average 20%) or their financial situation does not allow it (average 10%).

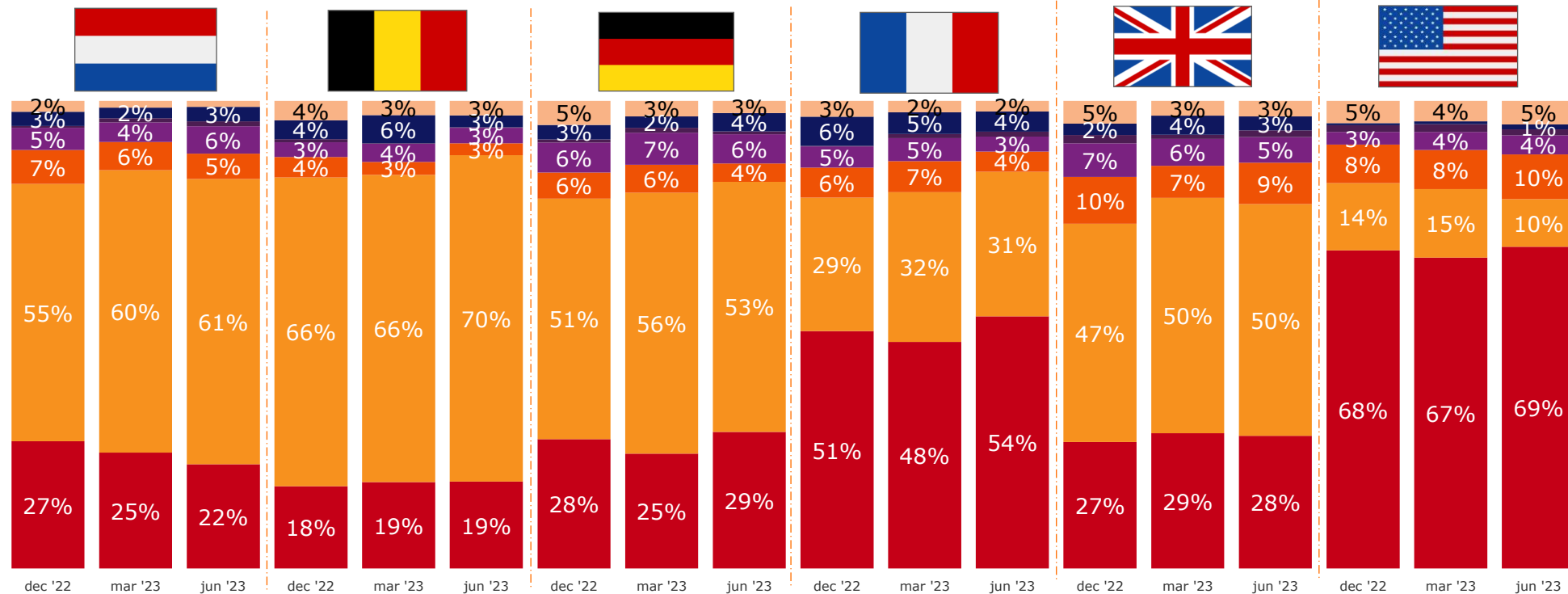
						
Yes	61%	56%	75%	64%	69%	64%
No, I haven't had time to look yet	25%	27%	11%	18%	17%	19%
No, my financial situation does not allow it (e.g. due to inflation and rising prices)	7%	10%	9%	11%	9%	11%
No, because of uncertainties surrounding the war in Ukraine	3%	3%	4%	2%	2%	2%
No, due to uncertainties surrounding coronavirus development	1%	2%	1%	1%	1%	2%
No, for another reason	2%	2%	1%	2%	2%	2%

Base: People who have not yet booked (but have holiday intentions for the next 12 months)

Q: Are you already looking for your next holiday?



For the summer holidays and the months thereafter, travelling elsewhere in Europe is leading over a holiday at home (among Dutch, Belgian, German and British). In June 2023, 22% of Dutch respondents with a holiday intention say they plan to spend the holiday at home. The French and Americans are significantly more likely to opt for a holiday at home.



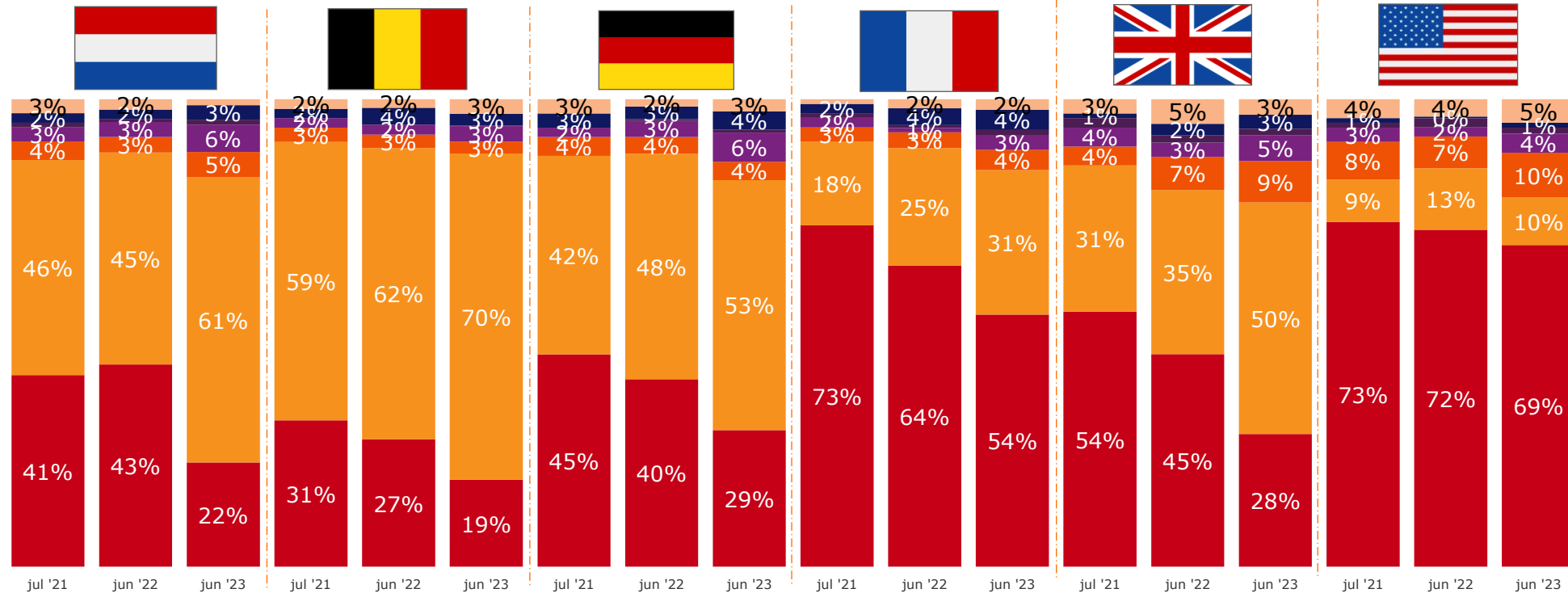
■ Own country ■ Europe ■ North/South America ■ Asia ■ Australia/Oceania ■ Africa ■ Don't know yet

Base: People with holiday plans in the next 12 months (booked or have yet to book)

Questionnaire: In which destination do you plan to spend your next holiday mainly?



In all countries except the United States, holiday plans at home fell sharply compared to summers in 2021 and 2022. This can be explained by the fact that holidays at home rose sharply during the Coronavirus pandemic, when strict travel restrictions were in place.



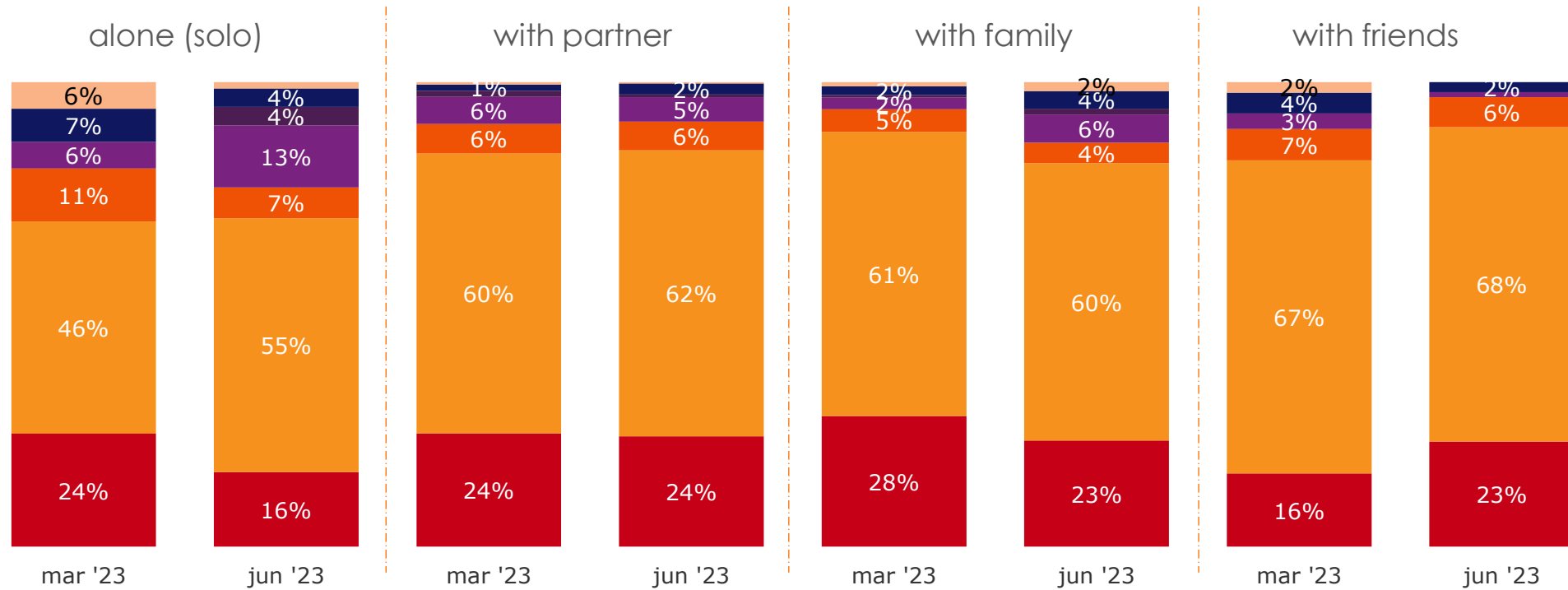
■ Own country ■ Europe ■ North/South America ■ Asia ■ Australia/Oceania ■ Africa ■ Don't know yet

Base July '21 and June '22: People with holiday plans (booked/voucher/are yet to book) in the rest of the calendar year
 Base June '23: People with holiday plans in the next 12 months (booked or have yet to book)

Q: In which destination do you plan to spend your next holiday mainly?



Dutch people going on holiday/travel alone, indicated higher levels of holiday plans for Europe or Asia in June '23 than in March '23. Among Dutch couples, the choice of continent has hardly changed compared to March '23. Those travelling with immediate family/other relatives made somewhat more plans for Asia and Africa. When travelling with friends, on the contrary, people made more plans for holidays in their own country.



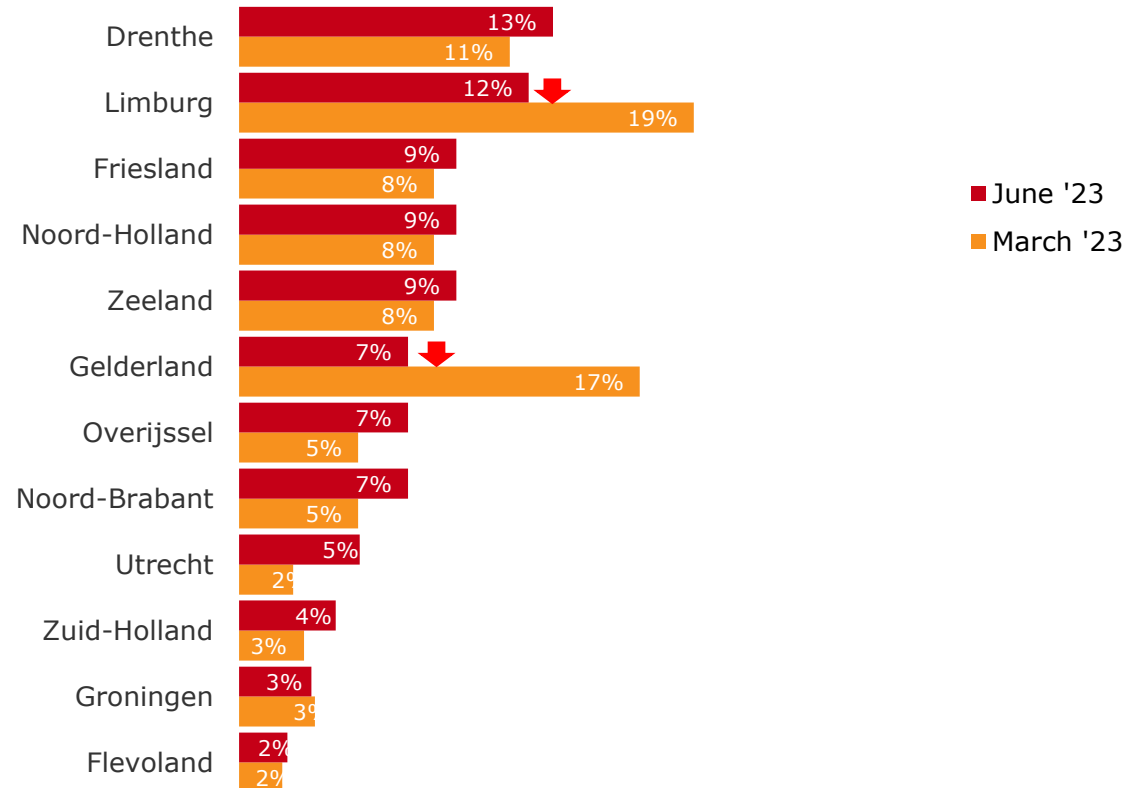
■ Own country ■ Europe ■ North/South America ■ Asia ■ Australia/Oceania ■ Africa ■ Don't know yet

Base: Dutch people with holiday plans in the next 12 months (booked or have 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 mainly?



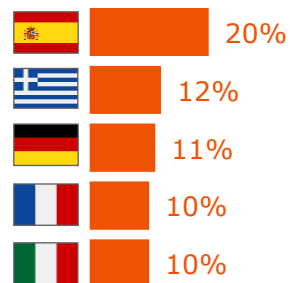
In June '23, Dutch people wishing to spend their next holiday in the Netherlands said they would most often do so in Drenthe or Limburg (13% and 12% respectively). In third (shared) place are Friesland, Noord-Holland and Zeeland (all at 9%). Compared to March '23, plans for a holiday in Limburg and Gelderland have decreased.



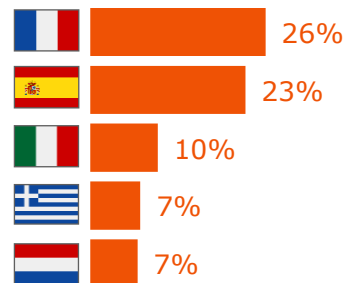
Base: Dutch people with holiday plans in the Netherlands (booked or yet to book)
Arrow: significant difference compared to previous measurement

Question: In which province do you plan to spend your next holiday (in the Netherlands) mainly?

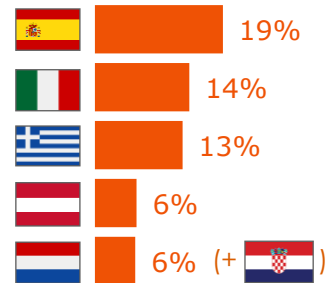
NL



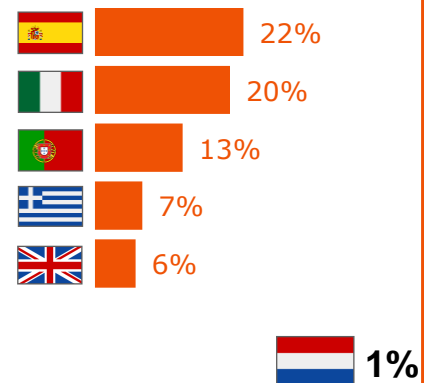
BE



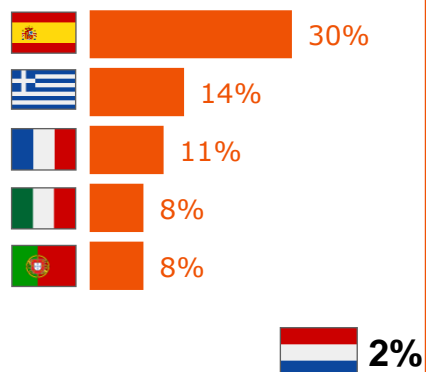
DE



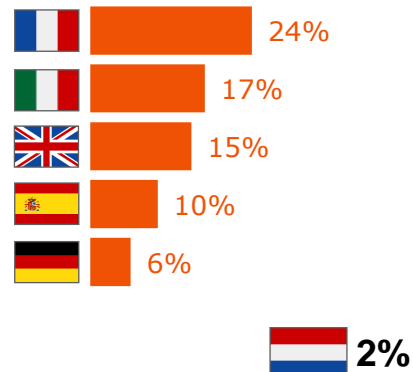
FR



UK



US



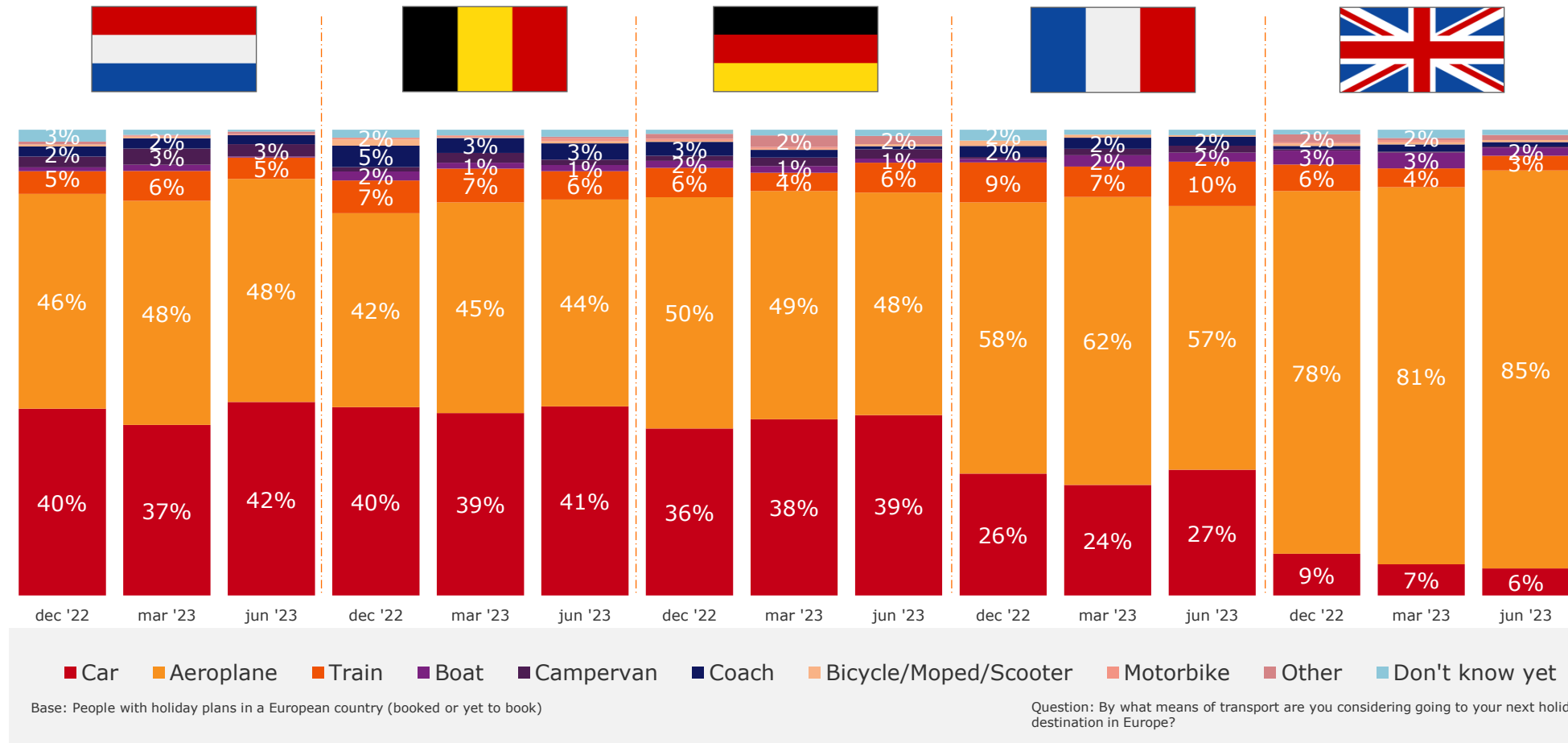
- Spain is the most popular European holiday destination. In all six countries, Spain returns in the top five and in four of them, in first place. Spain has long been a favourite among the Dutch, Germans, French and British.
- Among Belgians, France is the most popular European holiday country. The Netherlands currently ranks fifth among Belgians.
- Among Germans, the Netherlands is also in the top five for a European holiday in the next 12 months. This is a shared fifth spot with Croatia.
- Like Spain, Italy appears in the top five of all these six countries.
- Greece is also popular. Only among Americans is this country (just) missing from the top 5.

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?

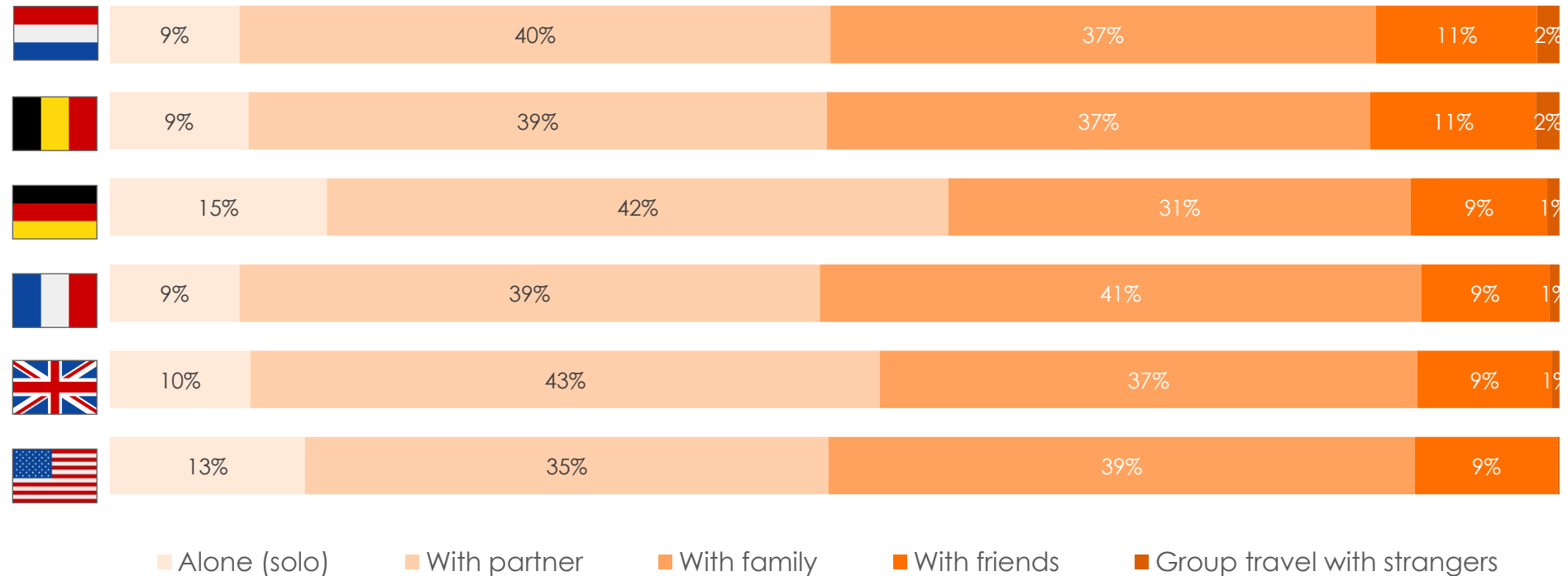


In all five countries, the plane is the most frequently chosen means of transport for the next holiday in Europe (average 55%). Among the Dutch, Belgians and Germans, the car also scores relatively high. Furthermore, the French consider going by train in higher numbers than the other countries.





On average, the largest group goes on holiday with their partner (40%), followed by a holiday with immediate family/other relatives (37% on average). Furthermore, on average 11% have plans for a solo trip and 10% for a holiday/trip with one or more friends. Compared to the other countries, the Dutch and Belgians go on group trips with strangers the most (both 2%).









Base: People with holiday plans for the next 12 months (booked or yet to book)

Q: Who are you planning to travel with on your next holiday?



A hotel/guesthouse is the most popular type of accommodation (46% on average). This is followed by an apartment (12% on average) and in third place is renting accommodation from a private person (9% on average). Renting from private individuals is most popular among the French. A bungalow (park) and camping score relatively high among the Dutch.

						
Hotel/guesthouse	41%	48%	51%	28%	49%	59%
Bed and breakfast	5%	6%	3%	8%	7%	4%
Apartment	13%	13%	23%	12%	11%	2%
Bungalow (park)	13%	5%	2%	7%	2%	0%
Campsite	10%	6%	4%	10%	3%	3%
Group accommodation	1%	1%	1%	1%	1%	1%
With a private individual (e.g. Airbnb)	6%	6%	4%	16%	12%	10%
Boat	1%	1%	1%	1%	1%	4%
Second home	1%	2%	0%	2%	2%	1%
Residence family/friends/relatives	5%	7%	6%	11%	6%	9%
House exchange	0%	0%	0%	0%	0%	0%
Otherwise	2%	1%	2%	1%	3%	2%

Base: People with holiday plans for next 12 months (booked or yet to book)
Highlighted: 3 highest scores per country

Q: What type of accommodation are you planning to stay in during your next holiday?



Beach holidays are the most frequently planned (average 26%). This is followed by holidays with friends/family (14%) and nature holidays (11%). Only among the Dutch is a tour in the top 5. Among Americans, the cruise scores relatively high compared to the other countries.







Winter sports holiday	1%	0%	0%	0%	0%	0%
Beach holiday	23%	27%	33%	27%	30%	19%
Water sports holiday	0%	1%	1%	1%	1%	1%
Walking holiday	4%	7%	7%	2%	2%	2%
Cycling holiday	2%	2%	1%	1%	0%	0%
Other type of active holiday	2%	2%	2%	1%	3%	2%
Tour	9%	4%	5%	2%	4%	3%
Cruise	2%	1%	2%	2%	3%	8%
Visiting event	2%	2%	2%	2%	2%	4%
City break	7%	7%	10%	7%	10%	8%
Cultural holidays	6%	8%	4%	8%	6%	4%
Visiting friends/family/etc	5%	7%	8%	9%	9%	16%
Nature holiday	11%	11%	14%	19%	6%	7%
Wellness holidays	2%	1%	4%	1%	2%	3%
Holidays with friends/family/etc	17%	15%	2%	13%	19%	16%
Culinary holidays	1%	1%	2%	2%	0%	1%
Shopping holiday (shopping)	1%	1%	1%	0%	1%	1%
Volunteer	1%	0%	0%	0%	0%	0%
Otherwise	5%	2%	2%	1%	3%	4%

Base: People with holiday plans for next 12 months (booked or yet to book)
 Highlighted: 5 highest scores per country

Q: How would you characterise your next holiday?



On average, flexible cancellation conditions are most important when choosing a holiday destination (on average 70% consider this (very) important). This is followed by 'staying in a quiet place' (average 69%) and rising prices (average 64%). Staying in a quiet place is considered most important by the French (81%) and significantly less by the British (57%).

						
Flexible cancellation conditions	66%	66%	73%	74%	70%	72%
Destination close to home	29%	35%	38%	36%	26%	29%
Development of Corona at the destination	36%	40%	40%	43%	46%	48%
Stay in quiet place	68%	75%	71%	81%	57%	61%
Development of the war in Ukraine	36%	37%	40%	38%	35%	30%
Rising prices (fuel, energy, inflation)	57%	65%	64%	74%	59%	68%
Crowds at airports	43%	37%	43%	40%	46%	44%
Sustainability (minimising environmental impact)	44%	51%	54%	56%	44%	43%

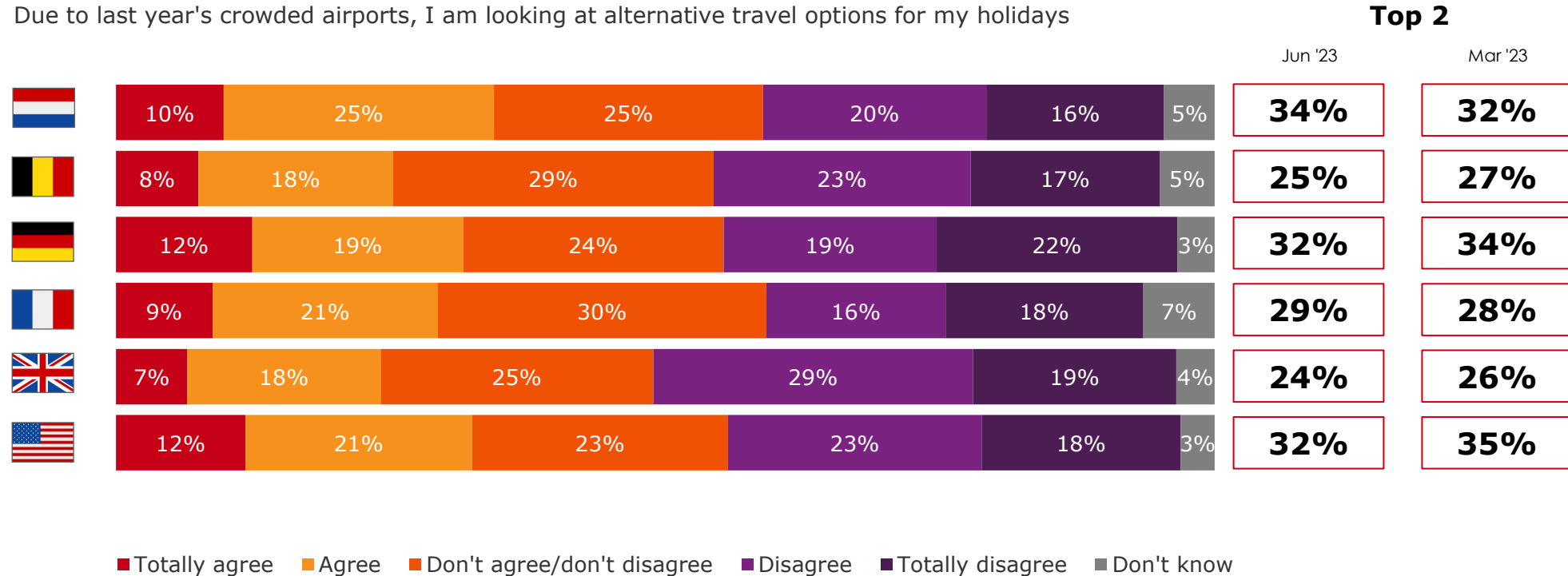
Base: People with holiday plans for next 12 months (booked or yet to book)
 Percentage: top 2 (very important + important)
 Highlighted: the three highest scores from each country are in bold

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



On average, 30% are looking at alternative travel options for their holidays because of last year's crowded airports. This was also 30% in March 2023 and 42% in September 2022. So, compared to nine months ago, people are looking less at alternative travel options for their holidays because of crowded airports.

Due to last year's crowded airports, I am looking at alternative travel options for my holidays

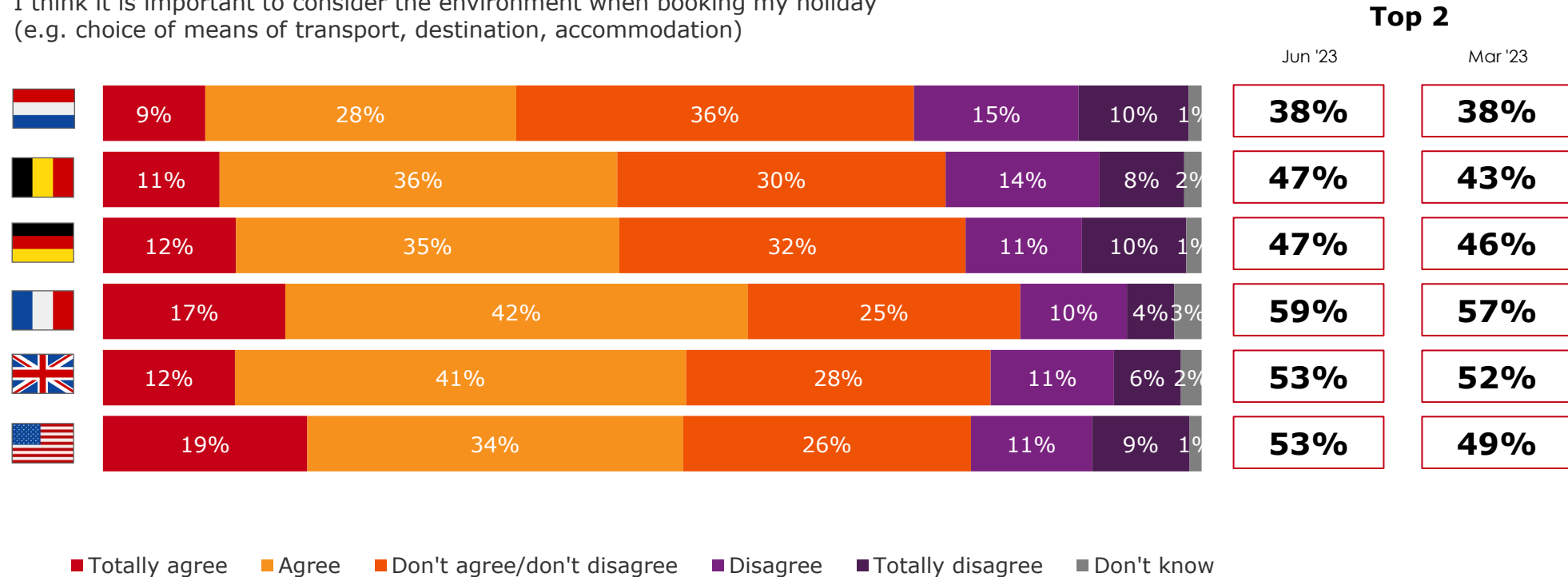


Base: everyone (entire sample)
Rounding differences may occur at the top 2%.



About half (49%) of those surveyed (fully) agree with the statement 'I think it is important to consider the environment when booking my holiday'. This is almost the same as the average from March 2023 (48%) and December 2022 (49%). Of the six countries below, Dutch people agree least with this statement.

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

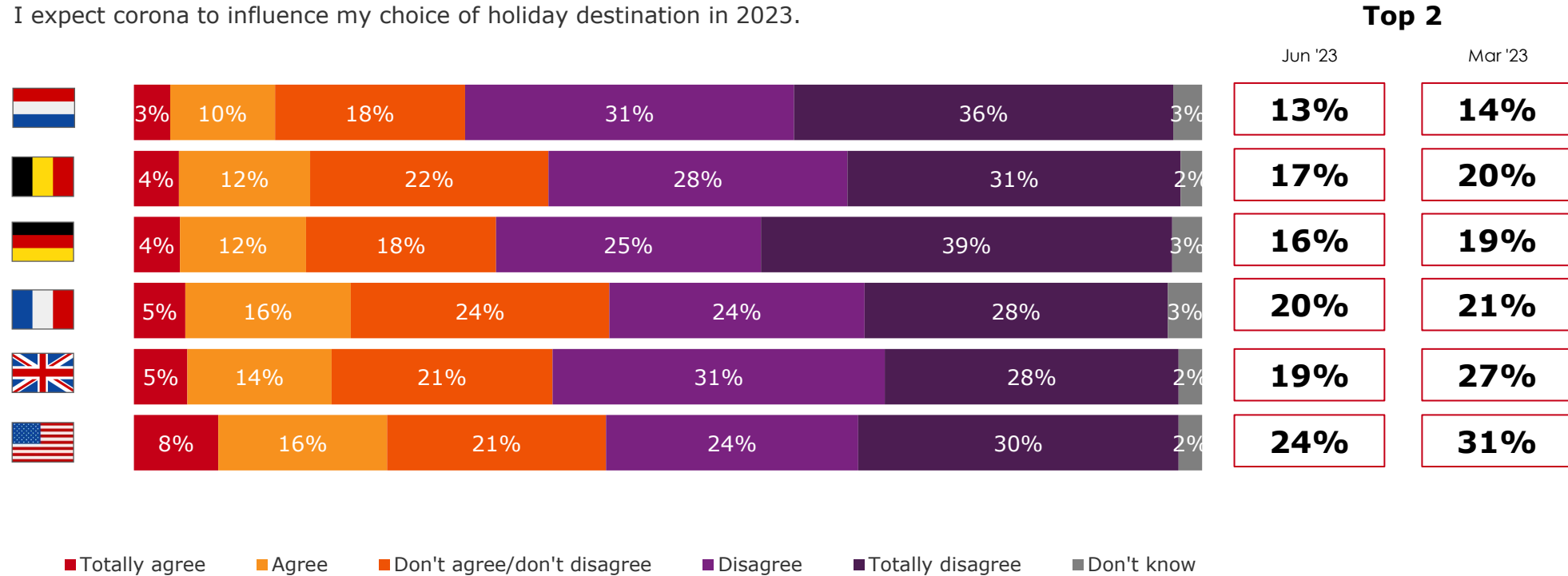


Base: everyone (entire sample)
Rounding differences may occur at the top 2%.



On average, 18% expect corona to influence their choice of holiday destination in 2023. A year ago, in June 2022, this was 39%. So the impact of corona on the choice of a holiday destination has decreased significantly. It is lowest in the Netherlands (13%) and highest in the United States (24%).

I expect corona to influence my choice of holiday destination in 2023.

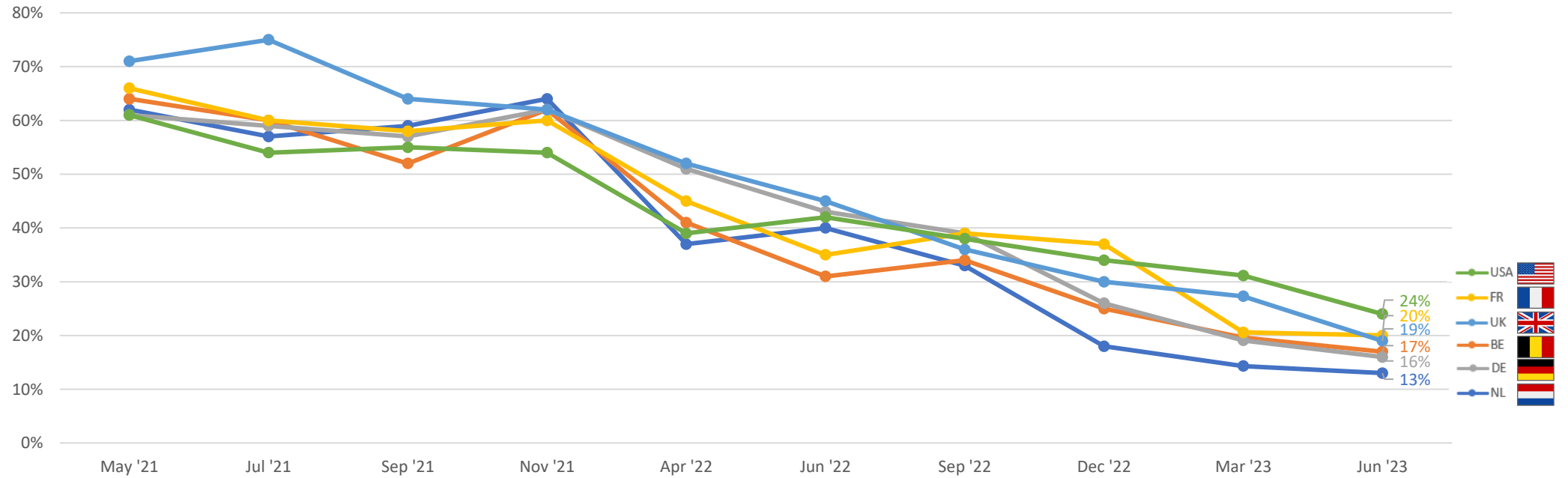


Base: everyone (entire sample)
 Rounding differences may occur at the top 2%.

The expectation that corona will influence upcoming holiday destination choice shows a downward trend in all six countries.



I expect corona to influence my choice of holiday destination.



Base: everyone (entire sample)
 Percentage: top 2 score ((totally) agree)

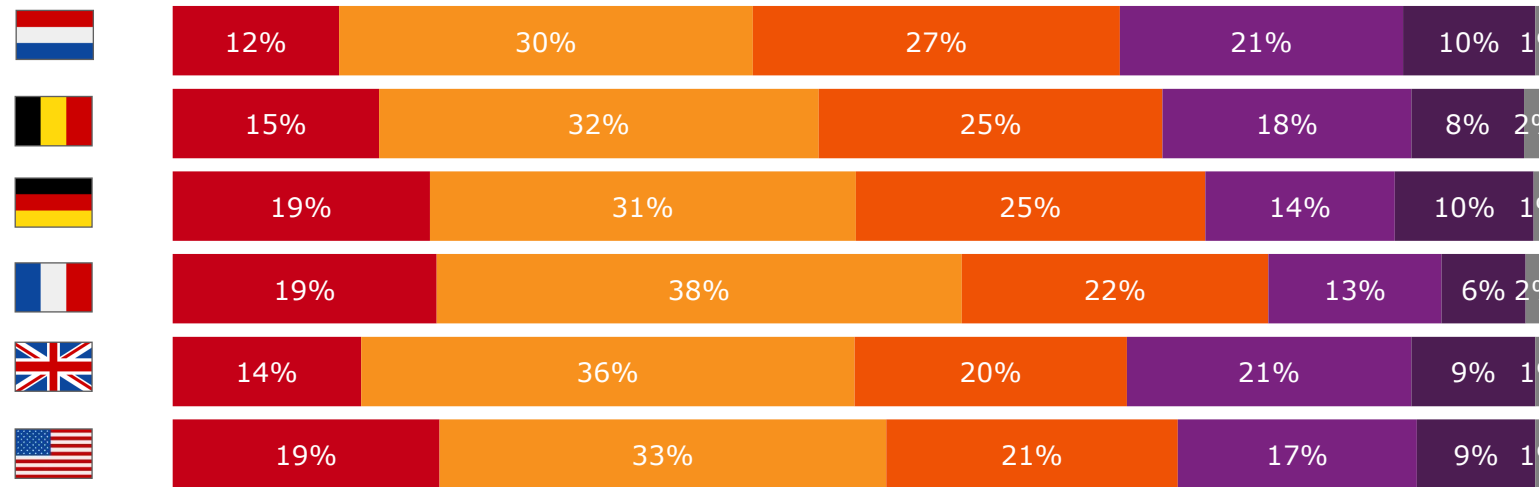


2. Impact of rising prices on travel behaviour



Half of individuals (average 50%) say they are forced to adjust holiday behaviour due to rising prices. In March 2023, this was 49% and in December 2022 53%. The French are still in highest agreement with this statement (57%) and the Dutch the least (42%).

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



Top 2

Jun '23

Mar '23







42%	38%
47%	49%
50%	53%
57%	56%
50%	50%
52%	50%

■ Totally agree
 ■ Agree
 ■ Don't agree/don't disagree
 ■ Disagree
 ■ Totally disagree
 ■ Don't know

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



In June 2023, people say that if they change their holiday behaviour (due to higher prices), they do so mainly by choosing cheaper accommodation/lodging (44% on average) or by going on holiday less often (43% on average). The least chosen options are saving on transport (average 20%) and avoiding the high season (average 22%).

						
Shorter holidays	29%	32%	26%	31%	27%	33%
Less frequent holidays	36%	44%	49%	38%	49%	43%
Cheaper accommodation/lodging	41%	42%	48%	38%	47%	47%
Cheaper transport	21%	19%	18%	21%	19%	25%
Save at destination itself	34%	28%	32%	39%	30%	36%
Avoiding the high season	23%	21%	19%	21%	24%	25%
Other, namely	5%	3%	3%	1%	2%	1%

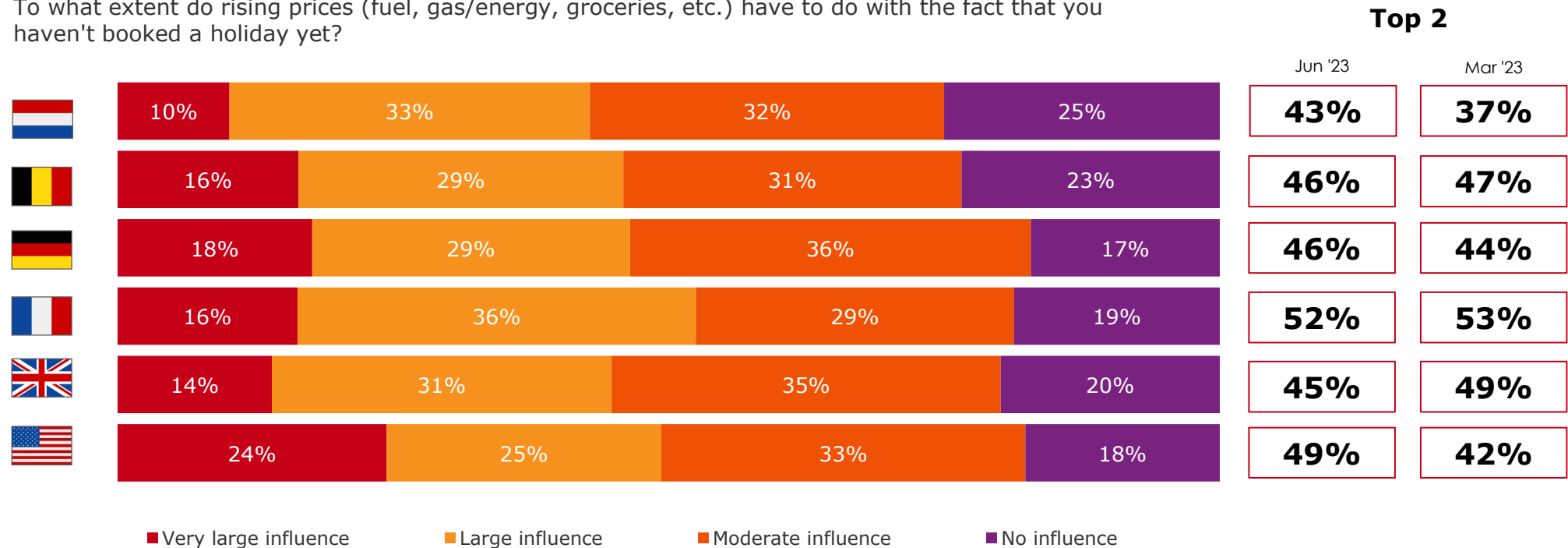
Base: People who (totally) agree with the statement 'Rising prices (fuel, gas/energy, groceries, etc.) are forcing me to adjust my holiday behaviour'
 Highlighted: the three highest scores from each country are in bold

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



Of those who have holiday intentions but have not yet booked, an average of 47% say that rising prices have a (very) big influence on this. In March 2023 and December 2022, this was similar (45%). The top2 scores range from 43% among the Dutch to 52% among the French in June 2023.

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



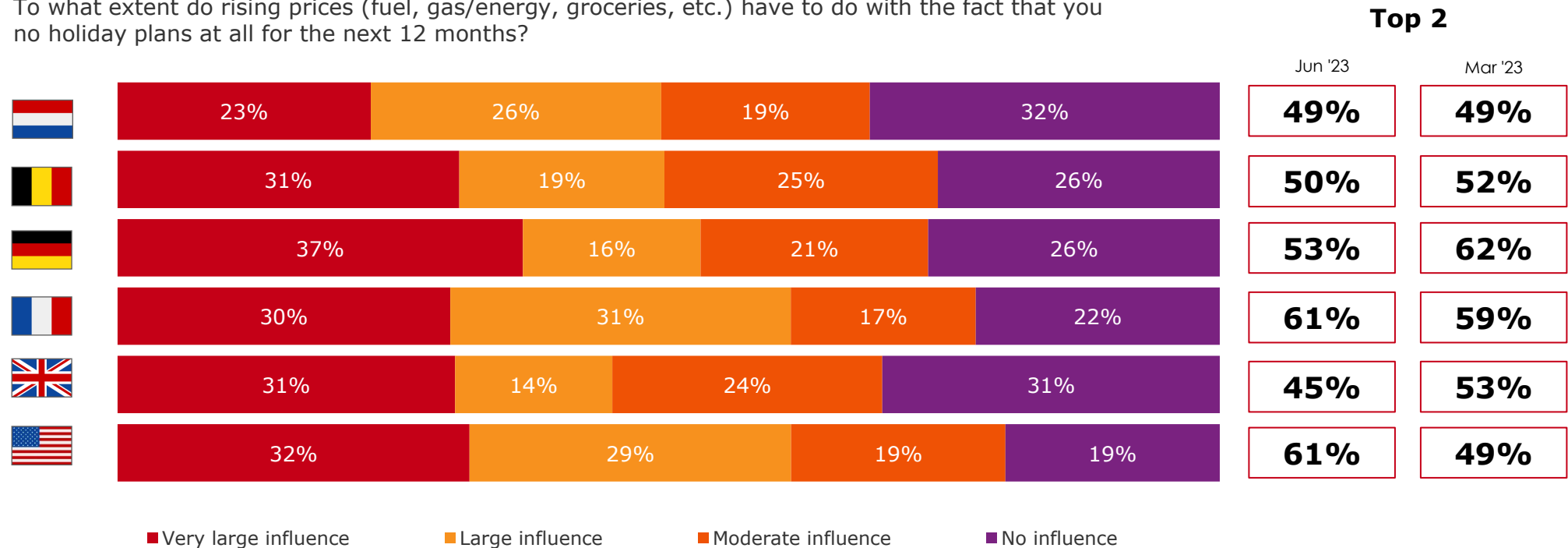
Base: People who have not yet booked but have holiday intentions for the next 12 months
Rounding differences may occur at the top 2%.

Question: 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?



On average, 54% of people without holiday plans say that rising prices play a (very) big role in this. This is similar to the percentages over the past six months (54%-55%). Among the French and Americans, rising prices now have the biggest influence on postponing holiday plans.

To what extent do rising prices (fuel, gas/energy, groceries, etc.) have to do with the fact that you no holiday plans at all for the next 12 months?



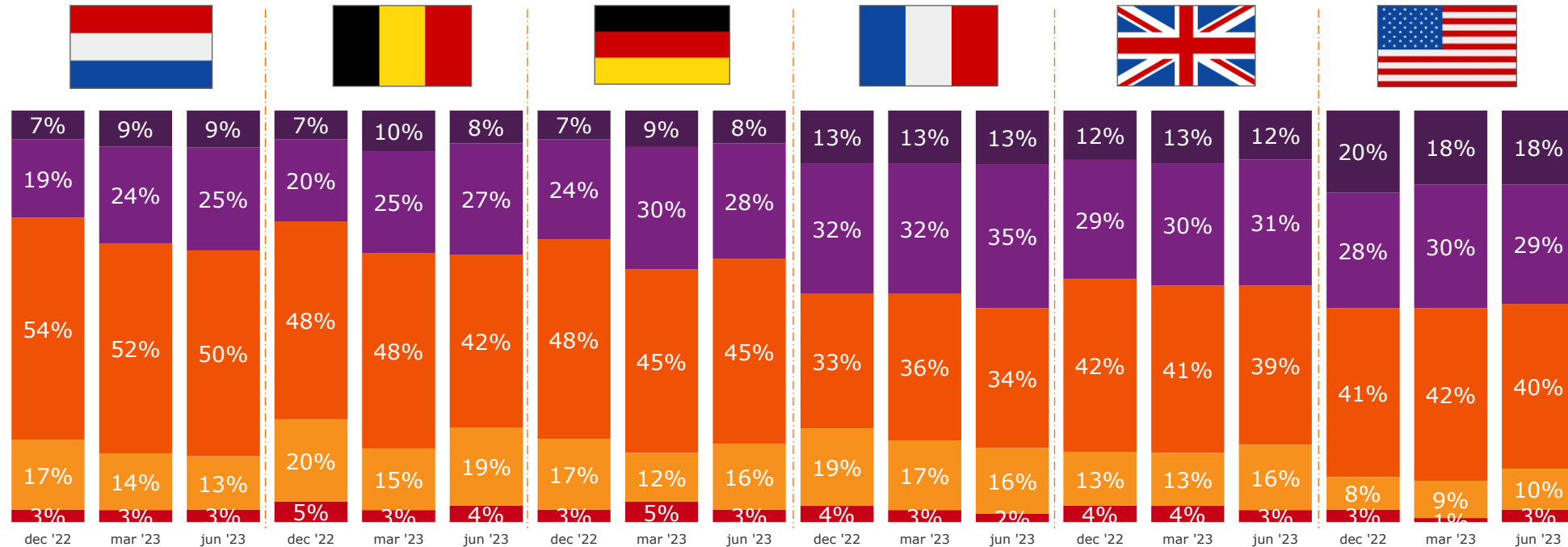
Base: People who currently have no holiday intention for the next 12 months
Rounding differences may occur at the top 2%.

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 the next 12 months?



Of those with holiday plans, an average of 42% say they have a similar holiday budget for the next holiday as in previous years. This percentage was 44% in March 2023 and 45% in December 2022. Furthermore, an average of 29% actually say they will have a slightly higher budget (in March 2023 this was 28%).

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



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

Base: People with holiday plans for the next 12 months (booked or yet to book) Q: Which situation is most applicable to you?

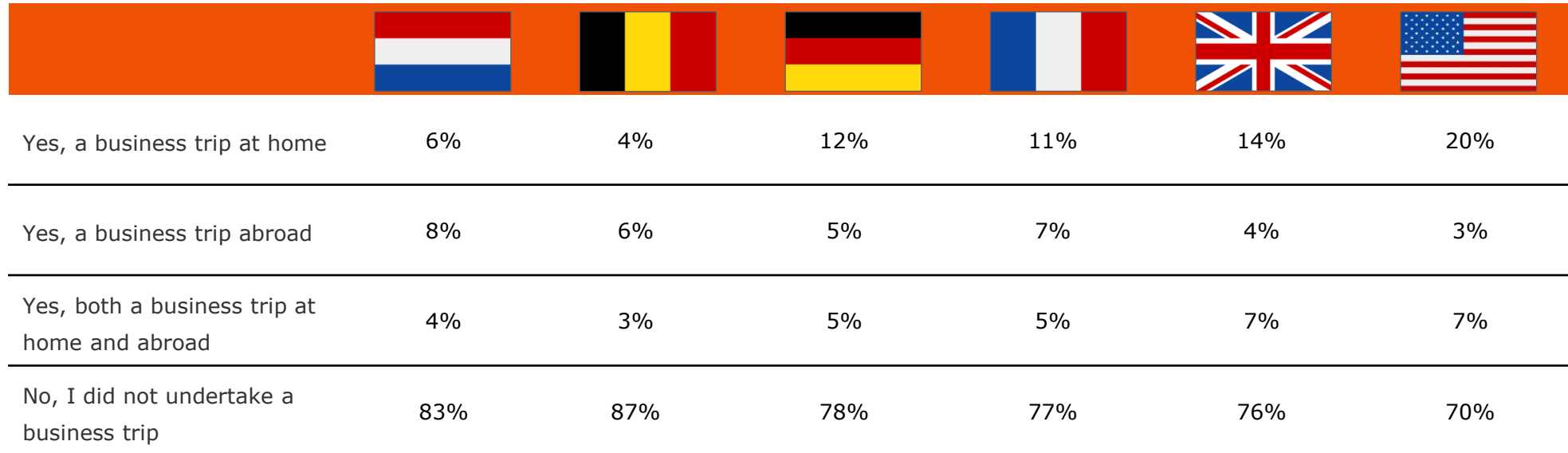


3. Business travel



Of the six countries listed below, Belgians and Dutch have undertaken the least business trips (including overnight stays) in the past 12 months. Among Americans, the share that has undertaken a business trip is the highest (30%) of all the countries and mainly involves business trips in their own country.

In the past 12 months, have you undertaken a business trip (including overnight stay) for work either at home or abroad?









Base: everyone (entire sample)

For the next 12 months, an average of 23% plan to undertake a business trip (incl. overnight stay) at home or abroad. Among Belgians and Dutch, this percentage is significantly lower (13% and 19% respectively) than among Americans (32%).



In the next 12 months, do you plan to undertake a business trip (including overnight stay) for work either at home or abroad?

						
Yes, one business trip at home	5%	3%	9%	9%	9%	14%
Yes, several business trips at home	4%	3%	6%	6%	8%	11%
Yes, one business trip abroad	6%	4%	4%	6%	5%	2%
Yes, several business trips abroad	2%	2%	2%	2%	2%	2%
Yes, multiple business trips at home and abroad	2%	1%	2%	2%	2%	4%
No	81%	87%	77%	75%	75%	68%

Base: everyone (entire sample)



4. China



In China, corona measures were in place for much longer than in Europe, due to the '**zero covid policy**' in place at the time. However, since early 2023, Chinese people have been allowed to travel again. **This edition** of the Holiday Sentiment Monitor (June) brings you up-to-date insights from this recently 'opened' market.

Due to new **legislation*** in China, data collection in China could not take place in the same way as for the other six countries in this study. Therefore, an alternative way was chosen, namely data collection via **WeChat**. This is China's most popular social media/messaging app and hence a valuable channel to reach people for this study.

However, this group is not representative of all of China, as data collection focused on the major cities in China. In addition, the respondents are mainly between 25-44 years of age and have an above-average interest in travelling to Europe and the Netherlands.

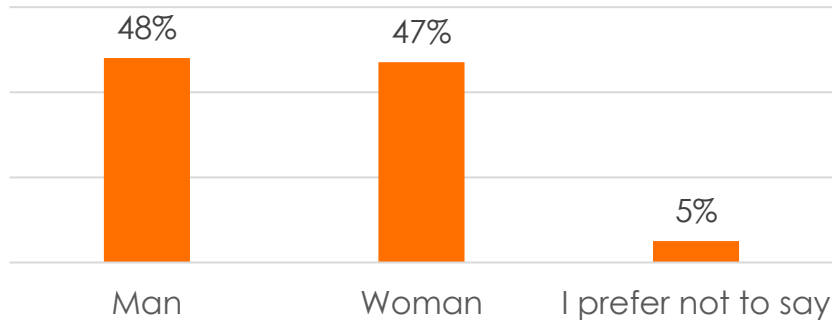
* Personal Information Protection Law (PIPL)



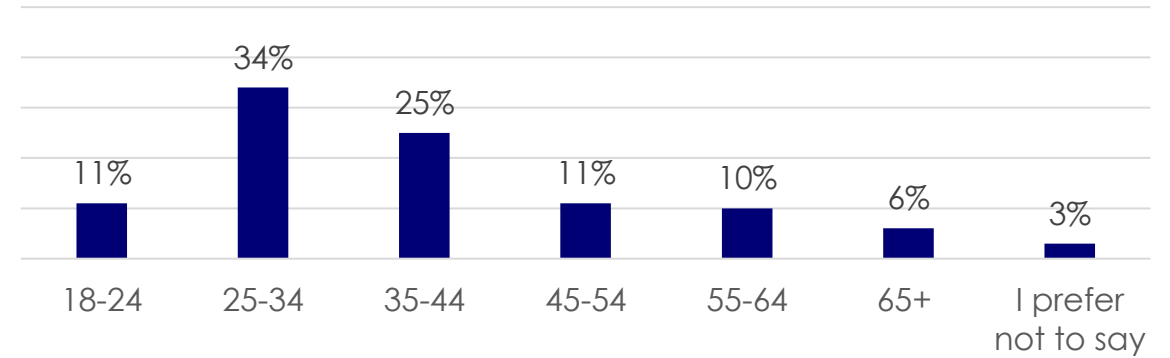
Profile

Total number of Chinese respondents: n=413 

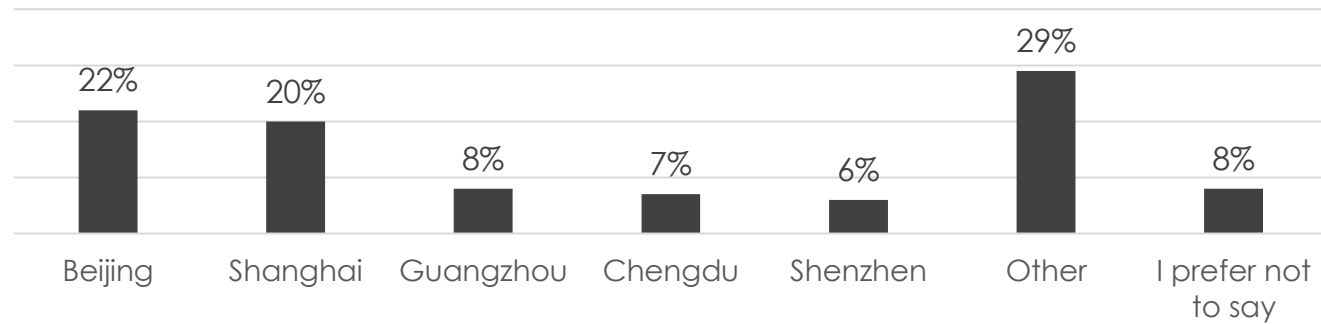
Gender



Age



Residence

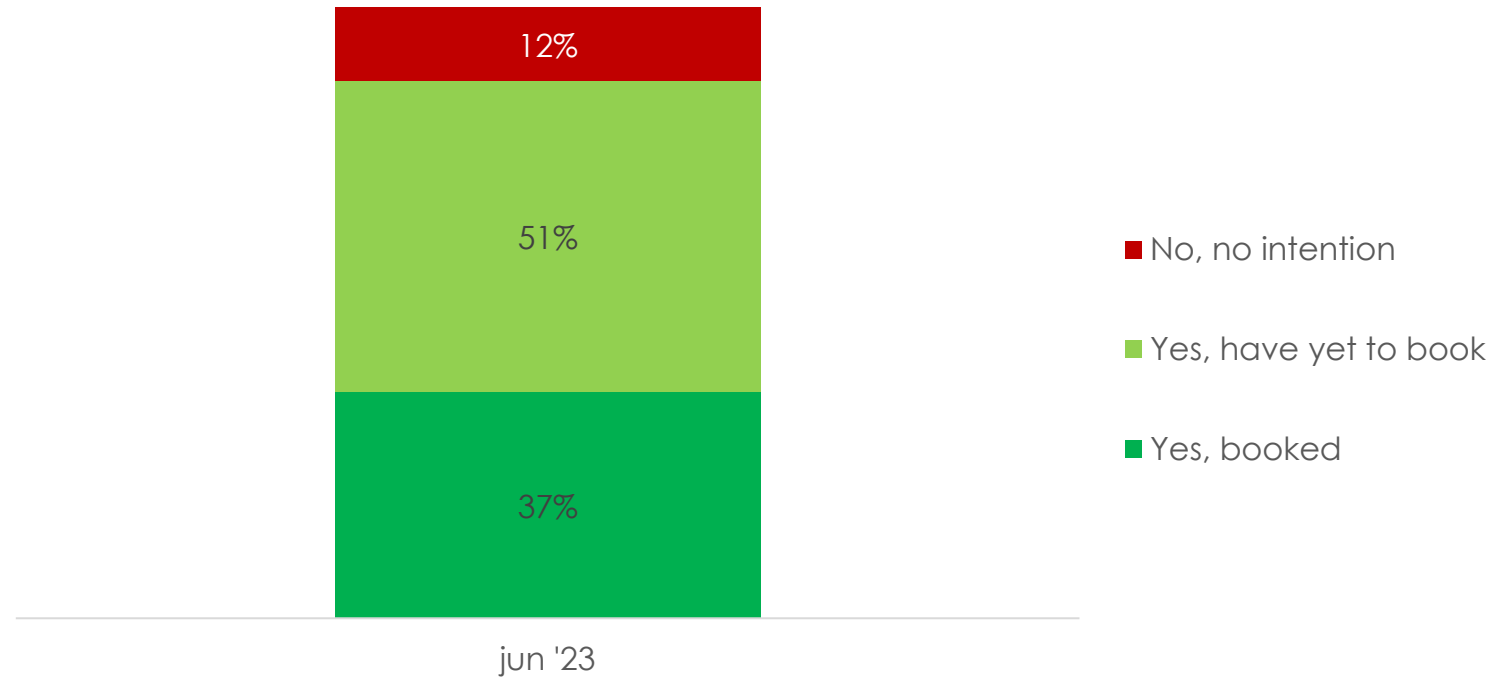




88% of Chinese respondents have a holiday intention for the next 12 months. 37% of the total have already booked a holiday and 51% have yet to book. 12% have no intention to go on holiday at all in the next 12 months.



N=413



Base: everyone (entire sample)

Q: Do you currently intend to go on holiday sometime in the next 12 months?

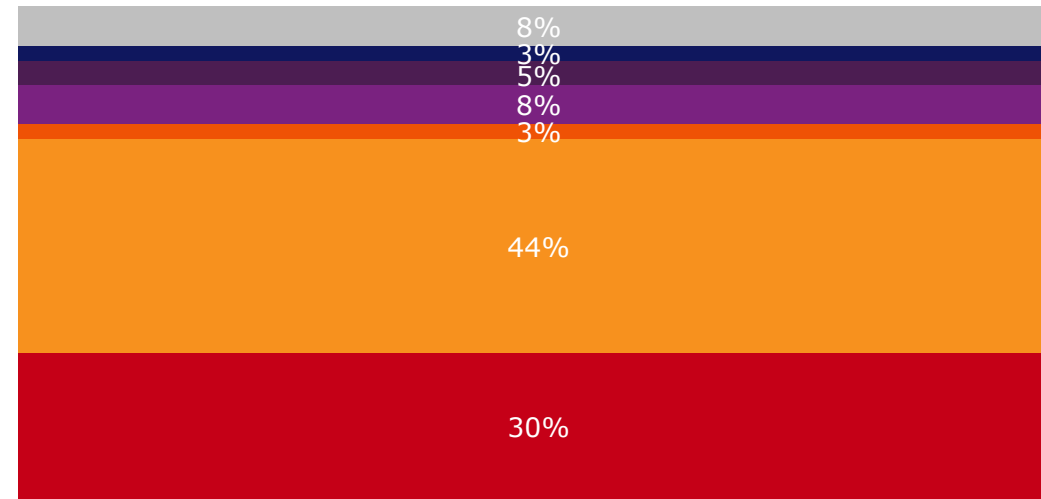


30% of Chinese respondents (with holiday plans) say they will stay in their home country for the next holiday. 44% plan to spend their next holiday in Europe.

(As described at the beginning of this chapter, this is not a representative sample for all of China and there is an above-average interest in travelling to Europe and the Netherlands within this group).



N=363



jun '23

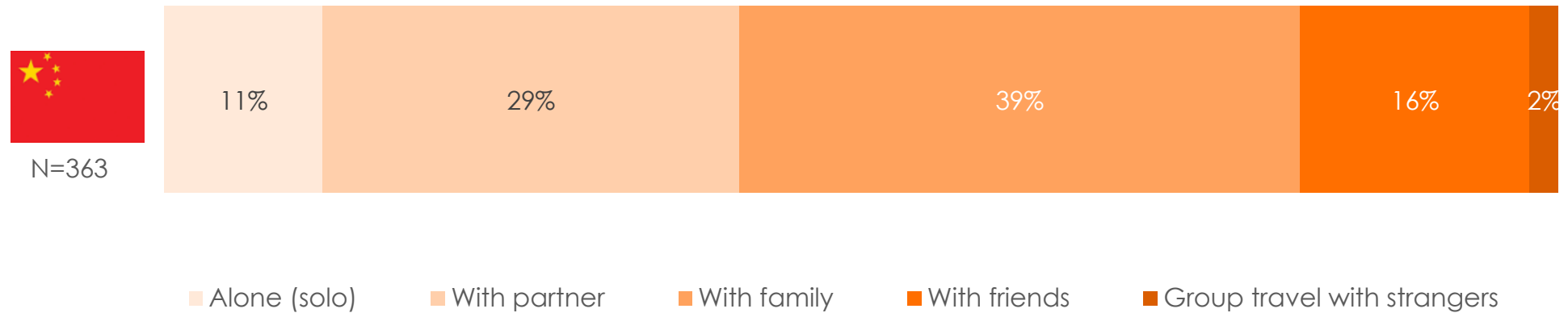
- Own country
- Europe
- North/South America
- South-East Asia
- North-East Asia
- Australia/Oceania
- Africa
- Don't know yet

Base: People with holiday plans in the next 12 months (booked or have yet to book)

Questionnaire: In which destination do you plan to spend your next holiday mainly?



The largest group of Chinese respondents go on holiday with their immediate family/other relatives (39%), followed by a holiday with partner (29%). Furthermore, 16% have plans for a holiday/tour with friends and 11% have plans for a solo trip.

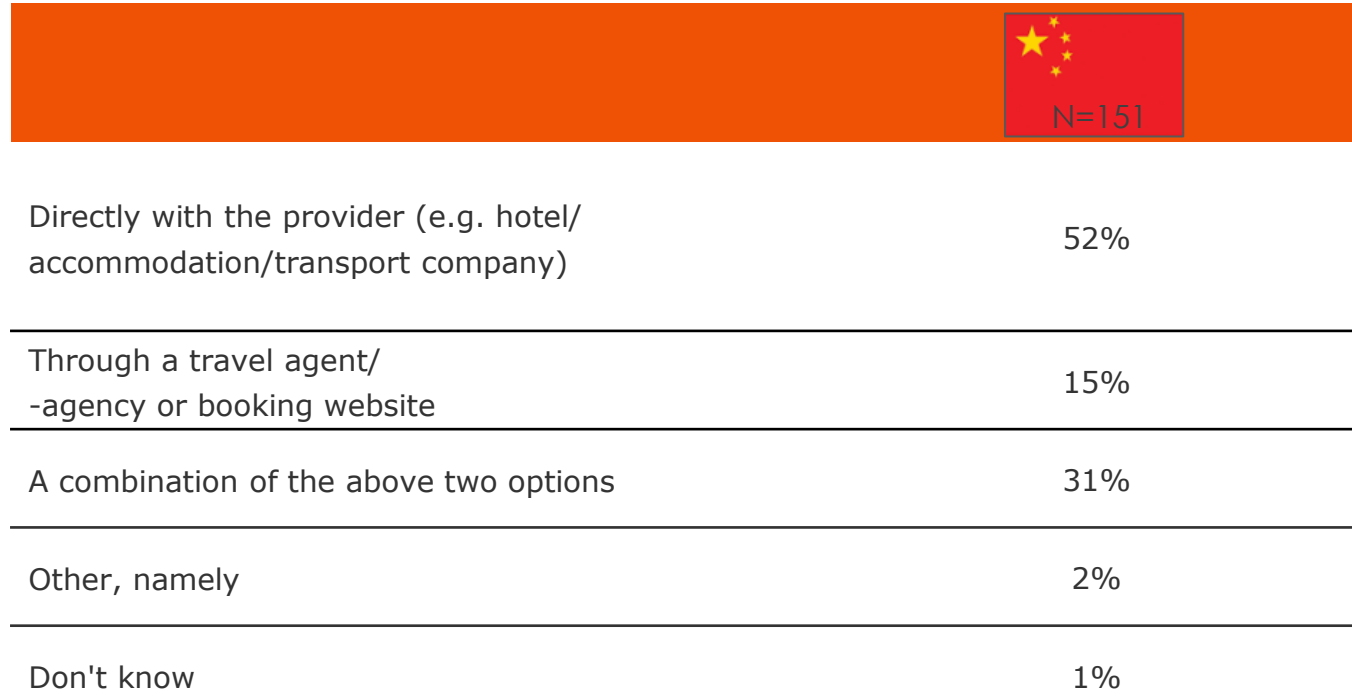


Base: People with holiday plans for the next 12 months (booked or yet to book)

Q: Who are you planning to travel with on your next holiday?



The majority of Chinese respondents who have already booked a holiday did so to a large extent directly with the provider (52%). In addition, the combination of booking directly with the provider and via a travel organisation/booking website is also common (31%).

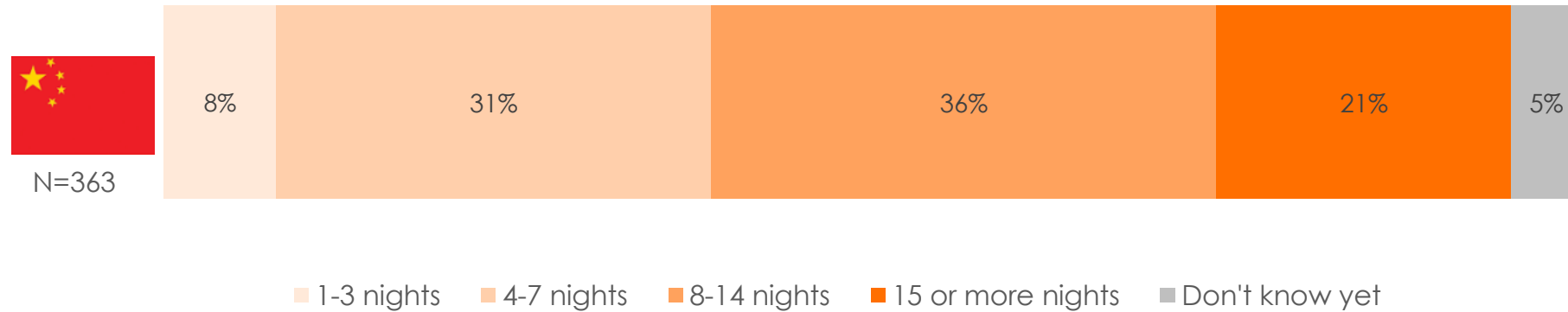


Base: People who have already booked a holiday in the next 12 months

Q: How is your next holiday booked?



The majority of Chinese respondents with holiday intentions plan to go away for 8-14 nights for their next holiday (36%). After that, the 4-7 nights category is the most chosen (31%).

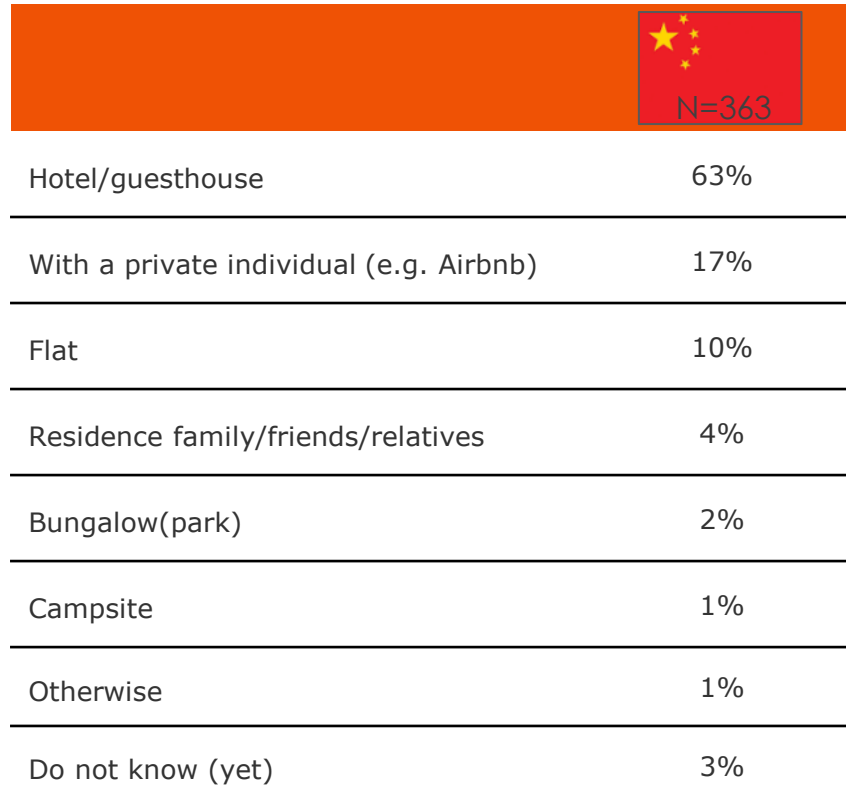


Base: People with holiday plans for the next 12 months (booked or yet to book)

Q: How long do you plan to be away on your next holiday (in the next 12 months)?



A hotel/guesthouse is the most frequently chosen type of accommodation by Chinese respondents (63%). This is followed by renting accommodation from a private person (17%).



Base: People with holiday plans for next 12 months (booked or yet to book)

Q: What type of accommodation are you planning to stay in during your next holiday?



Among Chinese respondents who have already booked a holiday, the next holiday is mostly in July (28%), June (19%) and October (17%). July is the school holiday in China and October is the national 'Golden Week' holiday.

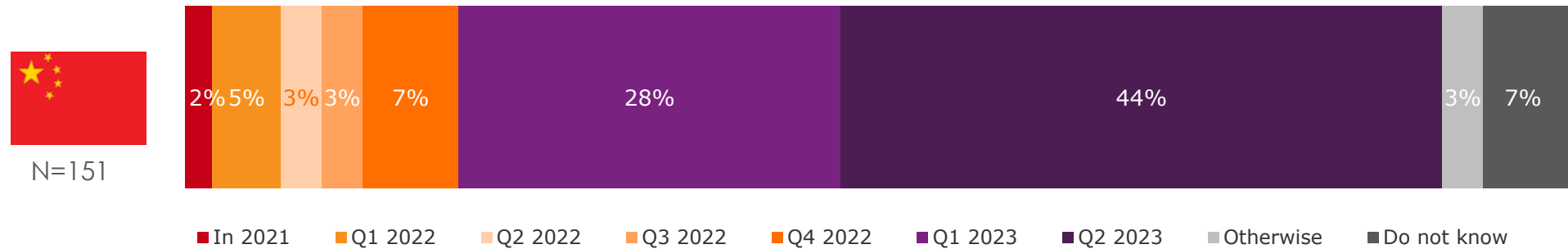
China	
N=151	
January	1%
February	2%
March	3%
April	1%
May	2%
June	19%
July	28%
August	13%
September	8%
October	17%
November	5%
December	2%

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

Q: In which month will you leave for your next holiday (in the next 12 months)?



44% of those who have already booked a holiday booked in the second quarter of 2023. Many bookings were also made in the first quarter of (28%).




Base: People who have already booked a holiday

Q: When did you book your next holiday?



Of the aspects listed below, flexible cancellation conditions are considered most important by Chinese respondents when choosing a holiday destination (82% consider this aspect (very) important). This is followed by the aspects of 'rising prices' (61%) and 'staying in a quiet place' (60%).

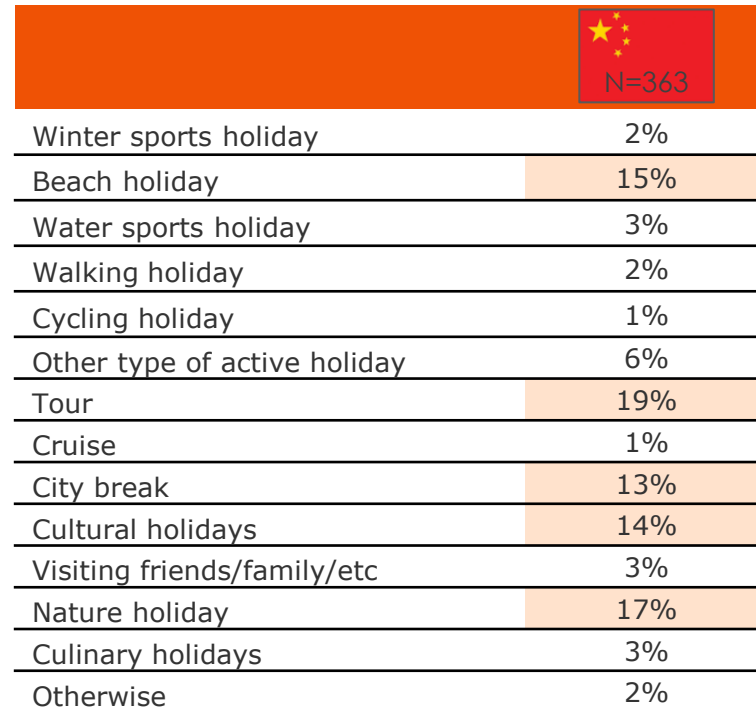
 N=363	
Flexible cancellation conditions	82%
Development of Corona at the destination	58%
Stay in quiet place	60%
Development of the war in Ukraine	56%
Rising prices (fuel, energy, inflation)	61%
Crowds at airports	42%
Sustainability (minimising environmental impact)	50%

Base: People with holiday plans for next 12 months (booked or yet to book)
Percentage: top 2 (very important + important)
Highlighting: the three highest scores are bolded

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



Chinese respondents most often characterise their next holiday as a tour (19%). Followed by nature holidays (17%) and beach holidays (15%). This is followed by cultural holidays (14%) and city trips (13%).




Base: People with holiday plans for next 12 months (booked or yet to book)
Highlight: 5 highest scores

Q: How would you characterise your next holiday?



47% of Chinese interviewees who have not yet booked, but have the intention of going on holiday, are already planning on their upcoming holiday. If they have a holiday intention but are not yet planning, it is mainly because they have not yet had time to do so (21%).

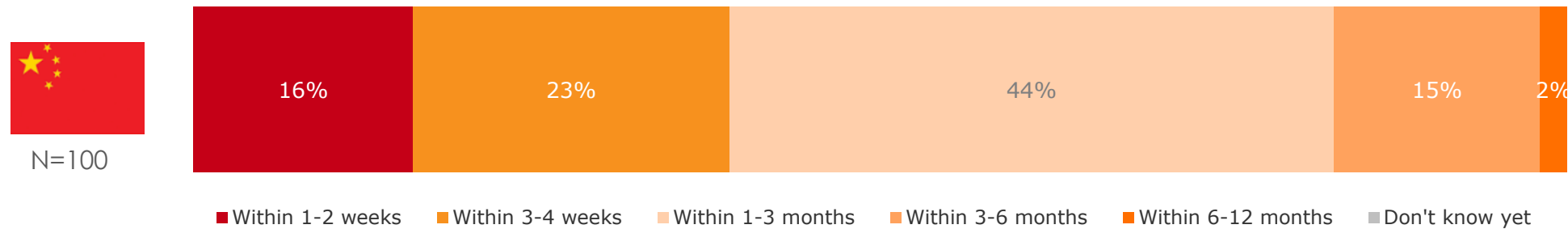
 N=212	
Yes	47%
No, I haven't had time to look yet	21%
No, my financial situation does not allow it (e.g. due to inflation and rising prices)	13%
No, due to uncertainties surrounding coronavirus development	12%
No, because of uncertainties surrounding the war in Ukraine	5%
No, for another reason	2%

Base: People who have not yet booked (but have holiday intentions for the next 12 months)

Q: Are you already looking for your next holiday?



Among those who are planning for a holiday in the next 12 months, the largest group plans to book it within 1 to 3 months (44%). In addition, 23% say they plan to book within 3 to 4 weeks.

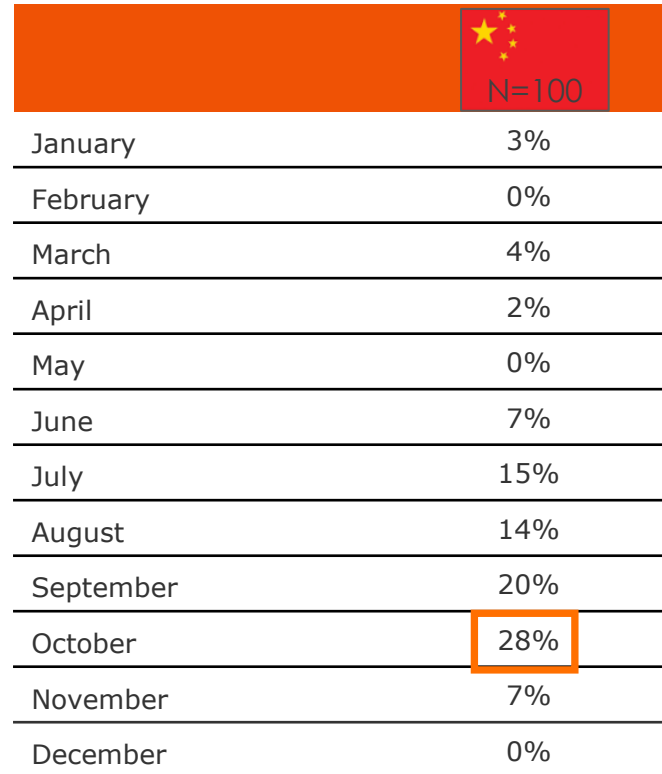


Base: People who have yet to book holidays but are already looking

Q: How long in advance do you normally book your holidays?



Of the group that has holiday intentions but has yet to book, 28% plan to leave in October 2023. In addition, 20% are planning to leave in September.



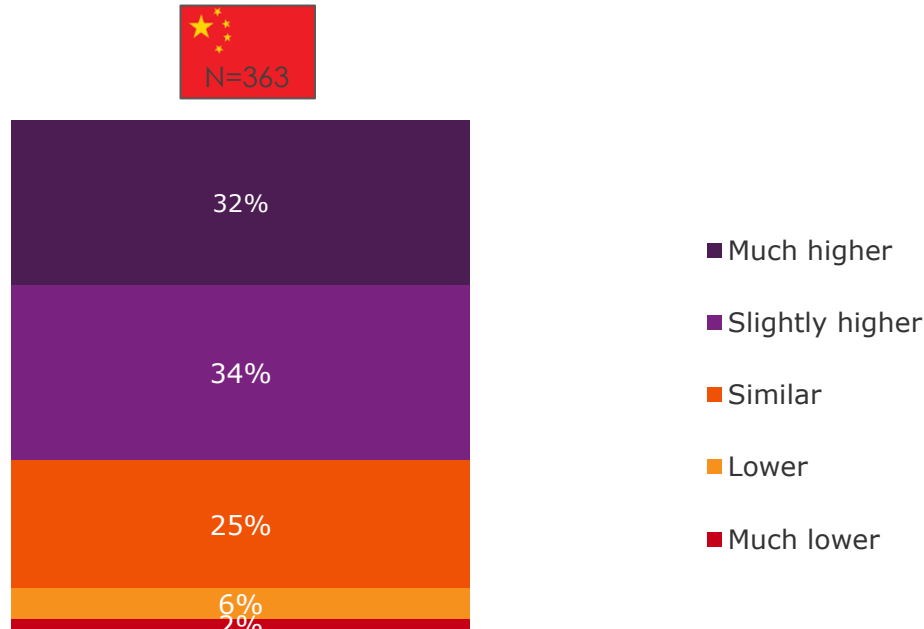
Base: people who have already booked a holiday
Highlight: the highest percentage

Question: In which month do you plan to leave you for your next holiday (in the next 12 months)?



Of those surveyed with holiday plans, 25% say they have a similar holiday budget for their next holiday as in previous years. Furthermore, as many as 66% say they have slightly more or much more budget than in previous years. This could be due to an increased amount of saving during the extensive Corona lockdown period.

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



Base: People with holiday plans for the next 12 months (booked or yet to book)

Q: Which situation is most applicable to you?

Chinese respondents indicated that if they adjust their holiday behaviour (because of higher prices), they do so mainly by avoiding the high season (56%) or by opting for cheaper transport (52%).



China	
	N=244
Shorter holidays	18%
Less frequent holidays	35%
Cheaper accommodation/lodging	36%
Cheaper transport	52%
Save at destination itself	34%
Avoiding the high season	56%
Other, namely	0%

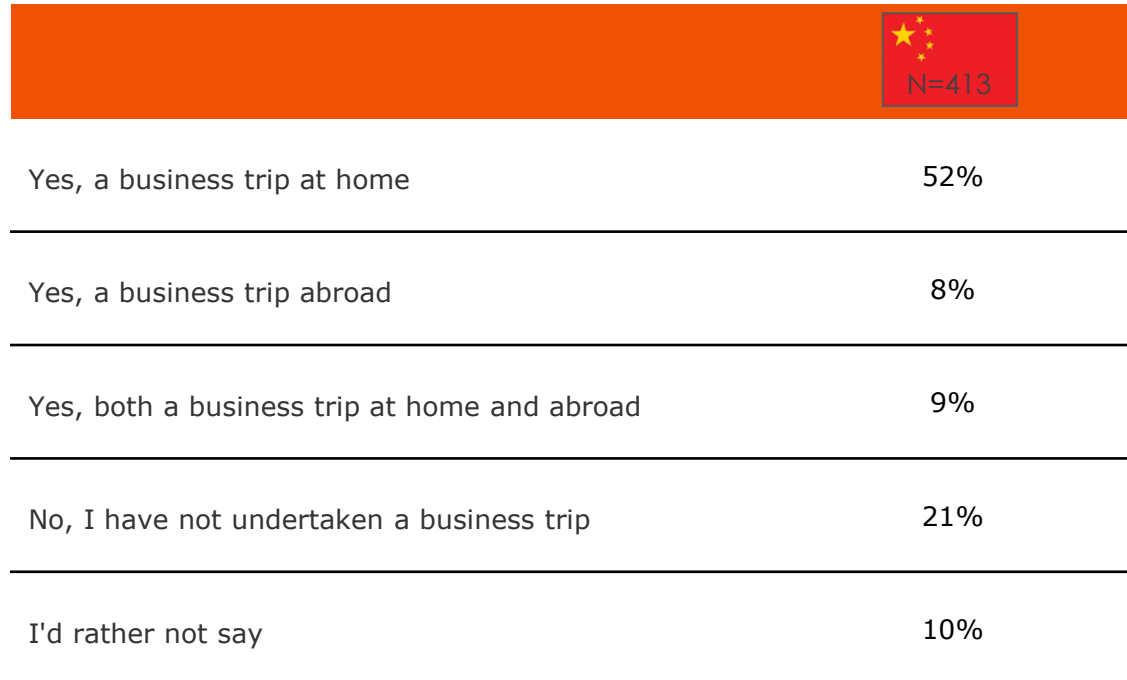
Base: People who (totally) agree with the statement 'Rising prices (fuel, gas/energy, groceries, etc.) are forcing me to adjust my holiday behaviour'
Highlighting: the highest scores are bolded

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



52% of Chinese respondents have undertaken a business trip domestically (including overnight stay) in the past 12 months. Business trips abroad were also undertaken, albeit to a lesser extent. Furthermore, 21% have not undertaken any business trip at all and 10% prefer not to say.

In the past 12 months, have you undertaken a business trip (including overnight stay) for work either at home or abroad?




Base: everyone (entire sample)



For the next 12 months, about 60% of Chinese respondents plan to undertake a business trip (including overnight stay) at home or abroad. 21% indicate 'multiple business trips at home' and 17% 'multiple business trips at home and abroad'.

In the next 12 months, do you plan to undertake a business trip (including overnight stay) for work either at home or abroad?

	
Yes, one business trip at home	8%
Yes, multiple business trips at home	21%
Yes, one business trip abroad	10%
Yes, several business trips abroad	4%
Yes, multiple business trips at home and abroad	17%
No	31%
I'd rather not say	10%

Base: everyone (entire sample)



Claire Droppert
Photography

Element	Description																
Method:	Online																
Target audience:	<table border="0"> <tr> <td>0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>9-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> </tr> <tr> <td>2-measurement: NL/BE/DE/UK</td> <td>10-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> </tr> <tr> <td>3-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>11-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>4-measurement: NL/BE/DE/UK</td> <td>12-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>5-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>13-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>6-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>14-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>7-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>15-measurement: NL/BE/DE/FR/UK/USA</td> </tr> <tr> <td>8-measurement: NL/BE/DE/FR/UK/USA/CHINA</td> <td>16-measurement: NL/BE/DE/FR/UK/USA + CHINA</td> </tr> </table>	0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA	9-measurement: NL/BE/DE/FR/UK/USA/CHINA	2-measurement: NL/BE/DE/UK	10-measurement: NL/BE/DE/FR/UK/USA/CHINA	3-measurement: NL/BE/DE/FR/UK/USA/CHINA	11-measurement: NL/BE/DE/FR/UK/USA	4-measurement: NL/BE/DE/UK	12-measurement: NL/BE/DE/FR/UK/USA	5-measurement: NL/BE/DE/FR/UK/USA/CHINA	13-measurement: NL/BE/DE/FR/UK/USA	6-measurement: NL/BE/DE/FR/UK/USA/CHINA	14-measurement: NL/BE/DE/FR/UK/USA	7-measurement: NL/BE/DE/FR/UK/USA/CHINA	15-measurement: NL/BE/DE/FR/UK/USA	8-measurement: NL/BE/DE/FR/UK/USA/CHINA	16-measurement: NL/BE/DE/FR/UK/USA + CHINA
0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA	9-measurement: NL/BE/DE/FR/UK/USA/CHINA																
2-measurement: NL/BE/DE/UK	10-measurement: NL/BE/DE/FR/UK/USA/CHINA																
3-measurement: NL/BE/DE/FR/UK/USA/CHINA	11-measurement: NL/BE/DE/FR/UK/USA																
4-measurement: NL/BE/DE/UK	12-measurement: NL/BE/DE/FR/UK/USA																
5-measurement: NL/BE/DE/FR/UK/USA/CHINA	13-measurement: NL/BE/DE/FR/UK/USA																
6-measurement: NL/BE/DE/FR/UK/USA/CHINA	14-measurement: NL/BE/DE/FR/UK/USA																
7-measurement: NL/BE/DE/FR/UK/USA/CHINA	15-measurement: NL/BE/DE/FR/UK/USA																
8-measurement: NL/BE/DE/FR/UK/USA/CHINA	16-measurement: NL/BE/DE/FR/UK/USA + CHINA																
Sample source:	The sample was drawn from Dynata's consumer panel (except for 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:	<p>0 measurement: 21 May 2020 to 1 June 2020</p> <p>1 measurement: 17 June 2020 to 26 June 2020</p> <p>2-measurement: 24 July 2020 / 28 July 2020</p> <p>3 measurement: 7 September 2020 to 18 September 2020</p> <p>4-measurement: 27 October 2020 to 1 November 2020</p> <p>5-measurement: 7 January 2021 to 13 January 2021</p> <p>6-measurement: 18 March 2021 to 23 March 2021</p> <p>7-measurement: 19 May 2021 to 25 May 2021</p> <p>8-measurement: 1 July 2021 to 6 July 2021</p> <p>9-measurement: 1 September 2021 to 7 September 2021</p> <p>10-measurement: 15 November 2021 to 21 November 2021</p> <p>11-measurement: 31 March 2022 to 6 April 2022</p> <p>12-measurement: 13 June 2022 to 21 June 2022</p> <p>13-measurement: 2 September 2022 to 8 September 2022</p> <p>14-measurement: 5 December to 9 December 2022</p> <p>15-measurement: 9 March to 14 March 2023</p> <p>16-measurement: 1 June to 7 June 2023</p>																





NBTC

Nederlands Bureau
voor Toerisme &
Congressen