

# Holiday Sentiment Monitor

## Results 21-measurement

September 2024

# Take outs



- 1. 87% of respondents have a holiday intention. Among Dutch people it is 86%, the same as a year ago.**

On average, 87% of those surveyed from six countries have an intention to go on holiday in the next 12 months. This could be a short or long holiday at home or abroad. A year ago, an average of 85% had a holiday intention. Of the Dutch, 86% currently have a holiday intention, the same as a year ago.
- 2. 42% have already booked a holiday, with most of them leaving in September and October.**

On average, 42% have already booked a holiday sometime in the next 12 months. A year ago, this was also 42% on average. The proportion who have already booked is currently highest among Britons (48%) and lowest among Belgians (36%). Of those who have already booked a holiday, the next holiday is mostly in September and October (the measurement/survey ran during the first week of September). Compared to a year ago, more holidays are now booked for October, November and December.
- 3. Market potential: 45% of respondents have holiday intentions but have yet to book. And of these, 61% are already planning.**

45% of those surveyed say they have yet to book, but do have a holiday intention in the next 12 months. Of that group, 61% are already planning. They mostly focus on the month of October (average 21%). Among the British, October and December are equally looked at as departure months. Belgians are to a large extent already planning for July 2025. The Dutch now plan twice as much for April compared to a year ago.
- 4. Booking directly with the provider is now done more often than a year ago.**

Among the Dutch, Belgians, French and British, this way of booking ('directly with the provider') has increased compared to a year ago. This can be, for example, directly with the accommodation and/or with the transport company. Germans book most often through a travel organisation/booking website.
- 5. Quarter of Dutch holidaymakers take next holiday at home.**

Around a quarter of Dutch holidaymakers (24%) plan to spend their next holiday in their own country; just under 60% will do so elsewhere in Europe. Belgians and French are planning in lesser numbers to spend their next holiday at home than a year ago. The French are choosing more to go elsewhere in Europe and this is also true for Germans. Belgians are choosing Asia more than a year ago.
- 6. Noord-Holland, Drenthe and Limburg most considered for holiday in their own country.**

Dutch people who want to spend their next holiday/weekend break in the Netherlands say they most want to do so in Noord-Holland (12%). This is followed by Drenthe and Limburg (11% and 10% respectively). Compared to a year ago, Noord-Holland has increased and Zuid-Holland has decreased.



# Take outs



- 7. Netherlands in top 5 European holiday destinations among Belgians, shared 7<sup>th</sup> place among Germans.**  
Spain is again the most chosen country for a holiday. Among Belgians, France ranks highest and the Netherlands currently ranks fifth, together with Portugal. Among Germans, the Netherlands has a shared seventh place in terms of holiday destination in Europe. Besides Spain, Italy and Greece are also frequently in the top five of the markets surveyed.
- 8. Aeroplane remains most chosen means of transport.**  
51% of Dutch people expect to take the plane to their next holiday destination (in Europe), whereas 36% will go by car. Dutch people who will take their next holiday with their family choose the car as means of transport to a relatively high degree. Dutch solo travellers and/or groups of friends opt significantly less for the car. They opt most often for the plane, but the train also scores relatively highly among these two groups.
- 9. Over 1 in 10 Dutch people experienced extreme weather this summer.**  
Of all Dutch people questioned, 52% went on holiday this summer (July/August), and of that group, 24% experienced extreme weather (such as a heat wave, forest fire or extreme rainfall) during that holiday. A year ago, this was 27%. In terms of numbers, this means that of all Dutch people in this survey (September 2024), more than 1 in 10 experienced extreme weather this summer.
- 10. Rising/high prices still play a role in holiday choices.**  
On average 50% of all respondents said they were forced to adjust their holiday behaviour as a result of rising prices. A year ago, this was 46% on average. Currently, the top 2 score ranges from 42% among Dutch people to 56% among Germans. Most respondents choose to go on holiday less often as a saving measure.
- 11. Awareness of AI tools such as ChatGPT increased.**  
On average, 39% of respondents are familiar with and have used AI tools such as ChatGPT. Last time this was measured, in December 2023, the average was 30%. Awareness of AI has increased significantly over nine months in all six countries in this survey. Furthermore, on average 43% know what it is but have never used it. On average, 18% do not know what an AI tool such as ChatGPT is. The younger the age group, the more familiar they are with AI tools such as ChatGPT and the more they have used it at some point.



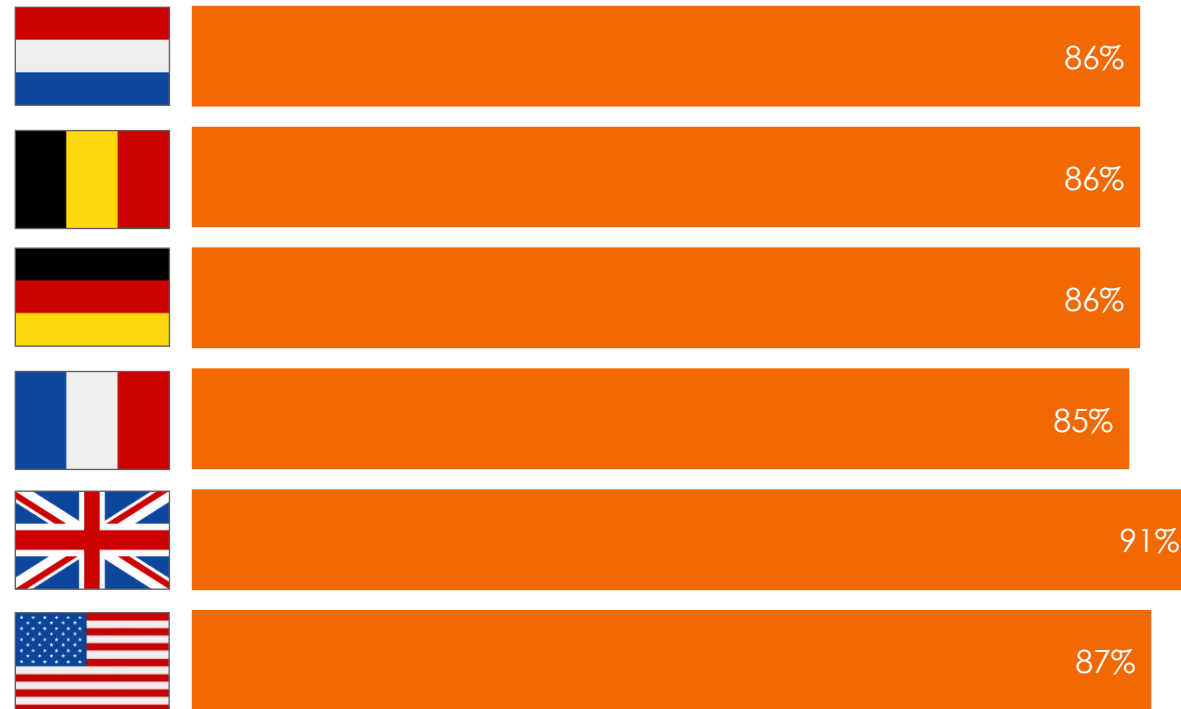


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# 1. Holiday planning results

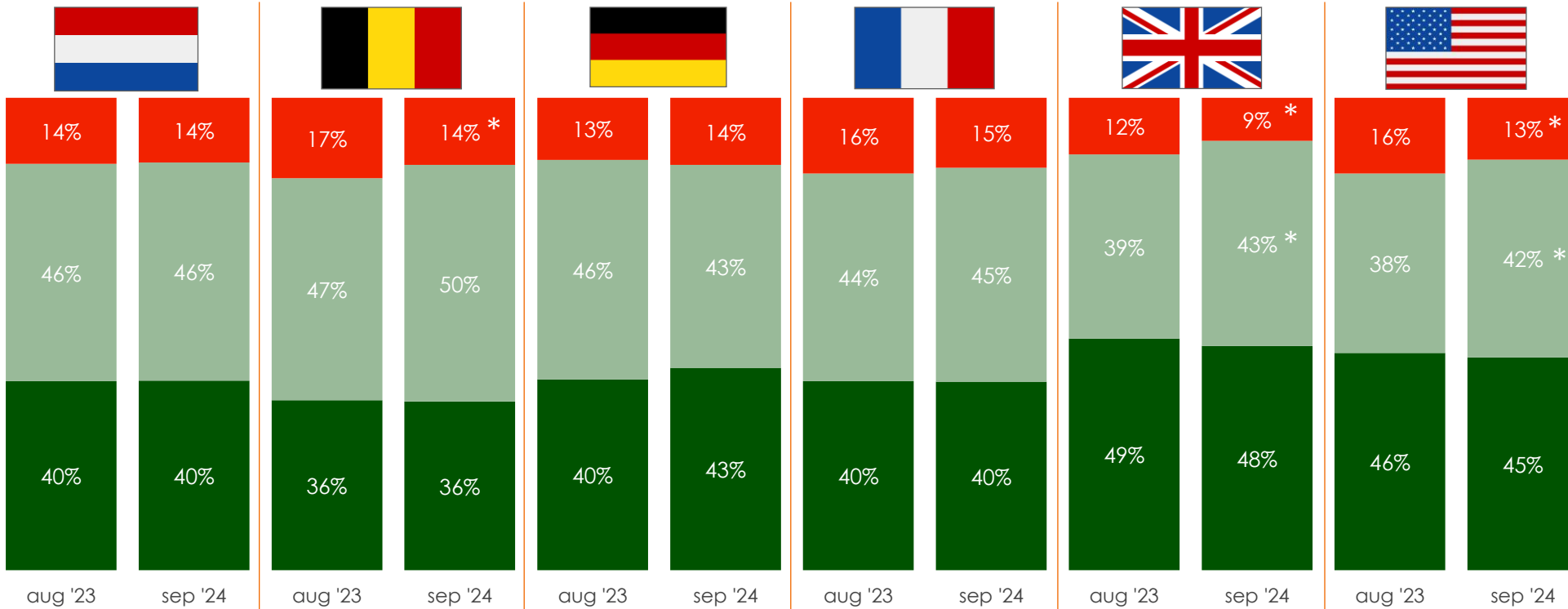
On average, 87% of respondents from these six countries have an intention to go on holiday in the next 12 months, some of whom have already booked and some of whom have yet to book. These could be short or long holidays at home or abroad. A year ago, an average of 85% had a holiday intention.



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

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

In the first week of September (2024), an average of 42% of respondents say they have already booked a holiday sometime in the next 12 months. A year ago, in the last week of August (2023), this was also 42% on average. The proportion who have already booked is highest among Britons (48%).



■ Yes, already booked

■ Yes, have yet to book

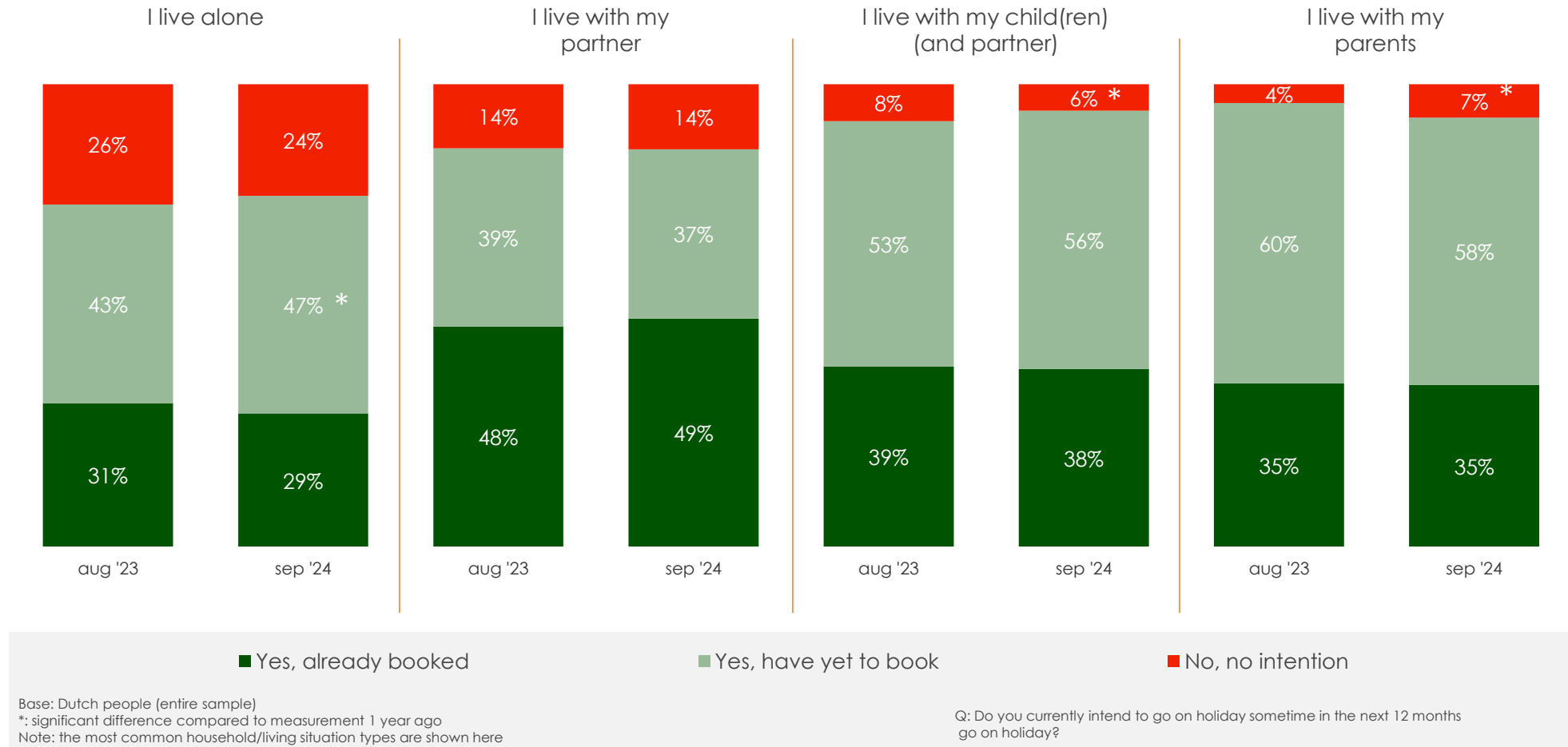
■ No, no intention

Base: everyone (entire sample)

\*: significant difference compared to the measurement 1 year ago

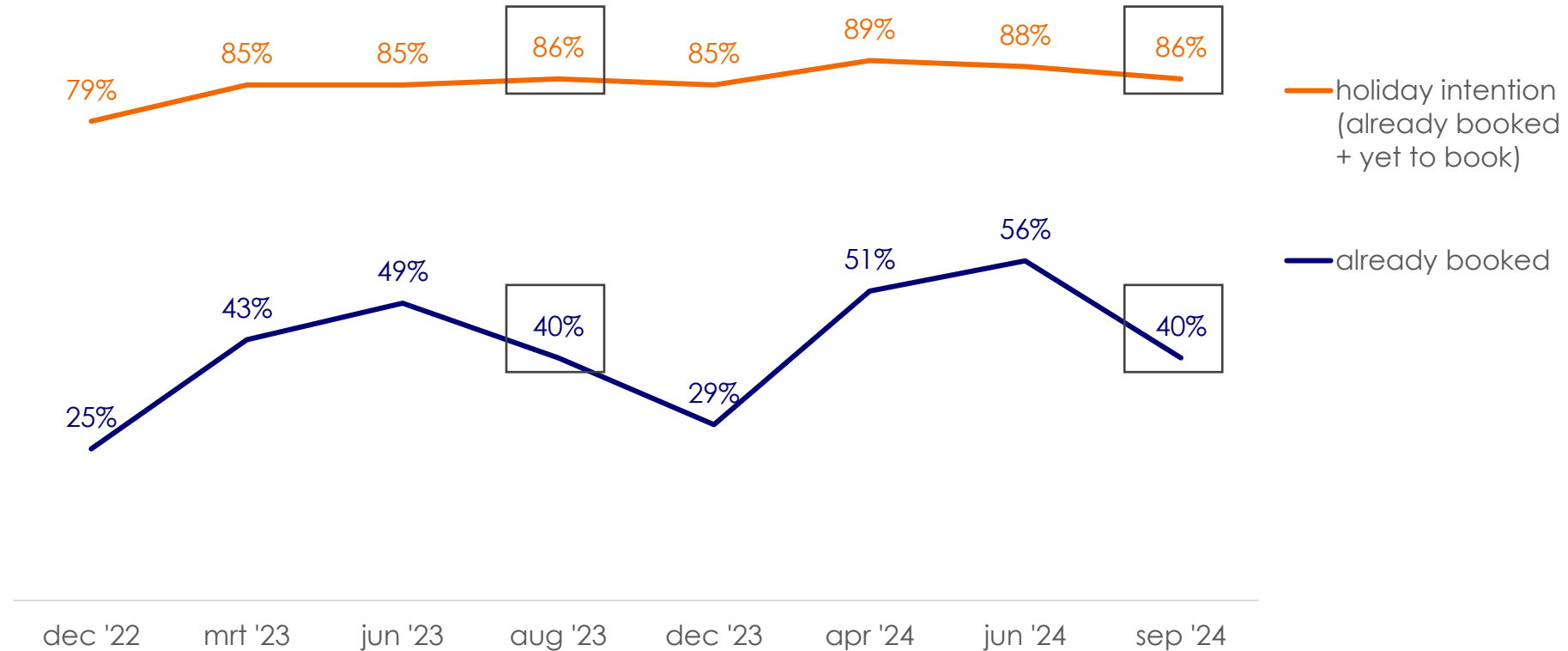
Q: Do you currently intend to go on holiday sometime in the next 12 months?

Dutch people living with their partner have the highest percentage of already booked holidays in the next 12 months. A year ago, this group also had the highest percentage of 'already booked'. Among Dutch people living alone, the share that has no holiday intention for the next 12 months is the highest (24%).



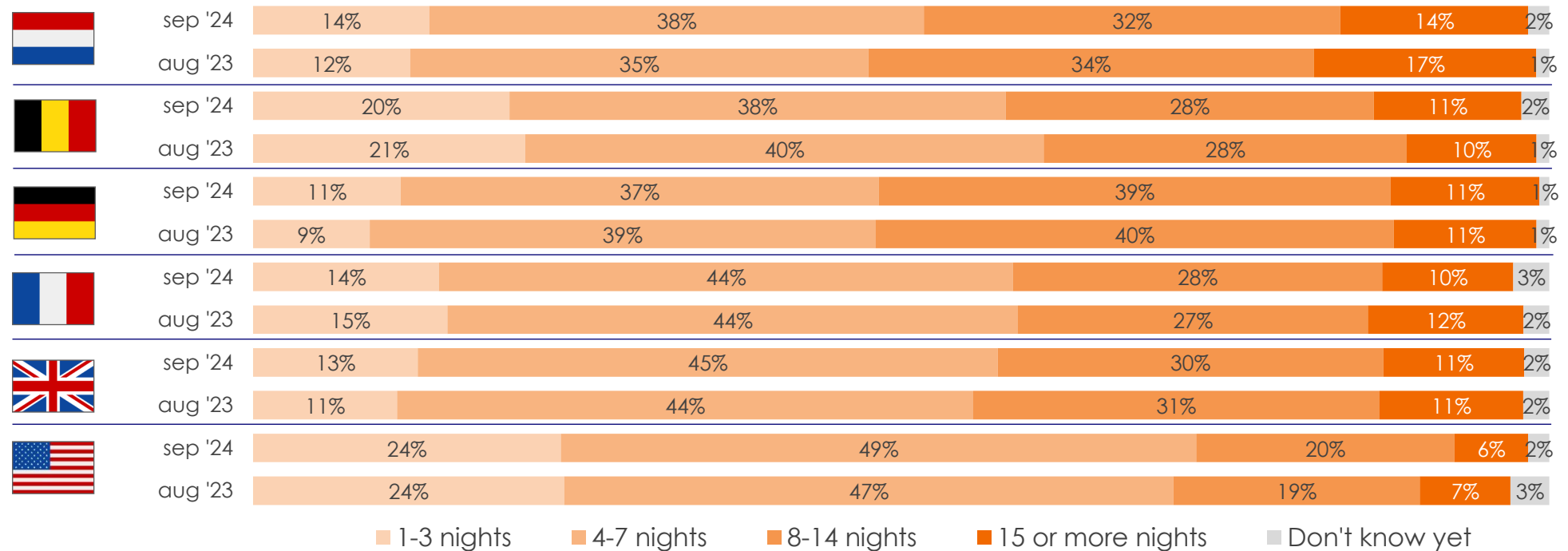


Holiday intention among Dutch people (already booked + have yet to book) in the first week of September (2024) is 86%. This is exactly the same percentage as a year ago (the last week of August, 2023). The share of Dutch people who have already booked is also exactly the same as a year ago (40%). The share of 'already booked' increases each time in spring / towards the summer and decreases again at the end of the summer. Each time, this concerns a holiday intention in the next 12 months.





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 and Belgians, the proportion of short holidays (1-3 nights) is higher than among the other countries.

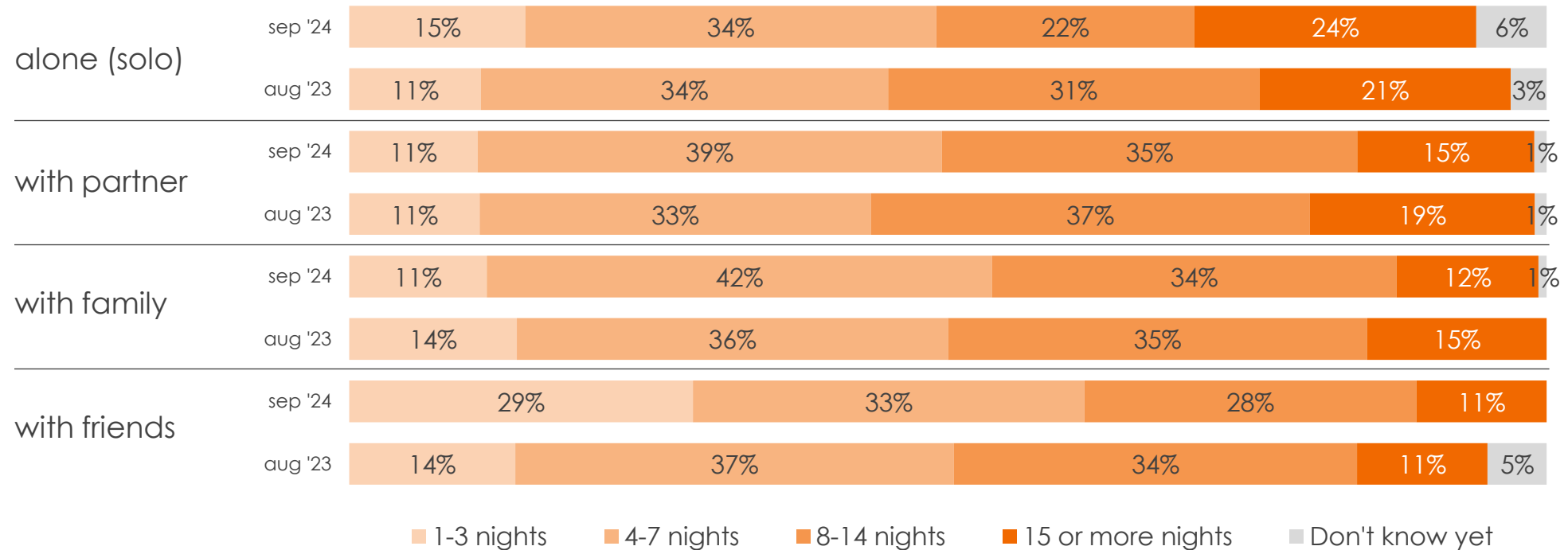


Base: People with holiday plans for the next 12 months (booked or yet to book)

Q: How long do you plan to be away on your next holiday?



Significantly more Dutch groups of friends have plans for a short trip (1-3 nights) in the next 12 months; this share has doubled compared to a year ago. Among immediate family/other relatives, the 4-7 nights category has grown compared to a year ago and this is mainly at the expense of a 1-3 nights or 15+ nights trip. The 15+ nights category is chosen most often by solo travellers (24%).









Base: People with holiday plans for the next 12 months (booked or yet to book)  
 Note: the most common travel companion types are shown here

Q: How long do you plan to be away on your next holiday?



In general, most people booked directly with the provider (average 50%). Among the Dutch, Belgians, French and British, this way of booking increased compared to a year ago. Germans book most often through a travel organisation/booking website.

						
Directly with the provider (e.g. directly with the hotel/accommodation/ transport company)	50% (45%)	47% (41%)	40% (41%)	48% (44%)	51% (46%)	62% (67%)
Through a travel agent/ tour operator or booking website	38% (41%)	40% (46%)	45% (43%)	37% (40%)	36% (38%)	24% (18%)
A combination of the above two options	9% (10%)	7% (9%)	11% (12%)	12% (12%)	11% (13%)	11% (11%)
Other, namely	2% (4%)	4% (4%)	2% (3%)	2% (3%)	1% (2%)	3% (3%)
Don't know	1% (1%)	1% (1%)	1% (1%)	1% (2%)	1% (1%)	0% (1%)

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

Base: People who have already booked a holiday for the next 12 months.  
Tag: the highest percentage by country.  
In brackets, the score of the measurement one year ago (end August 2023).

Q: How is your next holiday booked?

Dutch people who are going to spend their next holiday in their own country have to a much higher extent booked directly with the provider than Dutch people who will spend their next holiday elsewhere in Europe. Among the group that will spend their holidays elsewhere in Europe, the numbers booking directly with the provider or via a travel organisation/booking website are very similar; booking directly with the provider has increased compared to a year ago.



	Holidays in the Netherlands (own country)	Holidays in Europe (excl. Netherlands)
Directly with the provider (e.g. directly with the hotel/accommodation/transport company)	73% (72%)	43% (38%)
Through a travel agent/ Tour operator or booking website	18% (21%)	42% (45%)
A combination of the above two options	3% (2%)	12% (12%)
Other, namely	4% (4%)	2% (5%)
Don't know	3% (1%)	0% (1%)







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

Base: People who have already booked a holiday for the next 12 months.  
Tag: the highest percentage by country.  
In brackets, the score of the measurement one year ago (end August 2023).

Q: How is your next holiday booked?



Among those who have already booked a holiday, the next holiday is mostly in September (average 31%). A year ago, the September average was 35%, which may also be partly explained by the fact that the fieldwork of this monitor was a week earlier then (late August instead of early September). More holidays are booked for this October, November and December compared to last year.

						
January	1% (3%)	3% (3%)	1% (2%)	2% (1%)	2% (3%)	4% (4%)
February	4% (2%)	2% (2%)	2% (3%)	3% (3%)	3% (3%)	3% (3%)
March	2% (3%)	2% (3%)	3% (3%)	4% (3%)	2% (4%)	3% (3%)
April	3% (2%)	5% (3%)	2% (3%)	3% (3%)	3% (4%)	3% (3%)
May	3% (3%)	4% (3%)	5% (4%)	5% (5%)	5% (5%)	3% (5%)
June	4% (2%)	3% (3%)	5% (5%)	5% (5%)	4% (5%)	4% (3%)
July	5% (6%)	5% (3%)	6% (5%)	6% (7%)	5% (5%)	3% (2%)
August	4% (8%)	3% (4%)	3% (7%)	6% (8%)	5% (7%)	1% (4%)
September	34% (38%)	36% (44%)	30% (30%)	28% (33%)	33% (32%)	26% (35%)
October	23% (21%)	21% (18%)	28% (27%)	23% (19%)	21% (19%)	26% (20%)
November	10% (7%)	10% (9%)	8% (6%)	8% (7%)	8% (9%)	15% (11%)
December	7% (0%)	5% (4%)	7% (5%)	7% (7%)	9% (5%)	9% (6%)
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>


Base: people who have already booked a holiday  
 Highlight: highest percentage by country  
 In brackets, the score of the measurement one year ago (end August 2023).

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

## Departure month of holiday already booked



Dutch people who have already booked a holiday with their partner mostly leave in September (38%). Among Dutch people going on holiday with their immediate family/other relatives, October is currently the most frequently chosen departure month (25%). The latter is partly explained by the fact that the autumn holidays start in October.

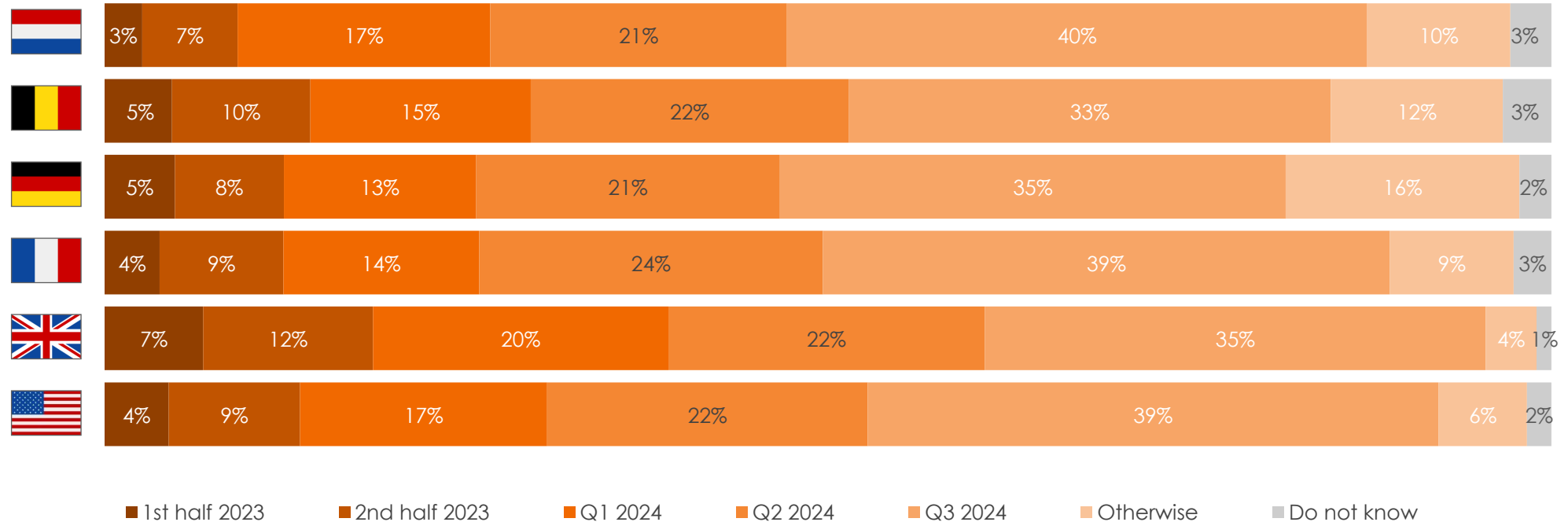
		With partner	With family
2025	January	1% (2%)	2% (3%)
	February	4% (3%)	3% (0%)
	March	2% (4%)	3% (2%)
	April	3% (1%)	5% (4%)
	May	2% (2%)	4% (4%)
	June	3% (3%)	2% (2%)
	July	4% (5%)	8% (8%)
	August	4% (5%)	6% (13%)
2024	September	38% (46%)	22% (27%)
	October	24% (21%)	25% (23%)
	November	10% (5%)	9% (9%)
	December	5% (5%)	10% (6%)
<b>Total</b>		<b>100%</b>	<b>100%</b>

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

Question: In which month will you leave for your next holiday?  
In brackets the score of the measurement one year ago.



Of those who have already booked a holiday for the next 12 months, the largest group booked it in July/August 2024 (37% on average). A fairly high number of people also booked in Apr/May/Jun 2024 (average 22%). Of these six countries, Britons book the furthest ahead.



Base: People who have already booked a holiday

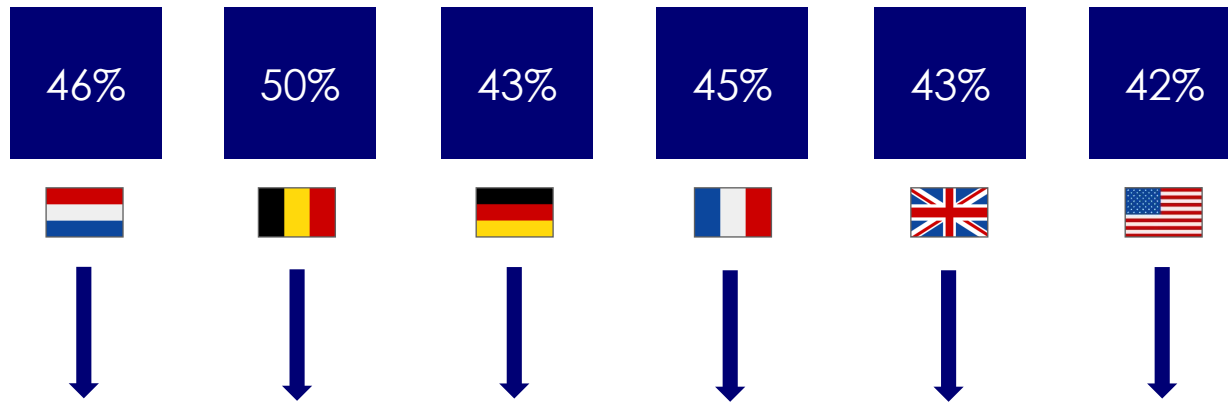
Q: When did you book your next holiday?



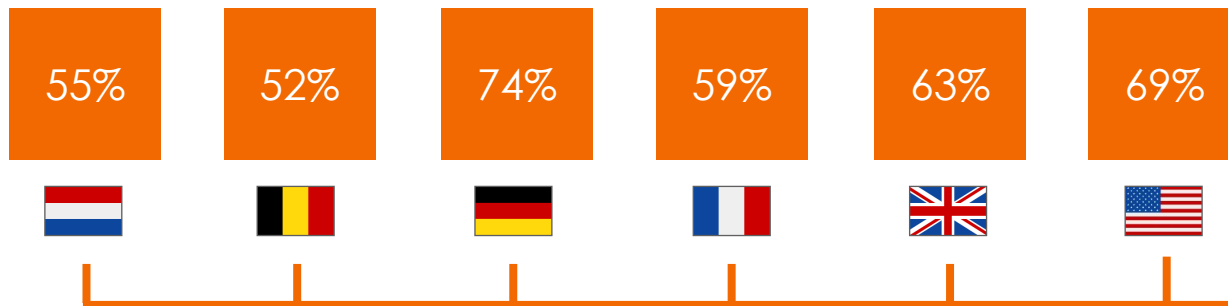
On average, 45% have a holiday intention for the next 12 months but have yet to book. Of this group that has yet to book, an average of 61% are planning a holiday. In this regard, October is currently the most looked at (21% on average). Among the British, October and December are equally looked at as departure months. A high number of Belgians are already planning for July 2025.



Holiday intention but have yet to book









Looking for holiday



<b>Month of departure:</b>						
2025						
January	4%	3%	2%	3%	2%	3%
February	3%	3%	3%	7%	4%	6%
March	4%	3%	3%	5%	6%	7%
April	8%	5%	5%	6%	7%	7%
May	10%	8%	8%	8%	10%	5%
June	5%	13%	10%	8%	8%	7%
July	10%	<b>18%</b>	11%	11%	6%	4%
August	6%	5%	9%	6%	8%	1%
September	10%	11%	8%	11%	8%	9%
2024						
October	<b>23%</b>	17%	<b>25%</b>	<b>20%</b>	<b>15%</b>	<b>25%</b>
November	7%	9%	7%	6%	12%	14%
December	9%	7%	9%	9%	<b>15%</b>	13%
Number	N=268	N=283	N=333	N=283	N=279	N=303

Of the Dutch who have yet to book their holidays, 8% are already looking at April. This is an increase compared to a year ago. In the other five countries, fewer are now looking at a September holiday (than a year ago). Among others, Germans, French and Americans are now looking more at the month of October.



						
January	4% (5%)	3% (3%)	2% (2%)	3% (4%)	2% (3%)	3% (5%)
February	3% (3%)	3% (5%)	3% (2%)	7% (4%) ↑	4% (4%)	6% (5%)
March	4% (4%)	3% (4%)	3% (6%) ↓	5% (3%)	6% (5%)	7% (5%)
April	8% (4%) ↑	5% (8%) ↓	5% (4%)	6% (5%)	7% (4%) ↑	7% (6%)
May	10% (12%)	8% (7%)	8% (11%) ↓	8% (5%) ↑	10% (7%) ↑	5% (8%) ↓
June	5% (9%) ↓	13% (7%) ↑	10% (10%)	8% (4%) ↑	8% (6%)	7% (10%) ↓
July	10% (12%)	18% (16%)	11% (10%)	11% (11%)	6% (15%) ↓	4% (6%)
August	6% (8%)	5% (5%)	9% (7%)	6% (11%) ↓	8% (9%)	1% (2%)
September	10% (11%)	11% (14%) ↓	8% (17%) ↓	11% (18%) ↓	8% (11%) ↓	9% (13%) ↓
October	23% (22%)	17% (18%)	25% (20%) ↑	20% (17%) ↑	15% (22%) ↓	25% (16%) ↑
November	7% (5%)	9% (8%)	7% (4%) ↑	6% (6%)	12% (8%) ↑	14% (16%)
December	9% (7%)	7% (6%)	9% (7%)	9% (12%) ↓	15% (9%) ↑	13% (9%) ↑
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

2025

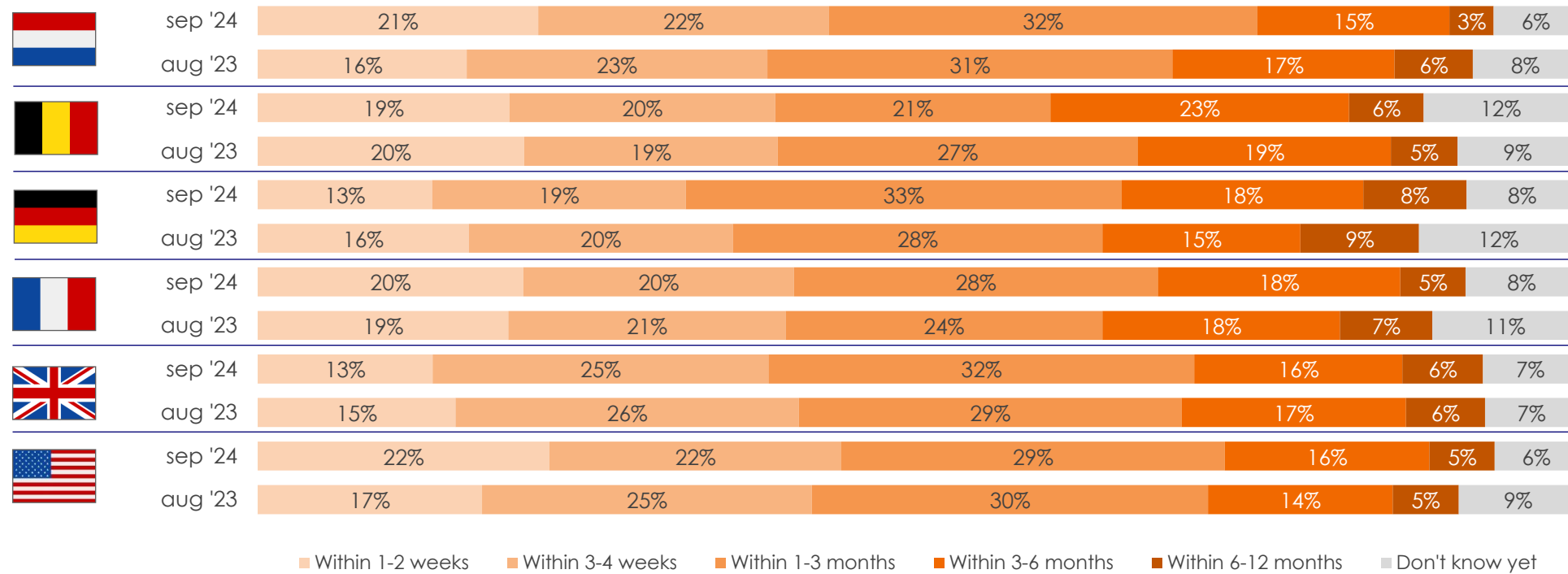
2024

Base: people who have yet to book.  
 Arrow: difference of at least 3 percentage points from year ago (green = increase; red = decrease).  
 In brackets the score of the measurement one year ago.

Question: When do you plan to leave for the next holiday you are planning on?



Of those who are planning a holiday in the next 12 months, the largest group is planning to book it within 1 to 3 months (29% on average). There is also another large group planning to book within 3 to 4 weeks (average 21%). Among Dutch and Americans, the proportion planning to book within 1-2 weeks has increased compared to a year ago.









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

Question: When do you plan to book your next holiday?

On average, 61% of people who have not yet booked, but intend to go on holiday in the next 12 months, are already planning their upcoming holiday. A year ago, this was similar (60%). If people do have a holiday intention, but are not yet planning, it is mainly because they have not got around to it yet (average 25%). Among Dutch people, their financial situation plays a relatively small role in this (6%).

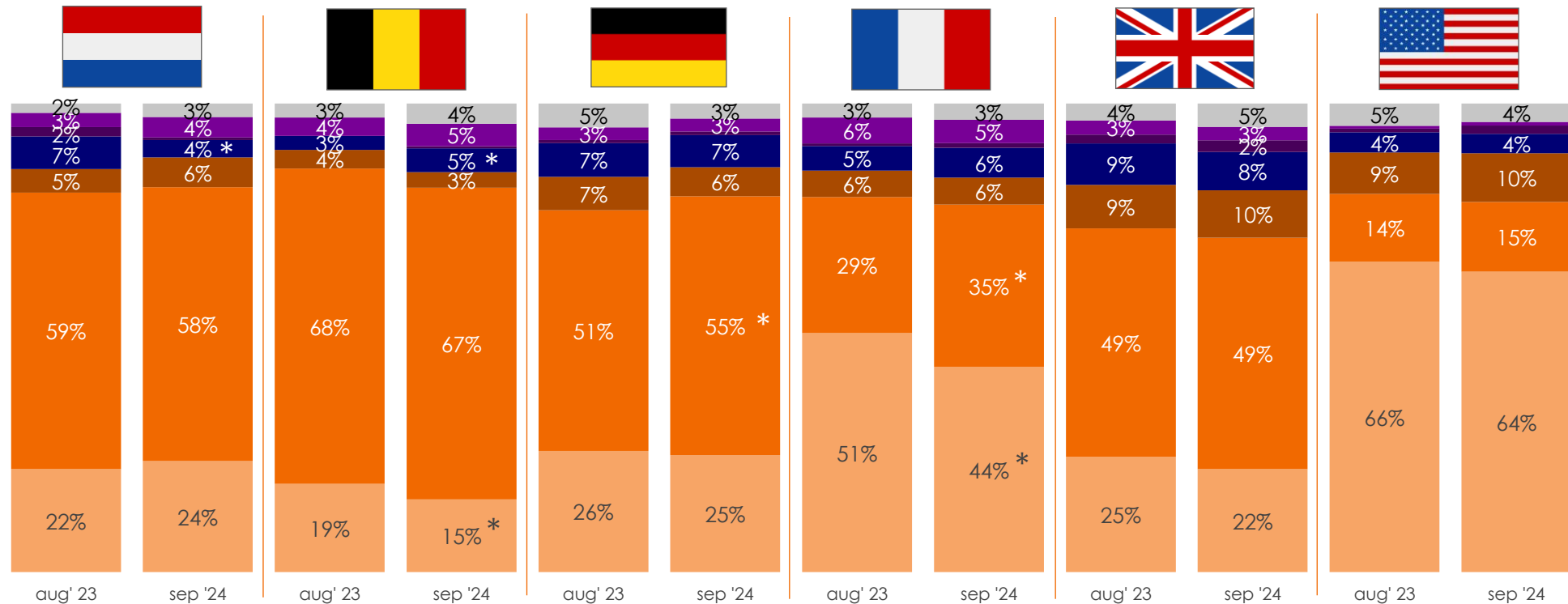


						
Yes (already looking/planning)	55% (58%)	52% (47%)	74% (71%)	59% (59%)	63% (62%)	69% (66%)
No, I haven't got around to it yet	35% (31%)	34% (34%)	14% (17%)	28% (28%)	21% (20%)	17% (17%)
No, my financial situation does not allow it (e.g. due to inflation and rising prices)	6% (5%)	10% (11%)	8% (7%)	10% (9%)	11% (12%)	12% (10%)
No, because of uncertainties surrounding current wars	1%	2%	4%	2%	2%	1%
No, for another reason	3%	2%	1%	0%	2%	2%

Base: People who have not yet booked (but have holiday intentions for the next 12 months)  
In brackets: score from one year ago (last week of August 2023)

Q: Are you already looking/planning for your upcoming holiday?

Less Belgians and French are planning to spend their next holiday in their own country than a year ago. The French are opting more for elsewhere in Europe and this is also true for Germans. Belgians are choosing Asia more than a year ago. Around a quarter of Dutch people plan to spend their next holiday at home; just under 60% will do so elsewhere in Europe.

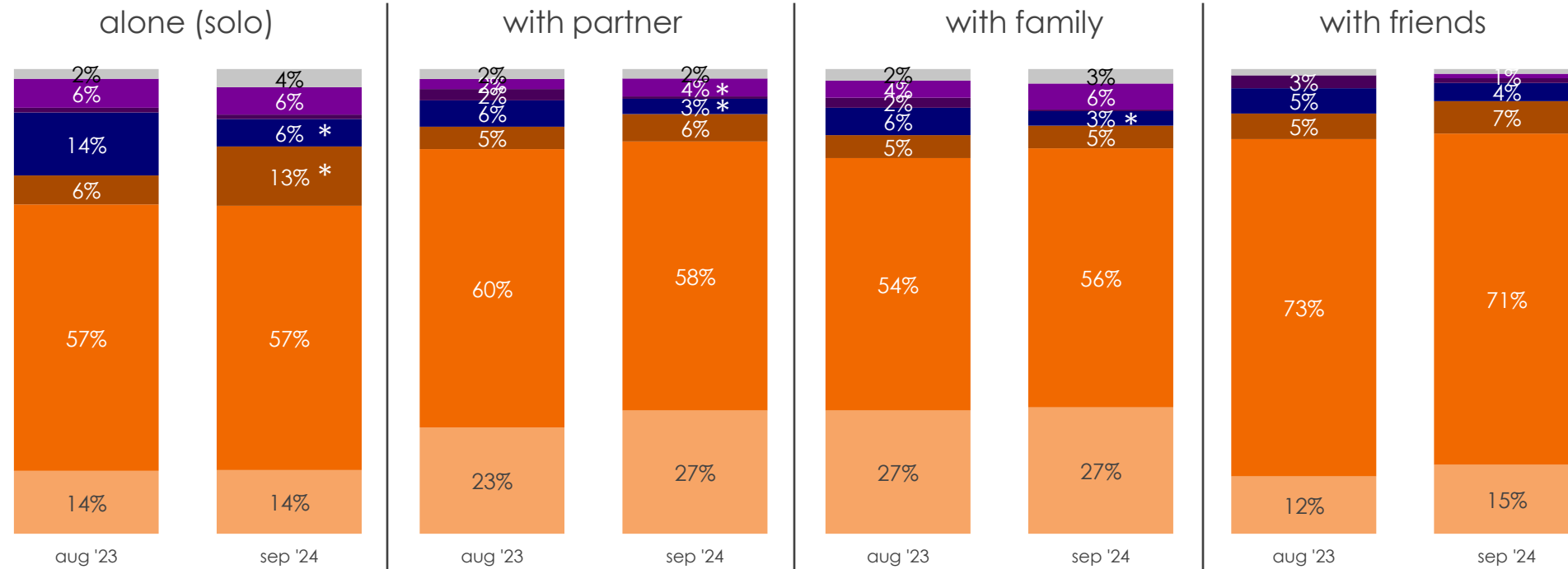


Own country Europe North/South America Asia Australia/Oceania Africa Don't know yet

Base: People with holiday plans in the next 12 months (booked or have yet to book).  
 \*: significant difference compared to measurement 1 year ago

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

Dutch people going on holiday alone are more likely to plan to spend their next holiday in North/South America than a year ago. This is 'at the expense' of Asia. Dutch people going on holiday with a partner and/or family stay in their own country to the highest extent (27%). Groups of friends most often go on holiday elsewhere in Europe.

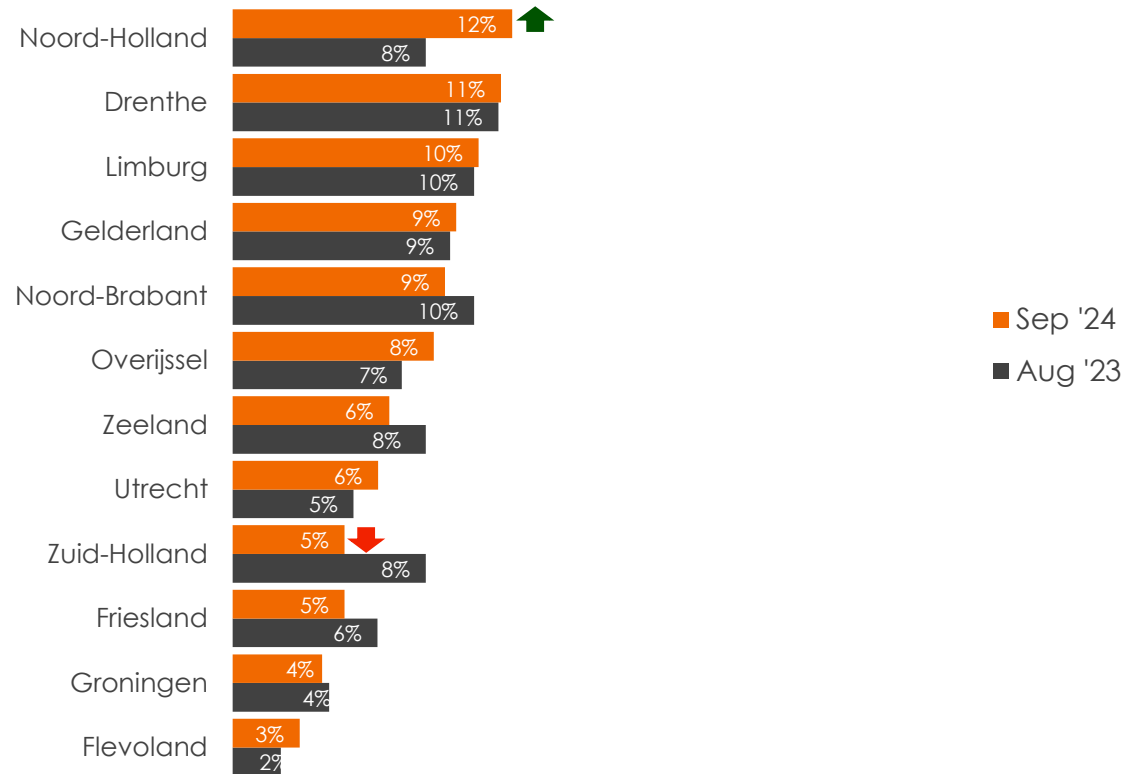


Own country Europe North/South America Asia Australia/Oceania Africa Don't know yet

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

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

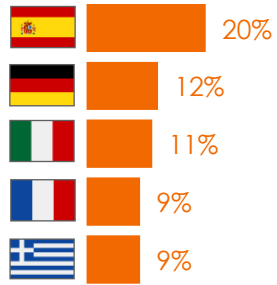
Dutch people who want to spend their next holiday/weekend break in the Netherlands say they most want to do so in North Holland (12%). This is followed by Drenthe and Limburg (11% and 10% respectively). Compared to a year ago, North Holland has increased and South Holland has decreased.



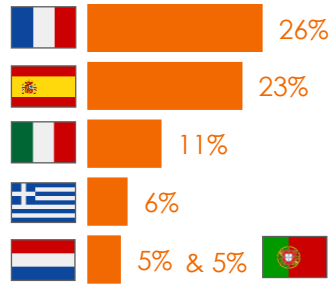
Base: Dutch people with holiday plans in the Netherlands (booked or yet to book)  
 Arrow: significant difference compared to a year ago

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

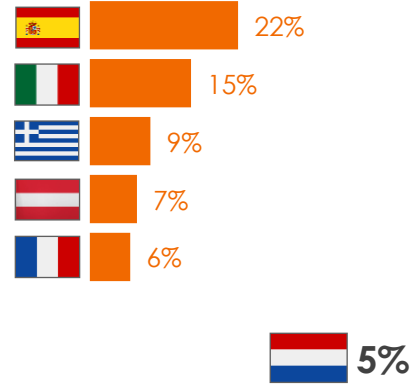
# NL



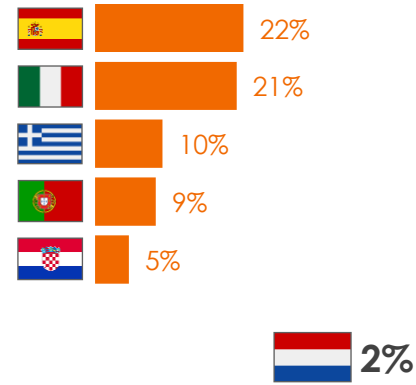
# BE



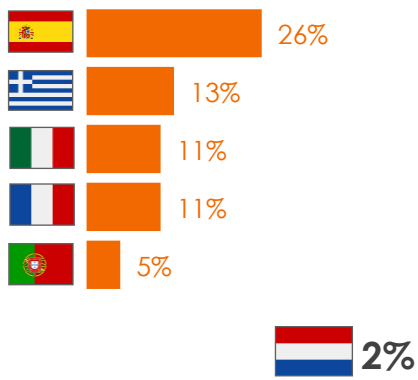
# DE



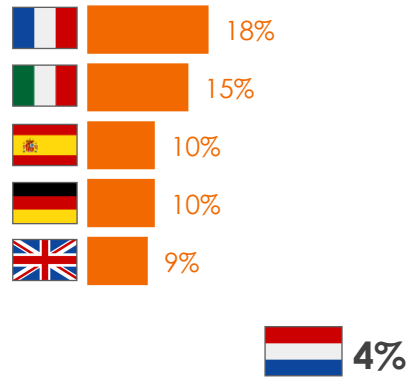
# FR



# UK



# US



- In all six countries, Spain returns in the top five, with the first spot in four cases.
- Among Belgians, France ranks highest and the Netherlands currently ranks fifth, along with Portugal.
- Among Germans, the Netherlands holds a shared seventh place in terms of holiday destination in Europe.
- Italy, like Spain, appears in the top five of all these countries. The same applies for Greece, except for the Americans.
- For the European countries, these top five (European) destinations each exclude their own country as a holiday destination.

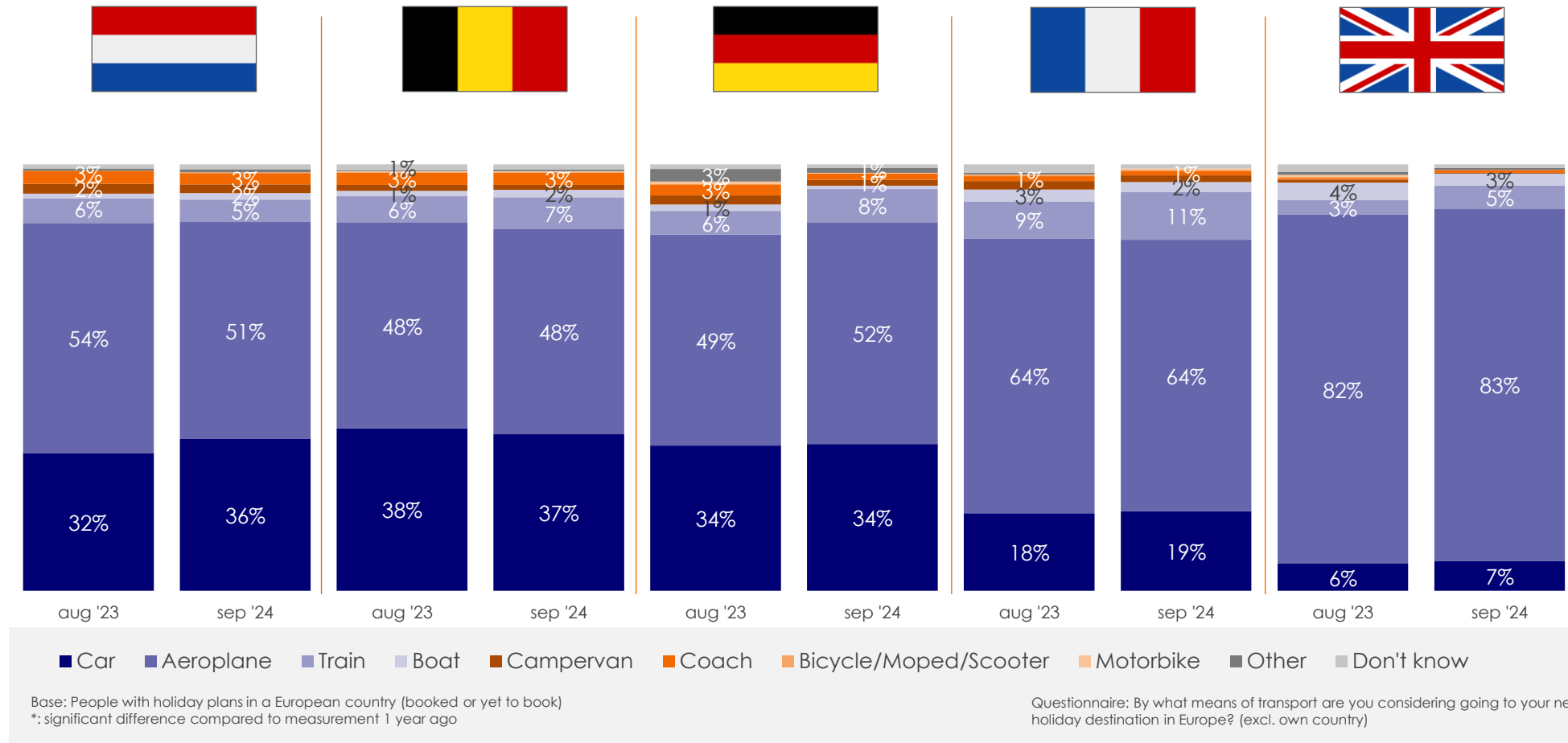
Base: People with holiday plans in Europe (booked or has yet to book)

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



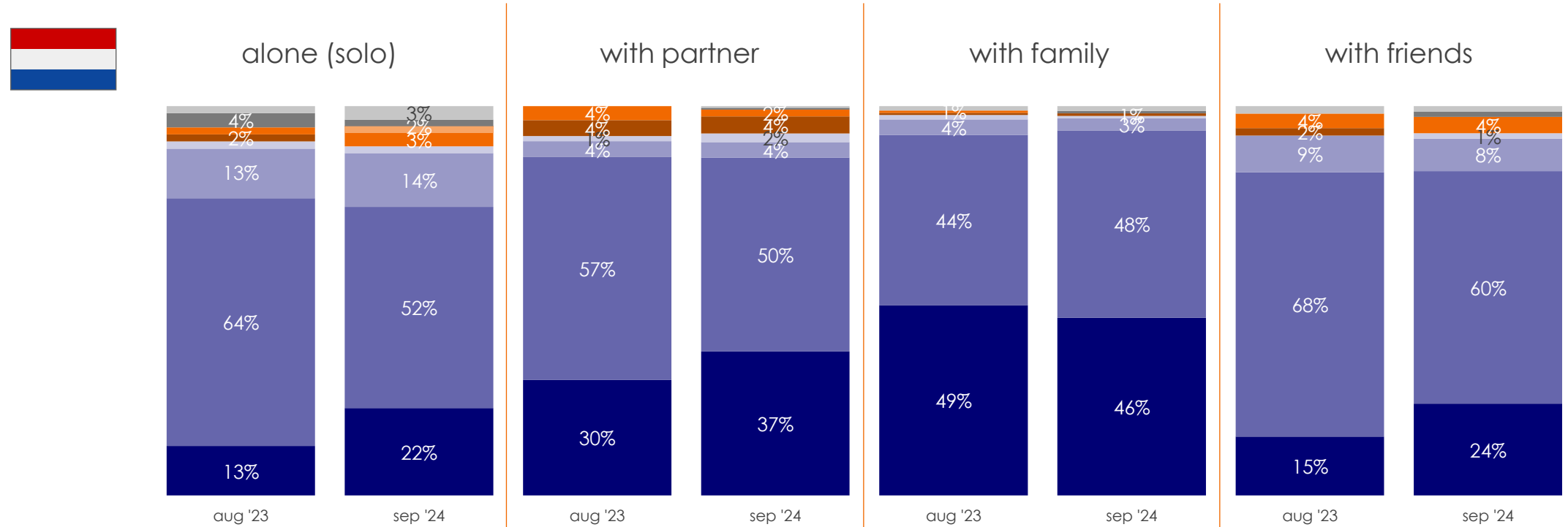


In all five countries, the plane is the most chosen means of transport for the next holiday in Europe (average 58%). A year ago, this was also 58% on average. Among Dutch people, there is a slight increase in the proportion going by car. Among Germans and British, the proportion travelling by train has increased compared to a year ago. Note: This transport question excludes holidays in a respondent's home country.





Dutch people going on their next holiday with their families choose the car as their means of transport to a relatively high degree. This slide refers to holidays in Europe (excluding own country). Dutch solo travellers and/or groups of friends opt significantly less for the car. They opt most often for the plane, but the train also scores relatively high among these two groups. It is also notable that the campervan is chosen to a higher extent by couples ('with partner') compared to the other groups.



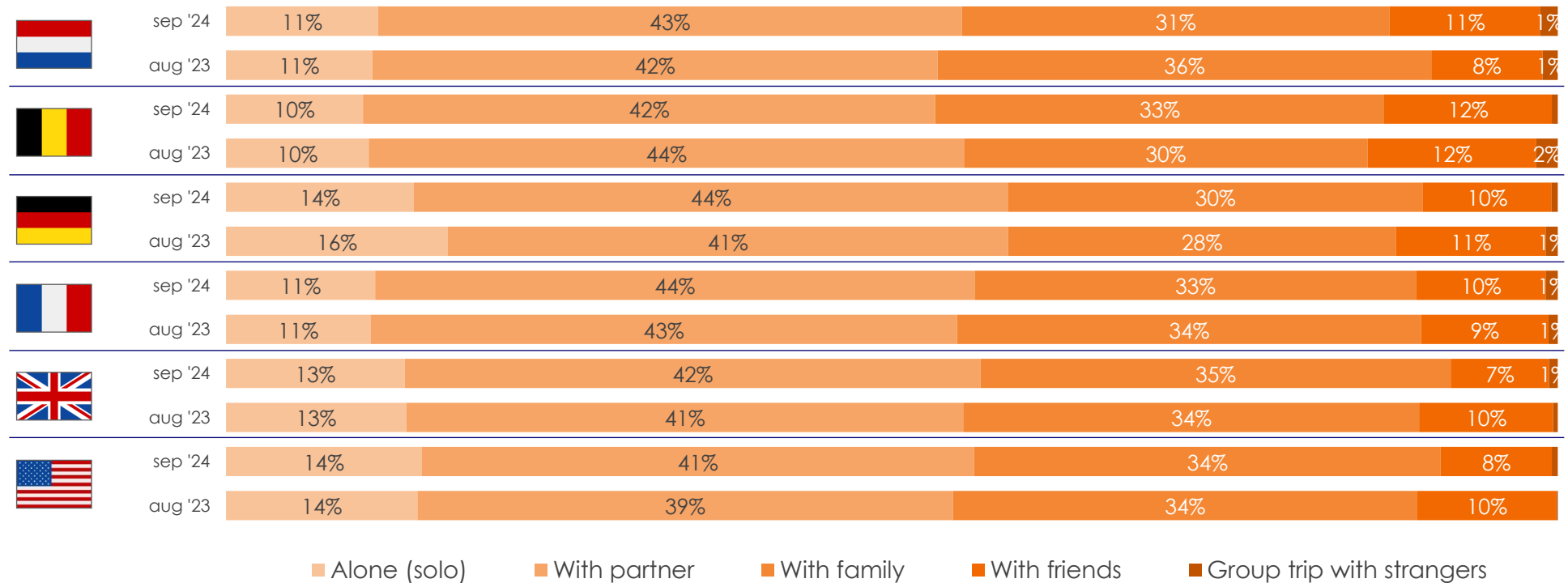
■ Car 
 ■ Aeroplane 
 ■ Train 
 ■ Boat 
 ■ Campervan 
 ■ Coach 
 ■ Bicycle/Moped/Scooter 
 ■ Motorbike 
 ■ Other 
 ■ Don't know

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

Questionnaire: By what means of transport are you considering going to your next holiday destination in Europe? (excl. own country)



On average, the largest group goes on holiday with their partner (43% on average), followed by a holiday with immediate family/other relatives (33% on average). Furthermore, on average, 12% have plans for a solo trip and 10% for a holiday/tour with one or more friends. Among Dutch people, their next holiday is now somewhat more often undertaken with friends and slightly less with immediate family/other relatives (compared to August 2023).









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

Q&A: With which travel company do you plan to take your next holiday?

A hotel/guesthouse is the most popular type of accommodation (average 50%). This is followed by an apartment (average 12%) and renting accommodation from a private person (average 9%). Renting from private individuals is most popular among the French. Among the Dutch, a bungalow (park) and camping score relatively highly.



						
Hotel/guesthouse	45%	48%	57%	37%	51%	61%
Bed and breakfast	4%	7%	3%	7%	7%	4%
Apartment	15%	13%	21%	13%	9%	3%
Bungalow(park)	11%	5%	2%	3%	1%	0%
Campsite	7%	5%	3%	7%	2%	3%
Group accommodation	1%	0%	1%	1%	1%	1%
With a private individual (e.g. Airbnb)	5%	7%	5%	15%	11%	11%
Boat	1%	2%	1%	1%	3%	4%
Second home / permanent (camping) pitch	1%	2%	1%	2%	2%	0%
Residence family/friends/relatives	4%	7%	4%	9%	7%	8%
Otherwise	1%	1%	2%	1%	2%	2%

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

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

In all four types of travel party, hotel/guesthouse and apartment appear in the top 3 accommodation types. However, families do stay in a hotel/guesthouse to a lesser extent than the other travel groups. In contrast, families choose a bungalow (park) relatively more often. Booking accommodation with a private person (e.g. Airbnb) is done relatively often for a holiday with friends. Solo travellers quite often choose a house owned by family/friends/acquaintances as holiday accommodation.









	Alone (solo)	With partner	With family	With friends
Hotel/guesthouse	44%	49%	38%	47%
Bed and breakfast	8%	5%	3%	3%
Apartment	16%	16%	15%	17%
Bungalow(park)	3%	8%	18%	8%
Campsite	3%	7%	9%	3%
Group accommodation	0%	1%	1%	2%
With a private individual (e.g. Airbnb)	3%	5%	5%	12%
Boat	0%	1%	1%	0%
Second home / permanent (camping) pitch	2%	1%	2%	1%
Residence family/friends/relatives	17%	3%	3%	4%
Otherwise	2%	2%	1%	0%

Base: People with holiday plans for the next 12 months (booked or yet to book)  
Highlight: 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 (23% on average). This is followed by a holiday with friends/family/acquaintances (average 12%), a city break (average 11%) and a nature holiday (average 10%). For the Dutch and Germans, a touring holiday is also in the top five, and for Americans, a cruise.









						
Winter sports holiday	2%	1%	2%	3%	1%	1%
Beach holiday	21%	21%	31%	21%	25%	17%
Water sports holiday	1%	1%	1%	1%	0%	1%
Walking holiday	4%	4%	4%	2%	2%	2%
Cycling holiday	3%	2%	1%	1%	0%	1%
Other type of active holiday	2%	2%	2%	2%	3%	4%
Tour	8%	5%	5%	3%	4%	3%
Cruise	2%	2%	3%	1%	5%	8%
Visiting event	3%	3%	2%	3%	3%	6%
City break	11%	11%	12%	10%	14%	10%
Cultural holidays	5%	7%	5%	16%	6%	6%
Visiting friends/family/etc	5%	6%	6%	8%	9%	14%
Nature holiday	10%	12%	14%	12%	5%	6%
Wellness holidays	2%	2%	4%	1%	2%	3%
Holidays with friends/family/etc	15%	15%	2%	12%	15%	14%
Culinary holidays	2%	2%	2%	2%	1%	1%
Shopping holiday (shopping)	1%	1%	1%	1%	1%	2%
Volunteer	0%	0%	0%	0%	0%	1%
Otherwise	4%	3%	3%	2%	4%	4%

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

Q: How would you characterise your next holiday?

On average, flexible cancellation conditions matter most when choosing a holiday destination (on average 74% find this (very) important). A year ago, this average was 71%. This is followed by staying in a quiet place (average 66%). A year ago, this average was 62%. A destination close to home is considered important by 29% on average; among French and British this has dropped significantly compared to a year ago.



						
Flexible cancellation conditions	66% (62%) ↑	74% (71%)	79% (74%) ↑	82% (75%) ↑	65% (70%) ↓	78% (72%) ↑
Destination close to home	27% (26%)	30% (33%)	39% (39%)	29% (36%) ↓	23% (27%) ↓	29% (30%)
Stay in quiet place	68% (67%)	76% (73%)	69% (72%)	76% (80%) ↓	53% (54%)	57% (58%)

Base: People with holiday plans for the next 12 months (booked or have yet to book).  
 Percentage: top 2 (very important + important).  
 Arrow: significantly higher or lower than a year ago.

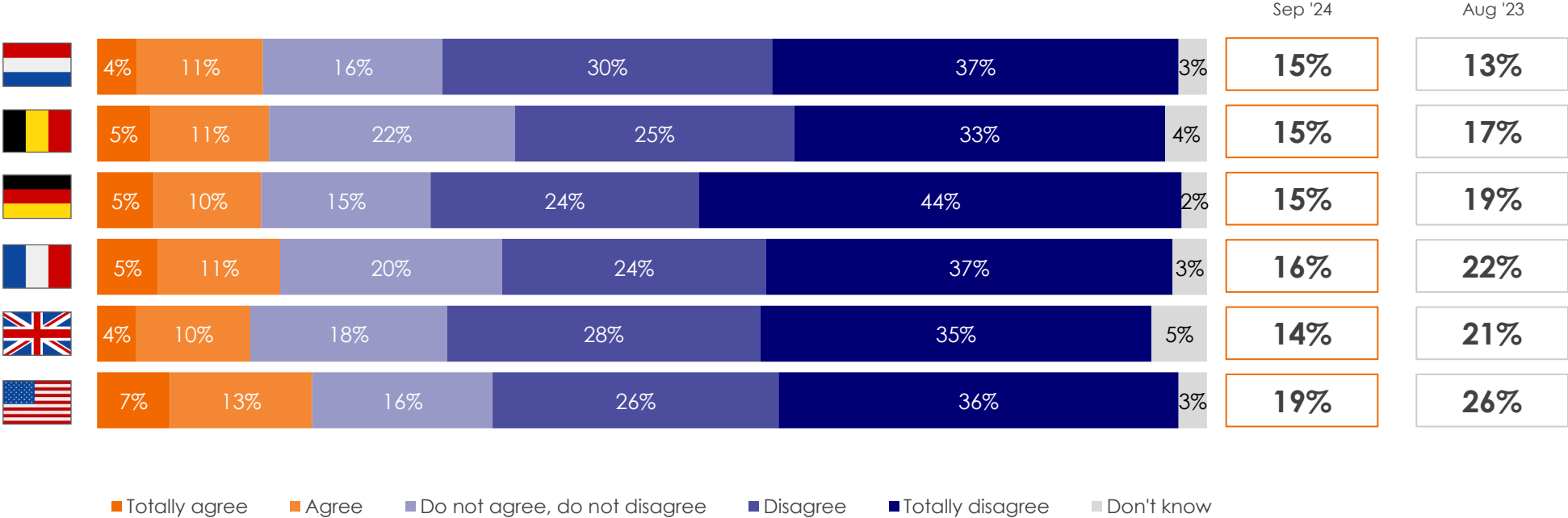
Question: How important are these aspects to you in your holiday destination choice?

On average, 16% expect corona to influence their choice of holiday destination this year. A year ago, this average was 20%. About 1 in 5 Americans agree with this statement. In the other five countries, it is about 15%.



I expect corona to influence my choice of holiday destination this year

Top 2



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

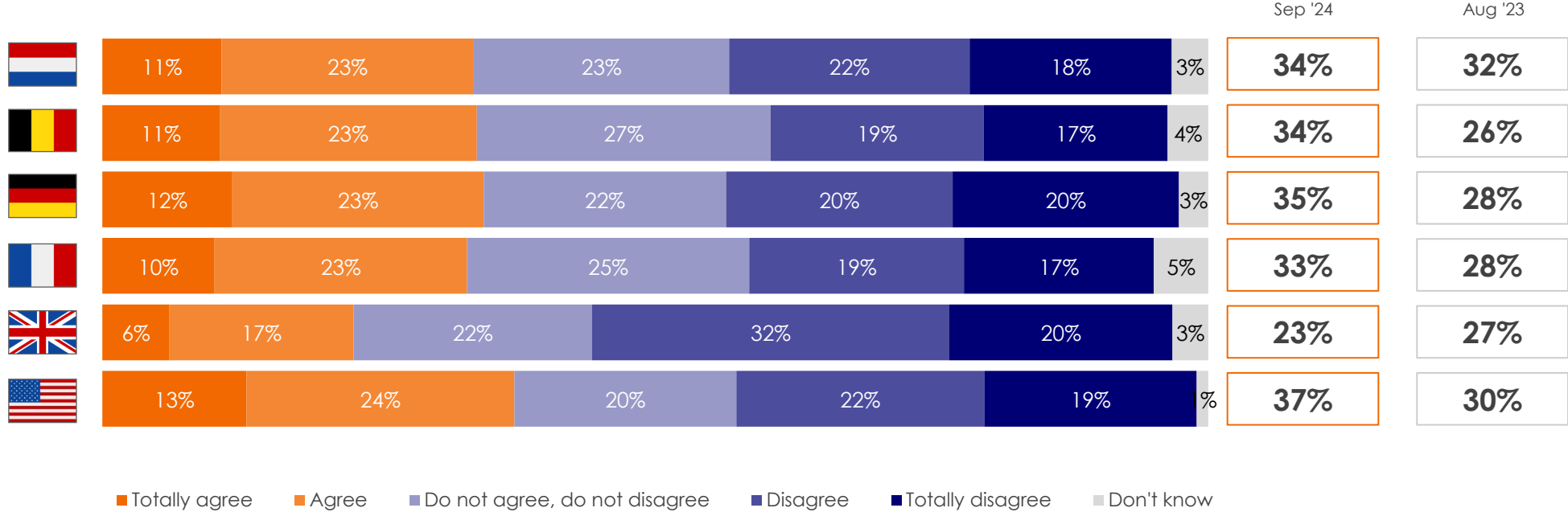


On average, 33% are looking at alternative travel options for their holidays because of possible crowding at airports. A year ago, this was 28%. Britons least agree with this statement (23%).



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

Top 2



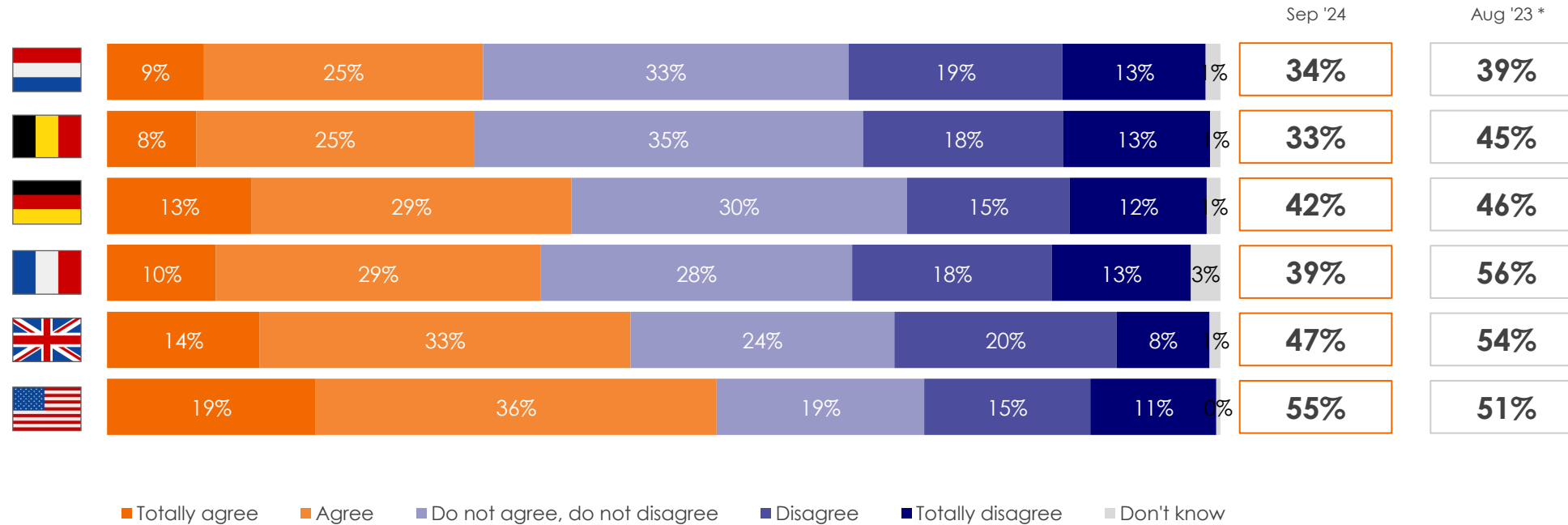
Base: everyone (entire sample)  
 Rounding differences may occur at the top 2%.



On average, 41% of those surveyed (fully) agreed with the statement 'I take the environment into account when booking my holiday'. At the end of August 2023, the average was 48%, but then the statement read 'I think it is important to consider the environment when booking my holiday'. This seems to indicate a difference between what people think is important and what they actually do.

I take the environment into account when booking my holiday (e.g. means of transport, destination, accommodation)

Top 2



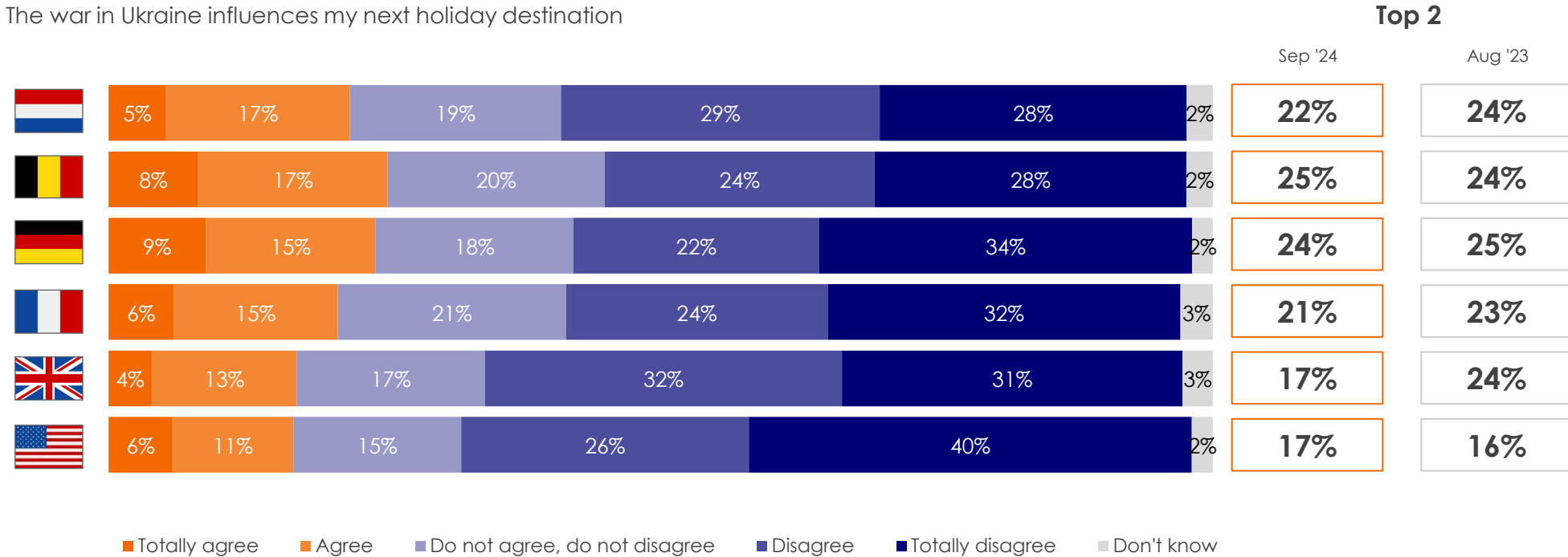
Base: everyone (entire sample)  
Rounding differences may occur at the top 2%.

\* Please note that the statement has changed slightly since June 2024. Previously, the statement read: I think it is important to consider the environment when booking my holiday.

21% of those surveyed say the war in Ukraine affects their choice of holiday destination. A year ago, this was similar at 23%. Britons and Americans are currently the least likely to agree with this statement.



The war in Ukraine influences my next holiday destination



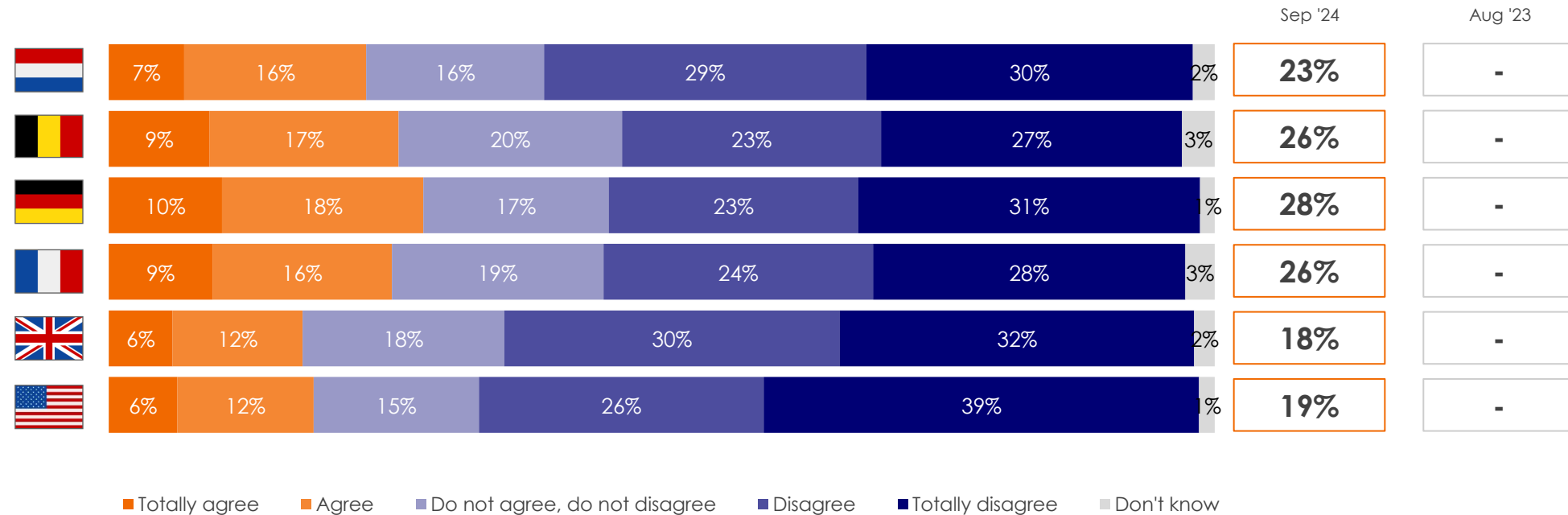
Base: everyone (entire sample)  
Rounding differences may occur at the top 2%.



On average, 23% of those surveyed said that the conflict in Israel and the Palestinian territories affects their choice of holiday destination. For this statement, no comparison can be made with a year ago. However, it is possible to look at the June 2024 measurement, when the average was 21%.

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

Top 2



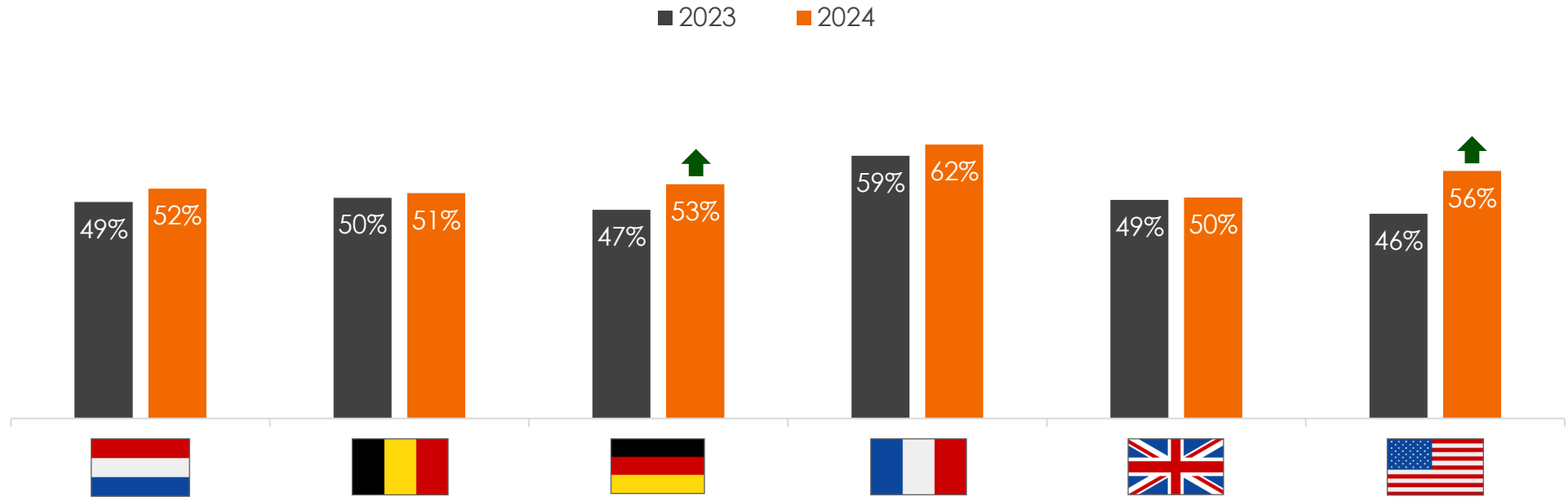
Base: everyone (entire sample)  
Rounding differences may occur at the top 2%.



## 2. Extreme weather

Including some insights regarding this summer.

On average 54% of respondents went on holiday this summer (July, August). A year ago, the average was 50%. Like last year, the French mainly went on summer holidays in July and August. Among Germans and Americans, the proportion who went on summer holidays (in July/Aug) increased compared to last year.

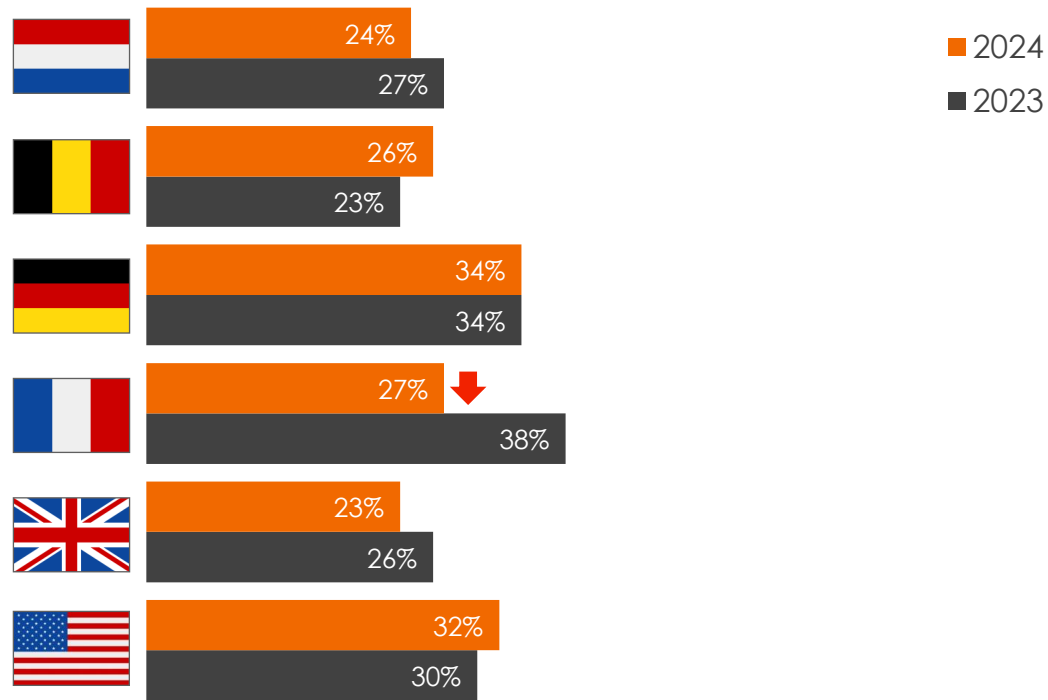


Base: everyone (entire sample)  
Arrow: significant difference compared to a year ago

Q: Did you go on holiday this summer (July, August 2024) (yes/no)?  
Note: in 2023, it was obviously July, August 2023.



Of people who went on holiday this summer (July/August), an average of 28% said they experienced extreme weather conditions (such as a heat wave, forest fire or extreme rainfall) during that holiday. A year ago, the average was 30%. Among the French, this is a significantly lower score than last year.



Base: People who went on holiday this summer (July/August)  
Percentage: Yes (experienced extreme weather)  
Arrow: significant difference compared to a year ago

Questionnaire: Did you experience extreme weather conditions (e.g. heat wave, forest fire or extreme rainfall) during your holiday this summer? (yes/no)





Dutch people who experienced extreme weather conditions on holiday this summer (July, August) experienced it most in Spain. This was followed by Italy, the Netherlands and France.



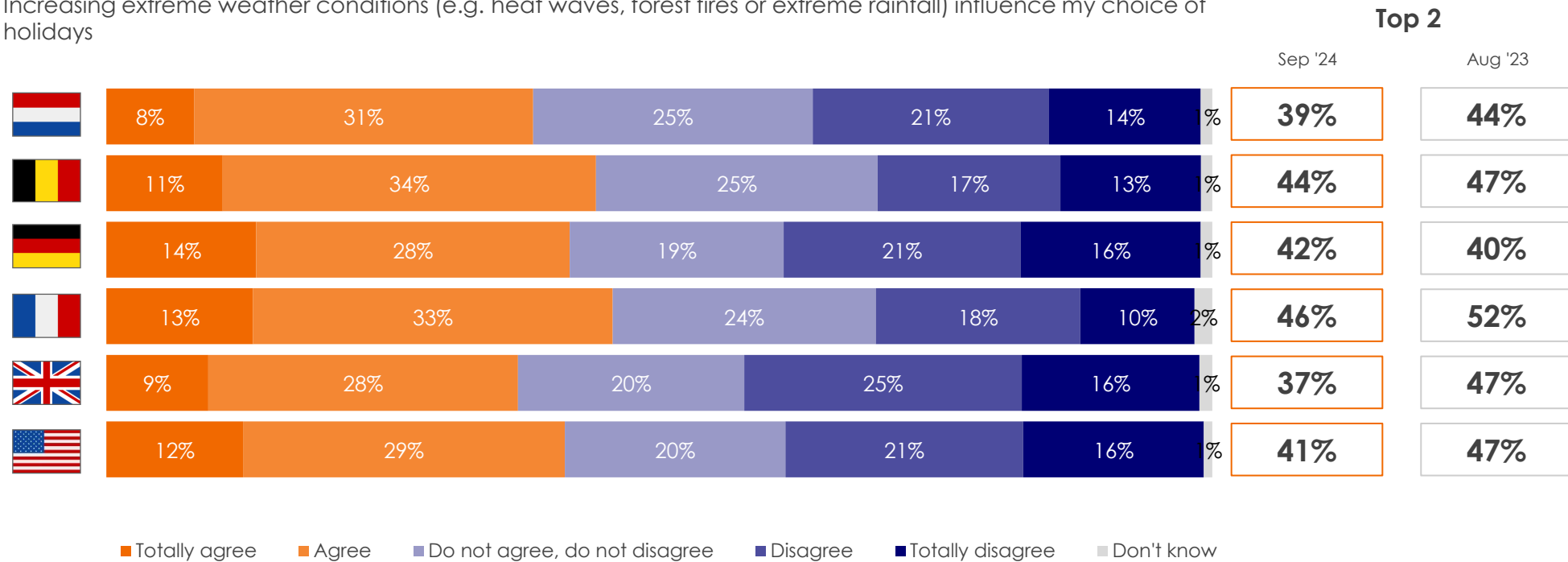
N=120





On average, 42% of those surveyed (fully) agree with the statement that increasing extreme weather conditions influence holiday choices. A year ago, this was 46% on average. French people are still the most in agreement with this, and British and Dutch people currently the least.

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



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



Dutch people who experienced extreme weather on holiday this summer (July/August) largely agree with the statement that increasing extreme weather conditions influence holiday choices (53% (fully) agree). Of the Dutch who did not experience extreme weather on holiday themselves this summer, 35% agree with the statement.

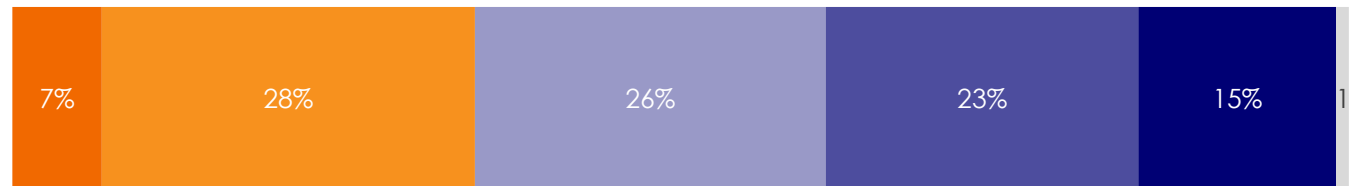


Increasing extreme weather conditions (e.g. heat waves, forest fires or extreme rainfall) influence my choice of holidays

People who experienced extreme weather during their holiday this summer



People who did not experience extreme weather during their holiday this summer



Top 2

Sep '24

53%







35%

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

Base: People who went on holiday this summer (July/August 2024).  
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 (52% on average). This is followed by adjusting the destination (mean 40%). Among the Dutch, Germans and British, these two options are very close to each other in terms of scores. Brits and Americans pay a lot of attention to conditions and insurance when booking a holiday, due to chances of extreme weather.

						
I change my destination	46%	40%	55%	29%	39%	35%
I change my holiday period	50%	55%	54%	64%	43%	44%
I book more last-minute	21%	19%	16%	16%	16%	18%
I pay extra attention to conditions and insurance	20%	15%	25%	20%	37%	40%
Other, namely	2%	1%	0%	1%	2%	3%

Base: people who agree with the statement that increasing extreme weather conditions influence holiday choices.  
Highlight: highest score per country.

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



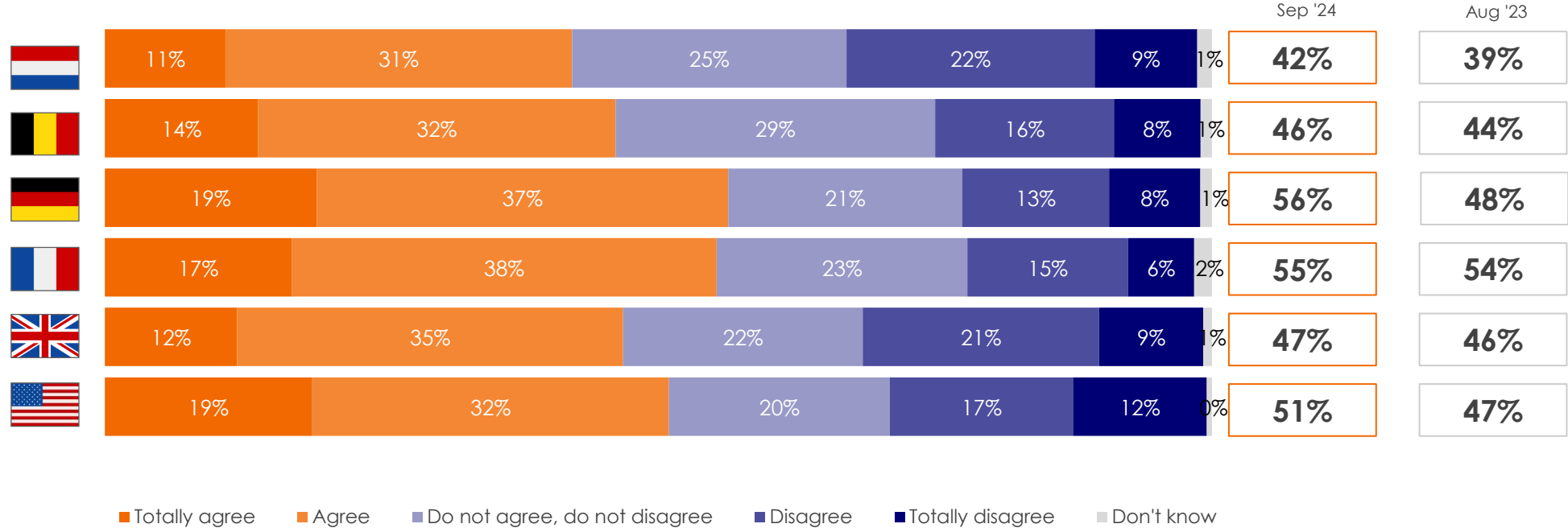
# 3. Influence of prices on holiday plans

On average 50% of all respondents said they are forced to adjust their holiday behaviour as a result of rising prices. A year ago, this was 46% on average. Currently, the top 2 score ranges from 42% among Dutch people to 56% among Germans.



Rising prices are forcing me to change my holiday behaviour







Top 2



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

In September 2024, people said that if they change their holiday behaviour (because of high prices), they do so mainly by going on holiday less often (49% on average). A year ago, this was 46% on average. Dutch and Americans are now more likely to choose to go on holiday for shorter periods or less often than a year ago. For Germans, the saving measure 'going for cheaper accommodation/lodging' is chosen most often.



						
Shorter holidays	30% (22%)	31% (29%)	33% (27%)	35% (31%)	30% (26%)	43% (33%)
Less frequent holidays	49% (41%)	47% (51%)	48% (48%)	46% (39%)	53% (50%)	51% (46%)
Cheaper accommodation/ lodging	43% (41%)	40% (39%)	49% (43%)	44% (41%)	41% (44%)	44% (40%)
Cheaper transport	18% (16%)	19% (16%)	13% (19%)	19% (21%)	18% (21%)	25% (22%)
Save at destination itself	33% (32%)	27% (28%)	31% (31%)	33% (34%)	29% (31%)	34% (31%)
Avoiding the high season	22% (22%)	25% (26%)	25% (26%)	26% (24%)	28% (29%)	26% (28%)
Other, namely	2% (5%)	2% (4%)	1% (1%)	1% (3%)	1% (2%)	1% (3%)

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: scores from a year ago.

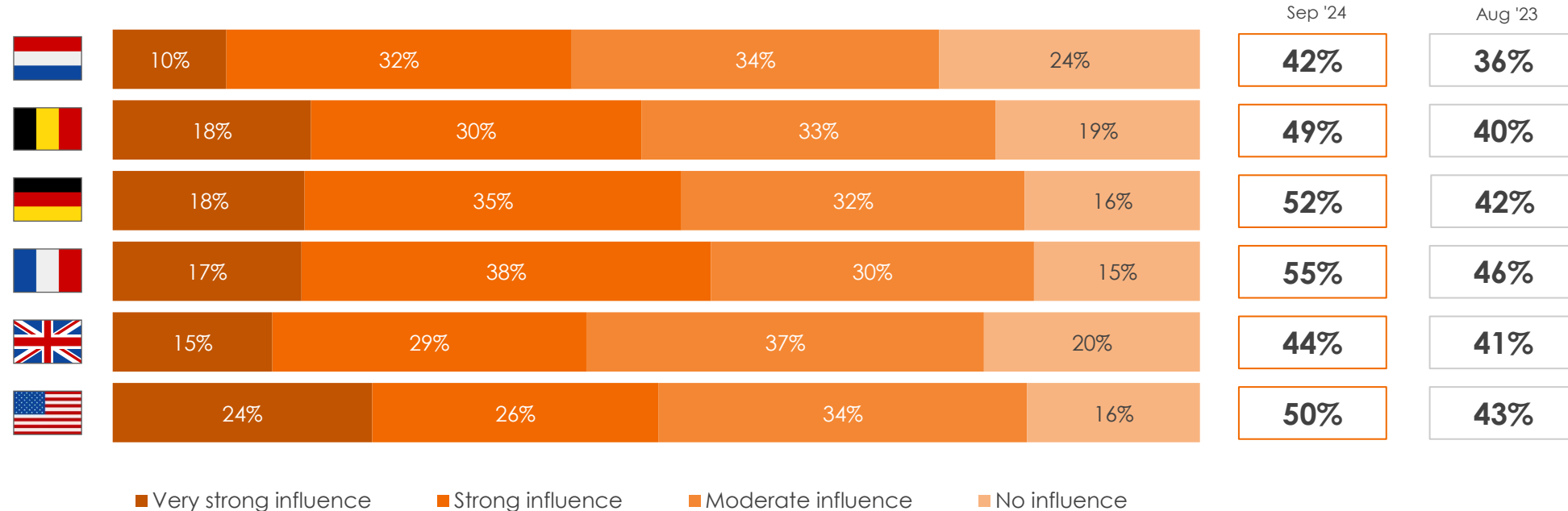
Questionnaire: In what ways do you mainly adjust your holiday behaviour as a result of rising prices? Multiple answers possible (max. 3).

Of those who have holiday intentions but have not yet booked, 49% on average say that rising/high prices have a (very) big influence on this. A year ago, this was 41% on average. Almost all six countries show a clear increase compared to a year ago. Note: Previously, this question mentioned examples such as fuel, gas/energy, groceries, this has now been omitted.



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

Top 2



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

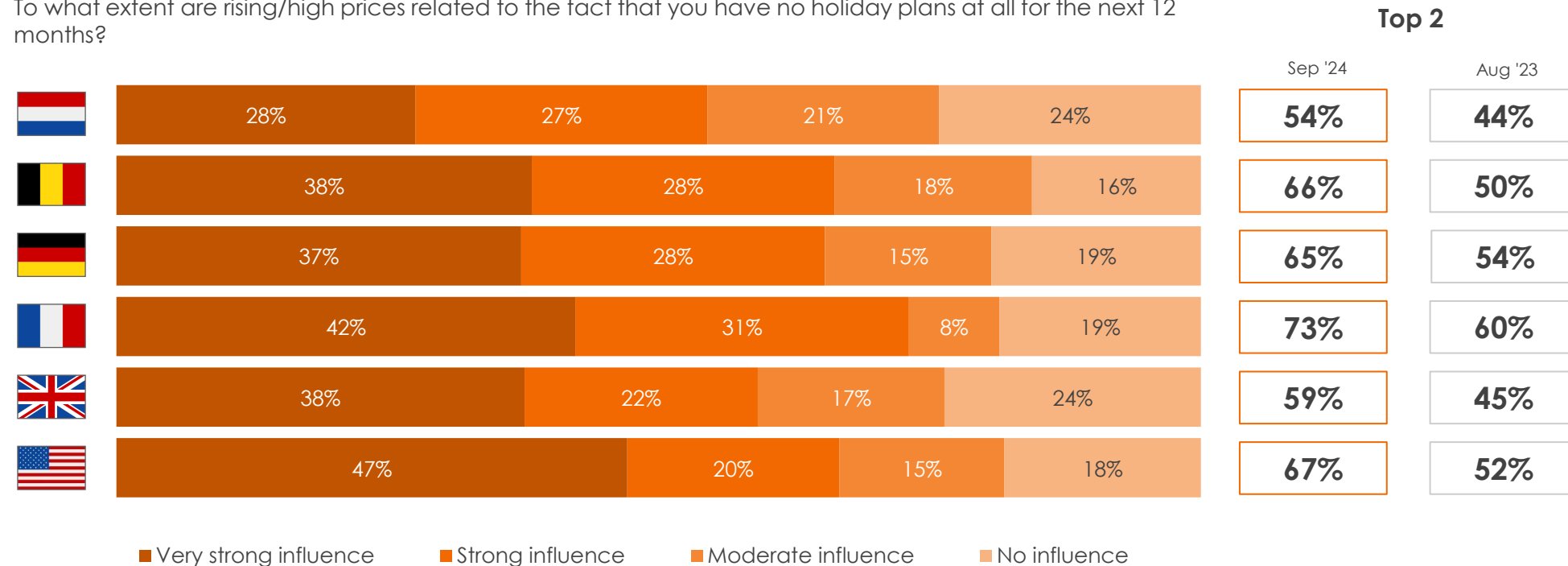
Question: to what extent do rising prices have to do with the fact that you have not yet booked a holiday?  
 Note: A year ago, the examples of rising prices in this statement included fuel, gas/energy, groceries, etc. This was omitted in September 2024.





On average, 65% of people without holiday plans say that rising/high prices play a (very) big role in this. A year ago, this was a lower percentage, at 51%. Currently, top 2 scores range from 54% among Dutch people to 73% among French people. Note: Previously, this question mentioned examples (of higher prices) such as fuel, gas/energy, groceries, this has now been omitted.

To what extent are rising/high prices related to the fact that you have no holiday plans at all for the next 12 months?



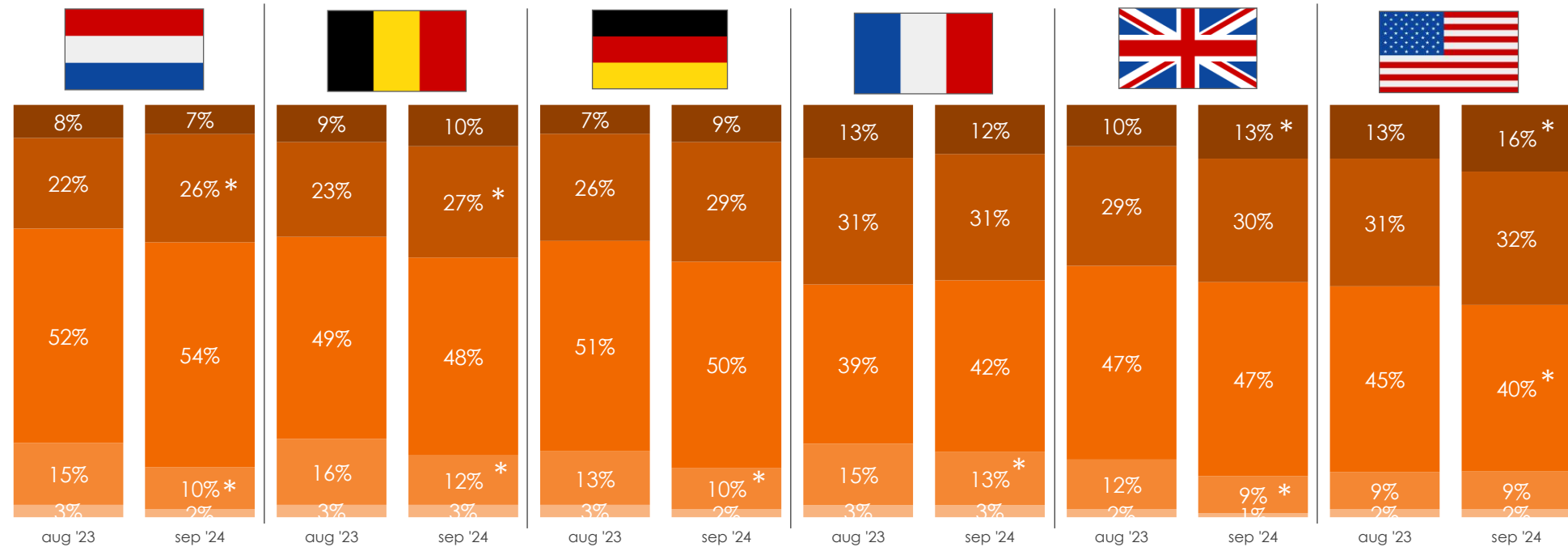
Base: People who currently have no holiday intention in the next 12 months  
Rounding differences may occur at the top 2%.

Q: To what extent are rising prices related to the fact that you have no holiday plans at all for the next 12 months?  
Note: A year ago, examples of rising prices in this statement included fuel, gas/energy, groceries, etc. This was omitted in September 2024.

Of those with a holiday intention for the next 12 months, on average 47% say they have a similar holiday budget for their next holiday as in previous years. A year ago, this was also 47%. The 'lower holiday budget' category has fallen in many countries.



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 have yet to book)  
 \*: significant difference.







Q: Which situation is most applicable to you?



# 4. Information sources & AI tools

Websites of travel companies and booking platforms are used most often when choosing a (next) holiday destination (average 53%). This is followed by search engines (average 37%) and tips from friends/family/colleagues (average 31%).



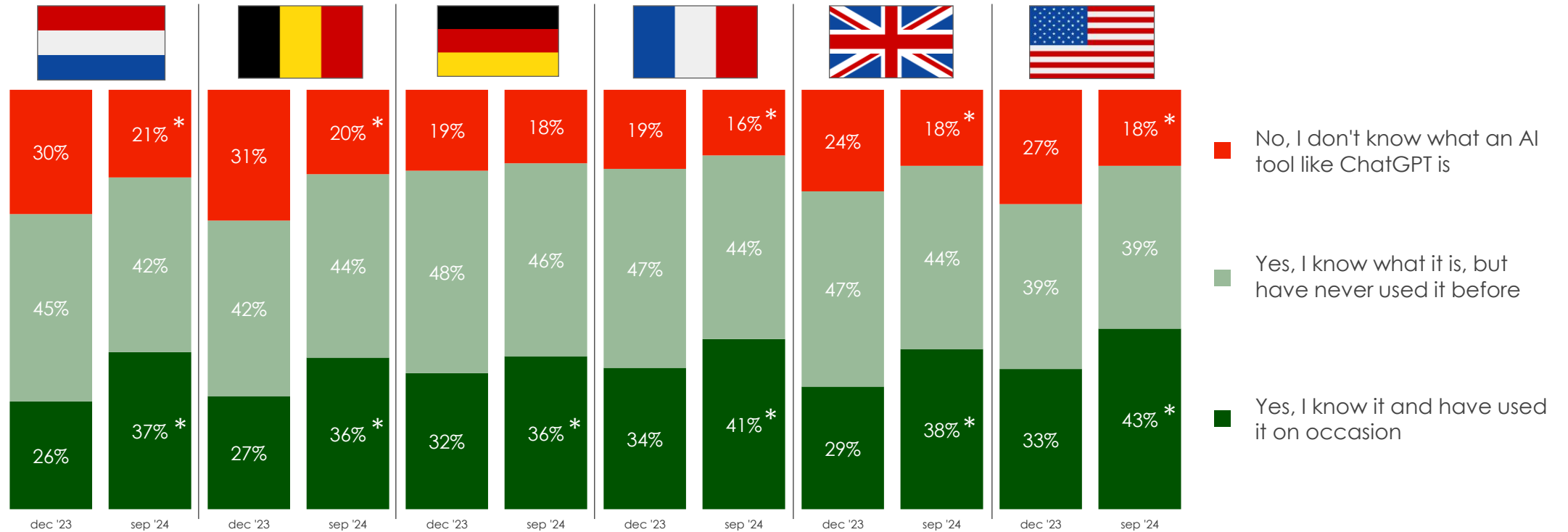
						
AI / ChatGPT	3% (2%)	3% (2%)	3% (4%)	4% (3%)	4% (2%)	7% (6%)
Review websites (e.g. TripAdvisor)	22% (20%)	19% (16%)	21% (21%)	18% (20%)	29% (26%)	30% (23%)
Social media	14% (12%)	12% (9%)	13% (11%)	11% (10%)	17% (17%)	26% (22%)
Search engine	37% (30%)	33% (27%)	35% (32%)	36% (33%)	41% (34%)	42% (37%)
Travel company/booking website	57% (51%)	52% (43%)	57% (49%)	45% (38%)	58% (48%)	48% (29%)
Magazines/newspapers	9% (8%)	8% (6%)	15% (13%)	7% (7%)	14% (12%)	13% (10%)
Friends/family/colleagues	25% (21%)	26% (23%)	33% (27%)	31% (26%)	34% (28%)	39% (33%)
Travel blogs	7% (10%)	6% (10%)	9% (11%)	11% (10%)	13% (16%)	13% (18%)
Travel books/guides	11% (11%)	12% (10%)	10% (9%)	15% (12%)	18% (16%)	17% (15%)
TV travel shows	9% (6%)	5% (4%)	14% (12%)	5% (5%)	14% (12%)	12% (9%)
Discount/auction website	7% (7%)	7% (7%)	7% (8%)	7% (5%)	5% (4%)	7% (4%)
In-person travel agency/tour operator	9% (6%)	15% (14%)	14% (13%)	12% (11%)	14% (10%)	10% (8%)
Social travel website (e.g. Airbnb)	12% (9%)	11% (10%)	12% (11%)	19% (14%)	13% (14%)	18% (15%)
From experience/already known	12% (19%)	11% (14%)	13% (16%)	7% (10%)	12% (20%)	11% (19%)
I do not consult sources	5% (6%)	6% (6%)	5% (5%)	8% (9%)	4% (4%)	5% (7%)
Other, namely...	2% (2%)	2% (1%)	0% (1%)	1% (1%)	1% (1%)	1% (1%)

Base: everyone (entire sample)  
 Highlight: 3 highest scores per country  
 In brackets: the scores from April 2024.

Q: What sources of information do you normally use when choosing your next holiday destination?  
 Multiple answers possible.



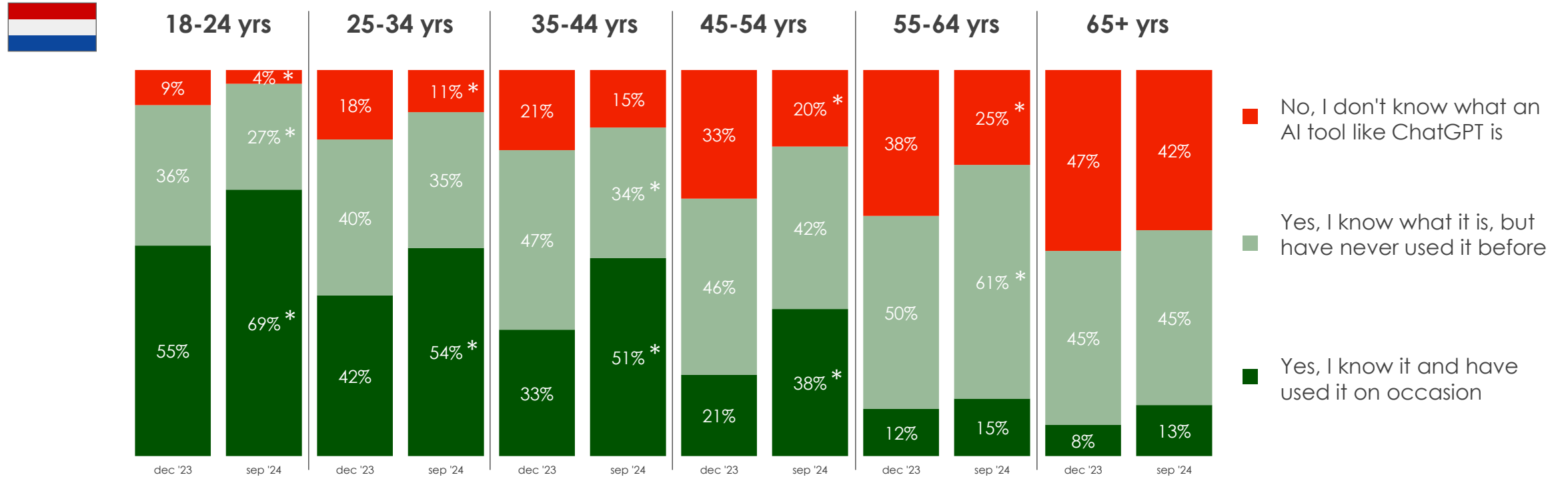
On average, 39% of respondents are familiar with and have used AI tools such as ChatGPT. Last time this was measured, in December 2023, the average was 30%. Awareness of AI has increased significantly over nine months in all six countries. Furthermore, on average 43% know what it is but have never used it and 18% do not know what an AI tool such as ChatGPT is.



Base: everyone (entire sample)  
\*: significant difference.

Q: Are you familiar with AI tools like ChatGPT?

In four of the six age groups, the use of AI tools/ChatGPT has increased compared to nine months ago. Among Dutch people aged 55-64, familiarity with it has increased, but it is not yet widely used. It can be seen below that the younger the age group, the more familiar people are with AI tools like ChatGPT and have also used it to a higher extent.

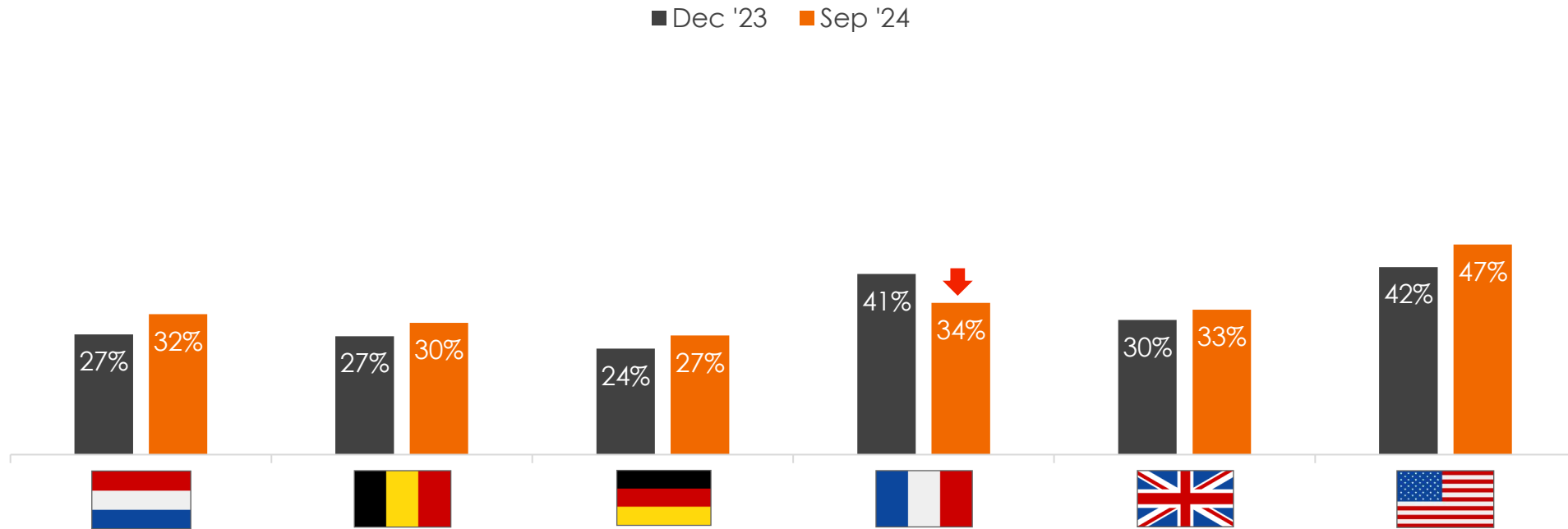


Base: Dutch  
\*: significant difference.

Q: Are you familiar with AI tools like ChatGPT?



Of those who ever use an AI tool such as ChatGPT, an average of 34% use such a tool for holiday inspiration. Nine months ago, the average was 32%. The percentage is again highest among Americans (47%) and lowest among Germans (27%).



Base: people who have ever used an AI tool such as ChatGPT  
Score: the % yes  
Arrow: significant difference.

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





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Element	Description	
<b>Method:</b>	Online	
<b>Target audience:</b>	0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA 2-measurement: NL/BE/DE/UK 3-measurement: NL/BE/DE/FR/UK/USA/CHINA 4-measurement: NL/BE/DE/UK 5-measurement: NL/BE/DE/FR/UK/USA/CHINA 6-measurement: NL/BE/DE/FR/UK/USA/CHINA 7-measurement: NL/BE/DE/FR/UK/USA/CHINA 8-measurement: NL/BE/DE/FR/UK/USA/CHINA 9-measurement: NL/BE/DE/FR/UK/USA/CHINA 10-measurement: NL/BE/DE/FR/UK/USA/CHINA 11-measurement: NL/BE/DE/FR/UK/USA/CHINA	12-measurement: NL/BE/DE/FR/UK/USA 13-measurement: NL/BE/DE/FR/UK/USA 14-measurement: NL/BE/DE/FR/UK/USA 15-measurement: NL/BE/DE/FR/UK/USA 16-measurement: NL/BE/DE/FR/UK/USA (+CHINA APART) 17-measurement: NL/BE/DE/FR/UK/USA 18-measurement: NL/BE/DE/FR/UK/USA 19-measurement: NL/BE/DE/FR/UK/USA/CHINA* 20 measurement: NL/BE/DE/FR/UK/USA 21-measurement: NL/BE/DE/FR/UK/USA
<b>Sample source:</b>	Consumer panel of Dynata (except the 16-measurement in China, which was via WeChat)	
<b>Sample size:</b>	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.	
<b>Fieldwork period:</b>	0 measurement: 21 May to 1 Jun 2020 1 measurement: 17 Jun to 26 Jun 2020 2-measurement: 24 Jul / 28 Jul 2020 3 measurement: 7 Sep to 18 Sep 2020 4-measurement: 27 Oct to 1 Nov 2020 5-measurement: 7 Jan to 13 Jan 2021 6-measurement: 18 Mar to 23 Mar 2021 7-measurement: 19 May to 25 May 2021 8-measurement: 1 Jul to 6 Jul 2021 9-measurement: 1 Sep to 7 Sep 2021 10-measurement: 15 Nov to 21 Nov 2021	11-measurement: 31 Mar to 6 Apr 2022 12-measurement: 13 Jun to 21 Jun 2022 13-measurement: 2 Sep to 8 Sep 2022 14-measurement: 5 Dec to 9 Dec 2022 15-measurement: 9 Mar to 14 Mar 2023 16-measurement: 1 Jun to 7 Jun 2023 17-measurement: 25 Aug to 31 Aug 2023 18-measurement: 1 Dec to 8 Dec 2023 19-measurement: 2 Apr to 8 Apr 2024 20-measurement: 30 May to 5 Jun 2024 21-measurement: 30 Aug to 6 Sep 2024





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