

Holiday Sentiment Monitor

Results 15th measurement

Research objective

The Netherlands Board of Tourism & Conventions (NBTC) started a Holiday Sentiment Monitor in May 2020 to measure holiday intention and the influence of the Corona outbreak on travel behaviour. This year (2023), we will conduct this survey quarterly. This document is a summary of the 15th measurement. In this measurement, current issues such as rising prices (inflation) in relation to holiday intention were also covered.

Research specifications:

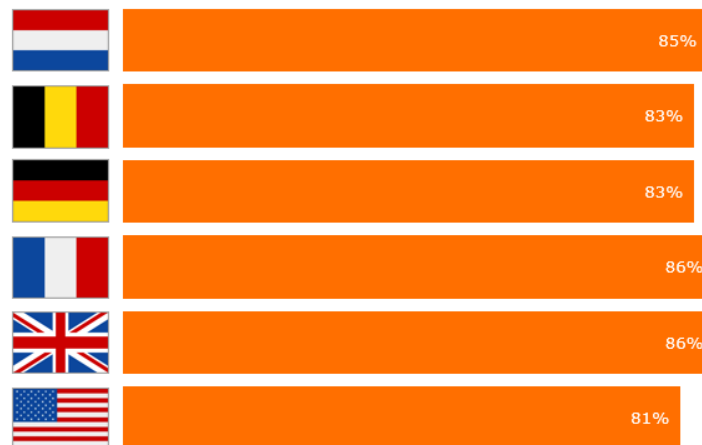
Markets: Netherlands, Belgium, Germany, France, United Kingdom and United States
Target group: 18+, nationally representative
Sample: n=1.000 respondents per country
Fieldwork: 9 March 2023 to 14 March 2023

Want to know more about this monitor? Contact Marlotte Jansen - mjansen@holland.com

Holiday intention

More than 8 in 10 have a holiday intention

On average, 84% of those surveyed intend to go on holiday in the next 12 months. Holiday intention does not differ much between the six countries measured. It ranges from 81% among Americans to 86% among the French and British.

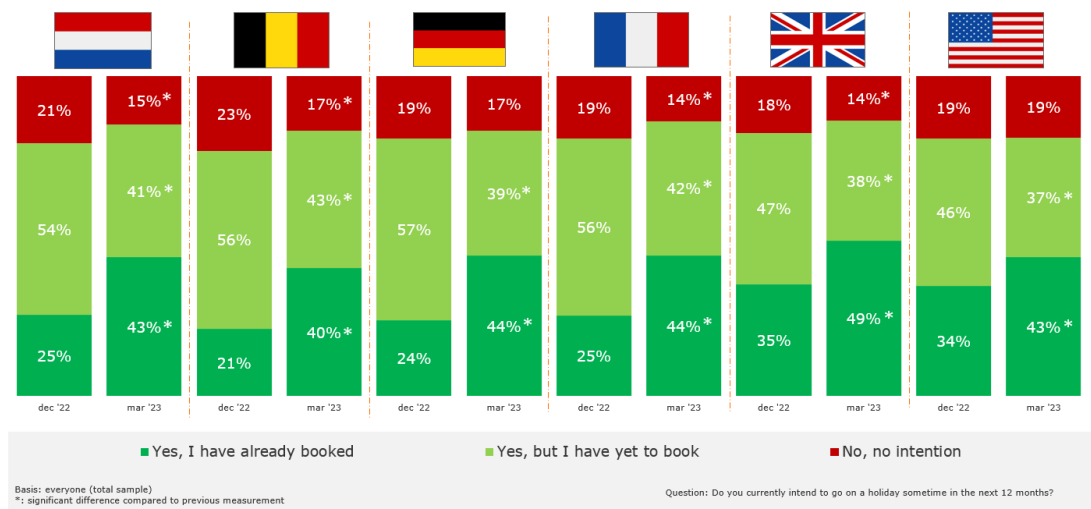


Holiday intention for next 12 months (% top 2):

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

Over 40% have already booked a holiday; mostly for April, May and July

The share that has already booked a holiday has increased significantly compared to the December 2022 measurement. The share that has already booked is highest in the UK (49%) and lowest in Belgium (40%). Of those who have already booked, an average of 18% say they will leave in April and 17% for both May and July. In terms of living status, Dutch people living alone have booked holidays in relatively low numbers. 30% of those living alone even indicate no holiday intention, whereas couples and families have already booked to the highest extent; almost 50%.



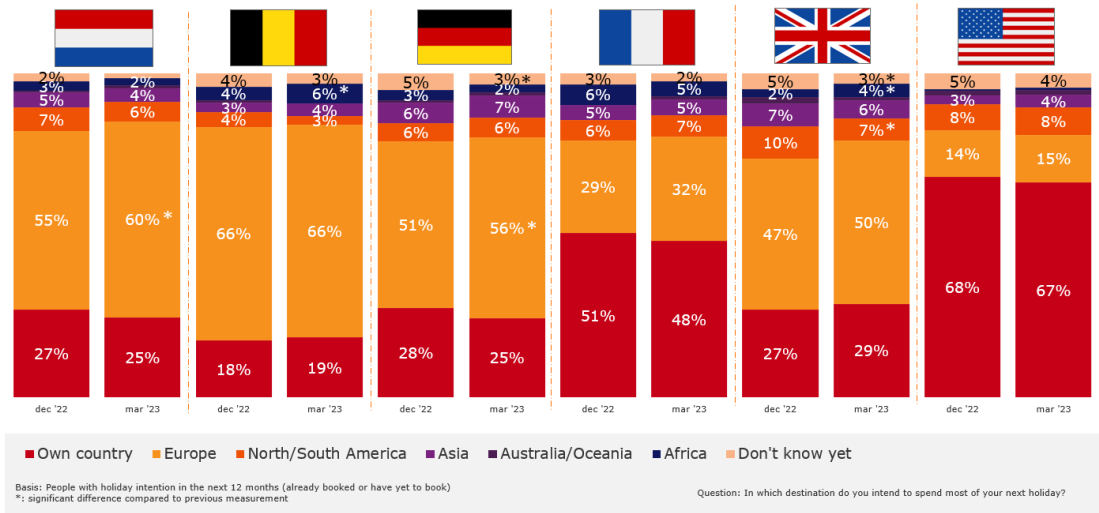
On average, 40% of respondents have yet to book

4 in 10 say they have holiday intentions for the next 12 months but have yet to book. Of that group, over 60% are already looking. They mostly focus on July (average 22%), with June and August in second and third place (18% and 17% respectively). Of the group that is already looking for their holiday, the largest group plans to book within 1 to 3 months (average 38%). In addition, 26% (on average) say they intend to book within 3 to 4 weeks. If people have holiday intentions but are not yet looking, it is mainly because they have not yet had time to do so (average 22%) or their financial situation does not allow it (average 9%).

Holiday destination

Holidays in Europe are popular

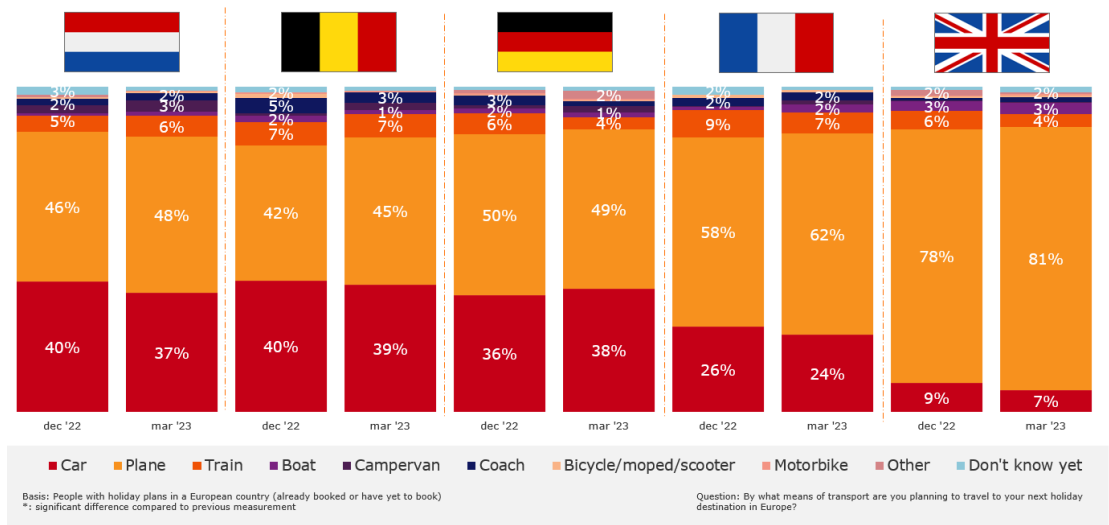
The Dutch, Belgians, Germans and British are largely planning to spend their next holiday abroad in Europe. A high number of French and Americans are planning to take their next holiday in their home country. Of Dutch people with holiday plans, an average of 13% have plans for an intercontinental trip. Looking at who people travel with, Dutch people who travel solo go for an intercontinental trip relatively often. Dutch families opt relatively more for their own country (28%), while groups of friends choose this less often (16%). Dutch groups of friends mostly choose a destination abroad in Europe.



Means of transport

Aeroplane most chosen for European holidays

In all five countries, the plane is the most chosen means of transport for the next holiday in Europe (average 56%). Among the Dutch, Belgians and Germans, the car also scores relatively high.



Type of accommodation

Hotel is most chosen accommodation type

A hotel/guesthouse is the most popular type of accommodation; on average, 45% of respondents with holiday intentions choose this. This is followed by an apartment (average 12%) and in shared third place, renting accommodation from a private person (8%) or a house of family/friends/acquaintances (also 8%). Renting from private individuals is particularly popular among the French. A bungalow (park) and camping score relatively high among the Dutch.

Determining factors

Flexible conditions, a quiet place and rising prices most important

Over 70% of people with holiday intentions consider flexible cancellation conditions (very) important when choosing a holiday destination. They also attach great importance to staying in a quiet place. In third place is rising prices. Inflation and increased prices of e.g. gas/energy and groceries currently play a bigger role in holiday choice than Corona, the situation in Ukraine, sustainability and possible crowding at airports.







Impact of inflation

Half of respondents adjust holiday behaviour due to inflation

Half of people (49% on average) say they are forced to adjust their holiday behaviour due to rising prices. The French are in highest agreement with this statement (56%) and the Dutch the least (38%). Differences can also be seen by type of living status in the Netherlands. Dutch people living alone adjust their holiday behaviour to the highest degree because of inflation (average 43%). Among Dutch couples or people living with their parents, this has less of an impact (both 32%).

Going on holiday less often and cheaper accommodation/stay

People mainly adjust their holiday behaviour (due to rising prices) by going on holiday less often (average 45%) and by choosing cheaper accommodation (average 40%). The least chosen option is saving on transport (average 20%). Zooming in on the type of living status, it can be seen that a large number of Dutch people living alone choose to avoid the high season. Whereas many Dutch families choose to save in the destination itself (e.g. eating out less often).

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|---|---|---|--|---|---|---|
| Shorter holidays | 26% | 28% | 24% | 28% | 30% | 34% |
| Take a holiday less often | 42% | 43% | 48% | 40% | 51% | 44% |
| Cheaper accommodation/ stay | 39% | 40% | 41% | 39% | 40% | 38% |
| Cheaper transport | 16% | 18% | 13% | 25% | 19% | 25% |
| Spend less in the destination itself | 29% | 28% | 29% | 35% | 28% | 29% |
| Avoid the high season | 19% | 27% | 25% | 21% | 26% | 23% |
| Other, namely | 5% | 4% | 2% | 2% | 3% | 3% |

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

Highlighting: the three highest scores of each country are in bold

Question: As a result of rising prices, what are the main things you will change about your holidays?

Multiple answers possible (max. 3).