

# Holiday Sentiment Monitor

Results 19th measurement - April 2024



**NBTC**

Netherlands Board  
of Tourism &  
Conventions

## 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 document is a summary of the 19th measurement. Although the corona pandemic is no longer the main focus, this measurement is used to research current issues such as sustainability, extreme weather conditions, rising prices and how this affects holiday plans. This survey is conducted quarterly. As China was subject to corona measures for an extended period, it was not included in this survey for some time. This nineteenth measurement again includes results from China.

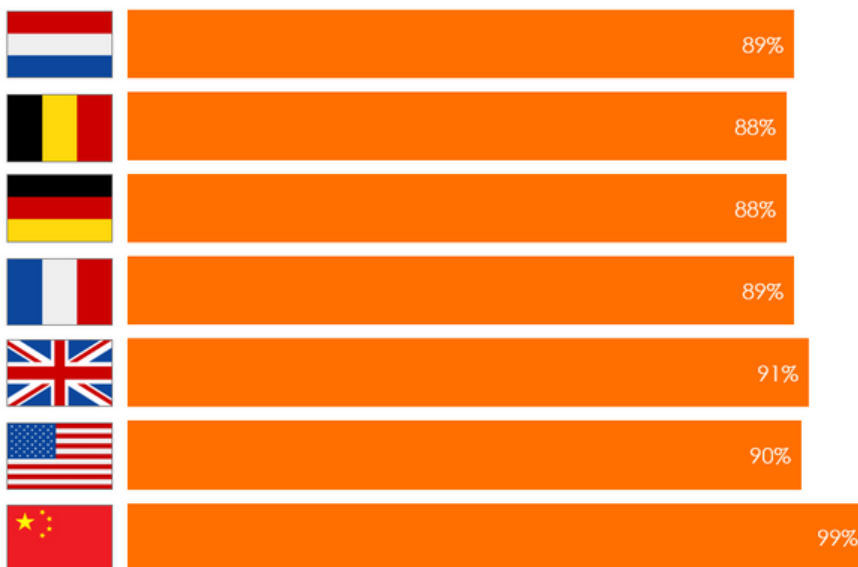
## Research specifications:

Markets:	Netherlands, Belgium, Germany, France, United Kingdom, United States and China
Target group:	18+, nationally representative
Sample:	n=1.000 respondents per country (with a focus on large cities in China)
Fieldwork:	2 to 8 April 2024

Want to know more about this monitor? Contact Marlotte Jansen – [mjansen@holland.com](mailto:mjansen@holland.com)

## 9 in 10 have a holiday intention.

On average, 91% of respondents intend to go on holiday in the next 12 months. This could be a short or long holiday at home or abroad.



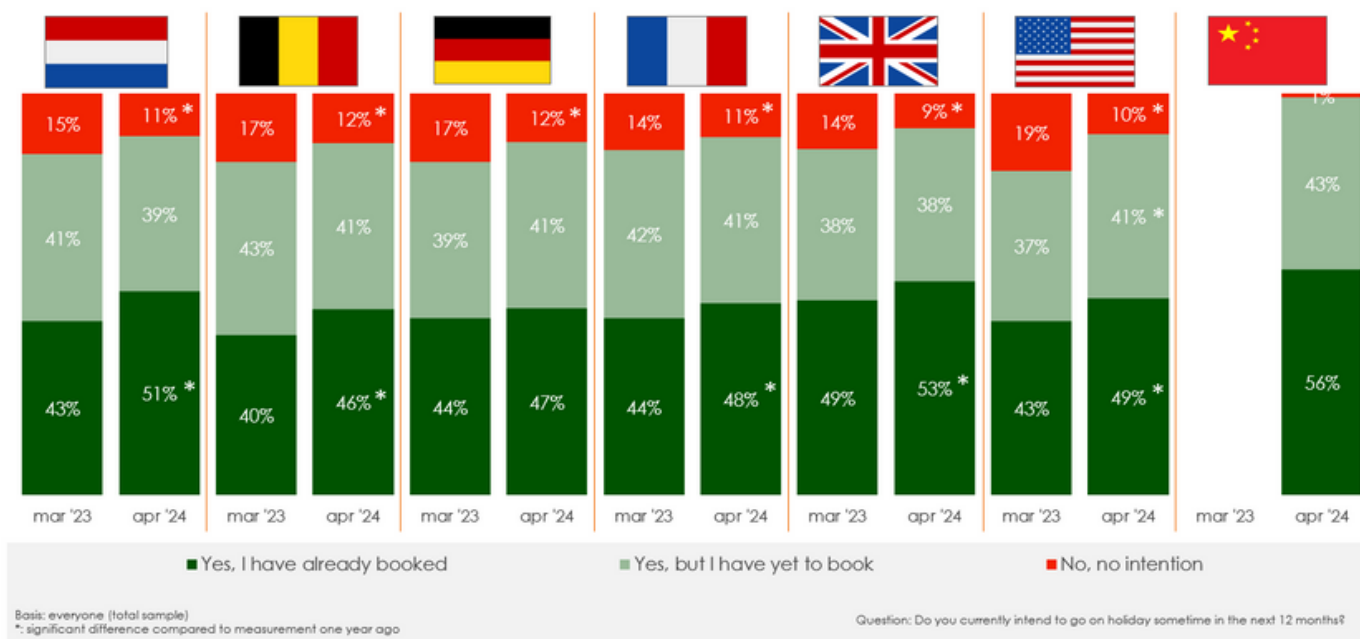
Holiday intention in the next 12 months (% top 2):

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



## 50% have already booked a holiday, many of them leaving in May.

The share that has already booked a holiday is highest among Chinese (56%), British (53%) and Dutch (51%). Among Belgians, it is lowest (46%). Among those who have already booked a holiday, the next holiday is mostly in May (average 22%). This also applies to the Dutch (24%). Amongst the Belgians and French, July is the month when their next holiday mostly occurs.



## Market potential: around 40% of those surveyed have holiday intentions but have yet to book. And of these, around 60% are already looking.

41% of those surveyed say they have a holiday intention in the next 12 months but have yet to book. Of that group, 61% are already looking. They mostly focus on July and August (both 21%). The Dutch also focus relatively often on May. Of this group that is already looking for a holiday, the largest group plans to book within 1 to 3 months (average 39%). In addition, on average 25% say they plan to book within 3-4 weeks and 16% within 1-2 weeks.

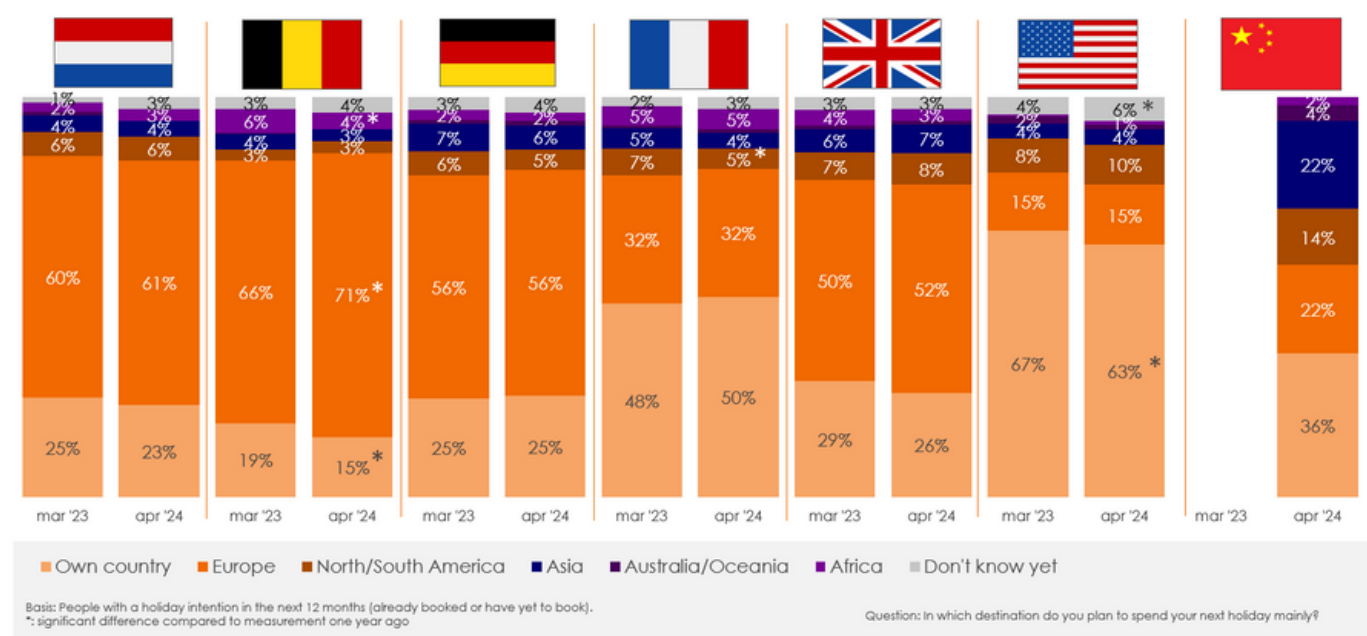


## Next holiday mostly 4-7 nights.

On average, the majority of respondents with a holiday intention are going away for 4-7 nights for their next holiday (41%). After that, the 8-14 nights category is the most frequently chosen (on average 32%). Among the Dutch, however, it is just the opposite; 34% go for 4-7 nights and 37% go for 8-14 nights.

## Most Dutch people go on holiday (elsewhere) in Europe.

Of the Dutch, about a quarter plan to spend their next holiday in their own country, 61% (elsewhere) in Europe and about 13% in other continents. Less Belgians and Americans plan to spend their next holiday in their own country compared to approximately a year ago. Among Belgians, Europe is now more in demand. Among the Chinese, 36% opt for their own country, 22% for other Asian countries and also 22% for Europe.



## Drenthe and Noord-Holland most considered for holidays at home.

Dutch people who want to spend their next holiday in the Netherlands said they would mostly do so in the provinces of Drenthe and Noord-Holland (13% and 11% respectively). This is followed by Limburg, Zeeland, Noord-Brabant and Overijssel (all four 10%). Compared to a year ago, plans for a holiday/weekend break in Limburg and Gelderland have decreased.



## The Netherlands in top 5 European holiday destinations among Belgians and Germans.

Among Belgians, France is still the favourite holiday destination. However, the Netherlands is in the top 5 among Belgians; currently in shared fifth place. Among Germans, the Netherlands is also in shared fifth place for a European holiday in the coming months.

## Sustainability, prices and extreme weather most important.

This measurement shows that sustainability, prices and extreme weather are currently the most considered factors when booking a holiday. 51% of those surveyed think it's important to consider the environment (e.g. transport, destination, accommodation). In addition, 50% say they are forced to adjust their holiday behaviour due to rising prices. Furthermore, 46% say that increasing extreme weather conditions influence their choice of holidays. These three topics are thus more influential than topics such as possible crowding at airports, wars/conflicts in the world and the coronavirus.

## 1 in 5 of the Dutch choose a different destination due to increasing extreme weather conditions.

As a result of increasing extreme weather conditions, people most often adjust the period in which they go on holiday. This is followed by changing the destination. However, among the Dutch, adjusting the destination comes first. Brits and Americans adapt the most by paying extra attention to conditions and insurance when booking a holiday.

## Different sources of information for younger and older age groups.

Among Dutch people, online travel companies / booking websites and search engines appear in the top three most used sources for choosing a holiday destination in all age groups. However, it is noticeable that older age groups draw more on their own experiences than younger age groups. In particular, younger age groups use more social media, social travel websites (e.g. Airbnb) and tips from friends/family/colleagues as sources of information.