

Holiday Sentiment Monitor

Results 18th measurement - January 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 18th 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.

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: 1 to 8 December 2023

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

Holiday intention for 2024 higher than a year ago.

On average, 86% of those surveyed intend to go on holiday in 2024. A year ago, an average of 80% had a holiday intention for 2023. Holiday intention is currently highest among Britons (90%) and lowest among Americans (83%). Among Dutch people, it is 85%.



Holiday intention for 2024 (% top 2):

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

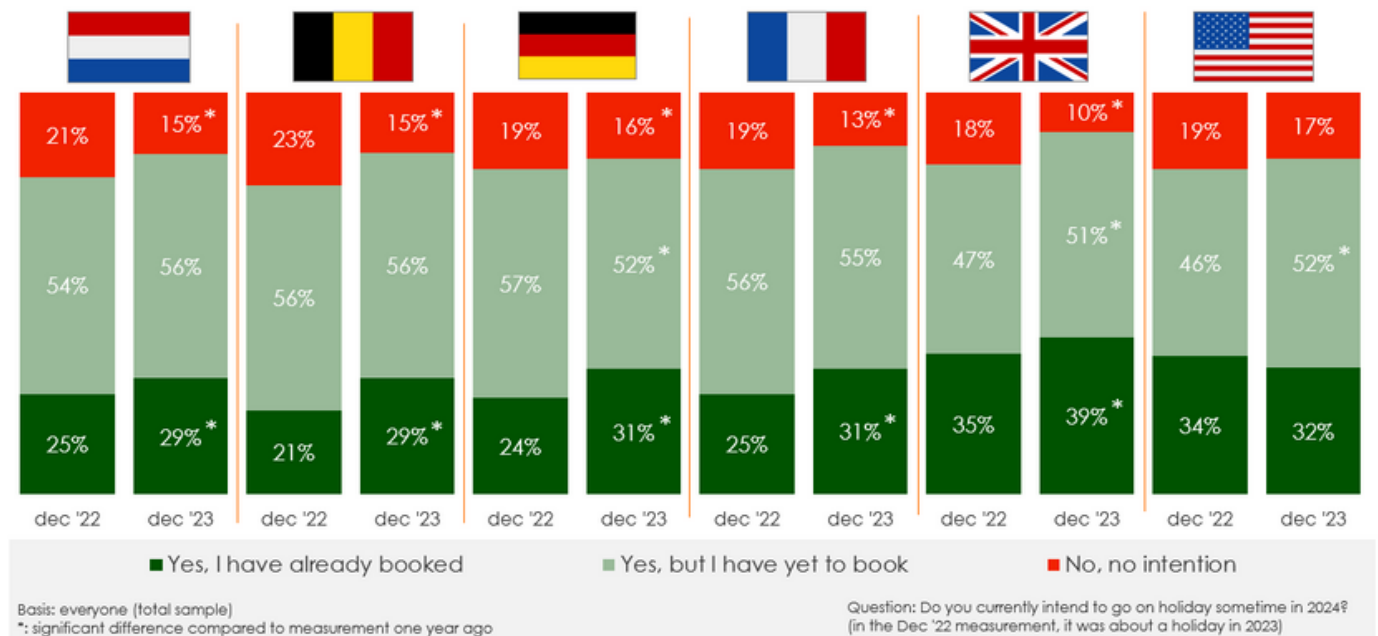


The Dutch expect to take an average of two to three holidays in 2024.

Those surveyed from six countries, who have a holiday intention for 2024, say they intend to take an average of 2.6 holidays. A year ago, this average was the same. The average for 2024 is highest among Americans (3.0) and lowest among Belgians (2.3). Among the Dutch it is (like last year) 2.4.

32% have already booked a holiday, many of them leaving in early 2024.

The share that has already booked a holiday is higher than a year ago (then 27% on average). In the UK, the share that has already booked is the highest (39%) and in the Netherlands and Belgium the lowest (both 29%). It is only amongst the Americans that the share that has already booked has not increased compared to a year ago. Three quarters of those who have already booked say their next holiday will be in the first half of 2024. For instance, 15% indicate that they will go in January, 13% in February and likewise 13% in April.



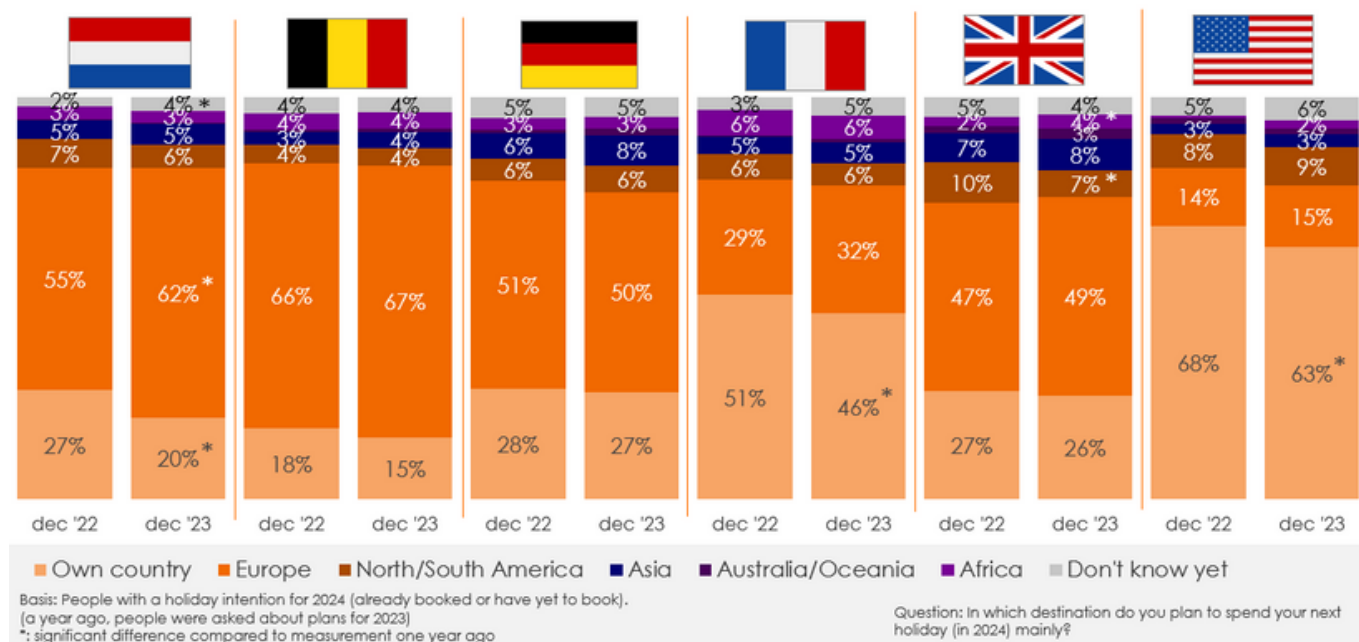
Market potential: over 50% of those surveyed have holiday intentions but have yet to book. And of these, around 60% are already looking.

54% of those surveyed say they have a holiday intention for 2024 but have yet to book. Of that group, about 60% are already looking. They mostly focus on May (average 17%), June (15%) and July (15%). Of this group that is already looking for a holiday, the largest group plans to book within 1 to 3 months (average 42%). If people have holiday intentions but are not yet looking, it is mainly because they have not yet had time to do so (average 26%) or their financial situation does not allow it (average 8%).



Fewer plans to holiday at home.

Compared to 2023, less Dutch respondents plan to spend their next holiday (in 2024) in their own country. This is also true for the French and Americans. Most Dutch and Belgians plan to spend their next holiday (elsewhere) in Europe. Many Dutch people travelling alone (solo) have plans for intercontinental trips (mostly to Asia). Although less than last year, many French and American respondents are planning to holiday in their own country.

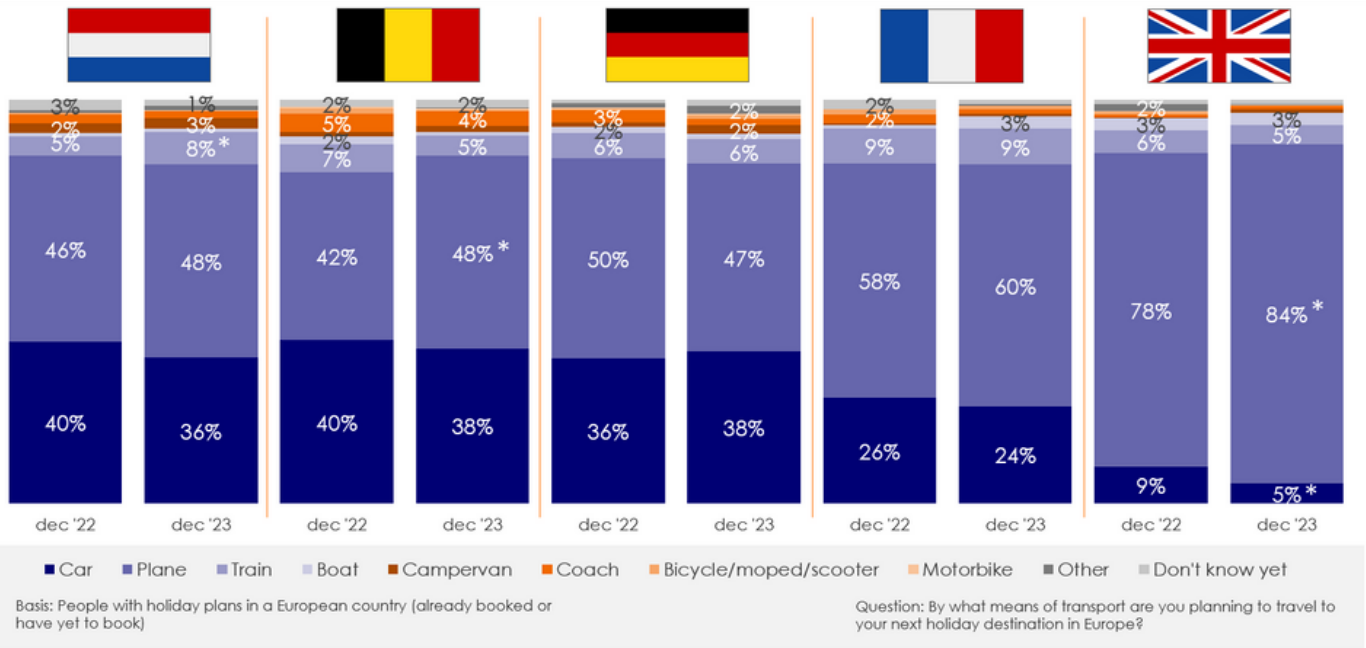


Gelderland and Limburg most considered for holidays at home.

Dutch people who want to spend their next holiday in the Netherlands in 2024 said they would mostly do so in Gelderland and Limburg (both 14%). This is followed by Drenthe (11%). Compared to a year ago, plans for a holiday/weekend break in Noord-Holland have decreased.

Aeroplane again most chosen for European holidays.

The plane is the most chosen means of transport for the next holiday in Europe (average 56%). A year ago this was 53% on average. Among the Dutch, Belgians and Germans, the car also scores relatively high. Furthermore, a relatively high number of French respondents are considering travelling by train. Among the Dutch, this share (train) has increased compared to a year ago (from 5% to 8%).



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. 49% of those surveyed think it's important to consider the environment (e.g. transport, destination, accommodation). In addition, 48% say they are forced to adjust their holiday behaviour due to rising prices. Finally, 39% 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.

On average 30% have used an AI tool such as ChatGPT and of these, 32% have used it for holiday inspiration.

On average, 30% of respondents are familiar with AI tools like ChatGPT and have used them before. On average, 45% know what it is but have never used it and 25% don't know what an AI tool like ChatGPT is. In general, the younger the respondent is, the more familiar they are with it. Of those who do use an AI tool like ChatGPT, an average of 32% use it for holiday inspiration.