

# Holiday Sentiment Monitor

## Results 16<sup>th</sup> 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 are conducting this survey quarterly. This document is a summary of the 16th measurement. In this measurement, current issues such as higher prices (inflation) in relation to holiday intention were covered, and, moreover, additional research was conducted among Chinese respondents. There is more information on the latter at the end of this summary.

#### Research specifications:

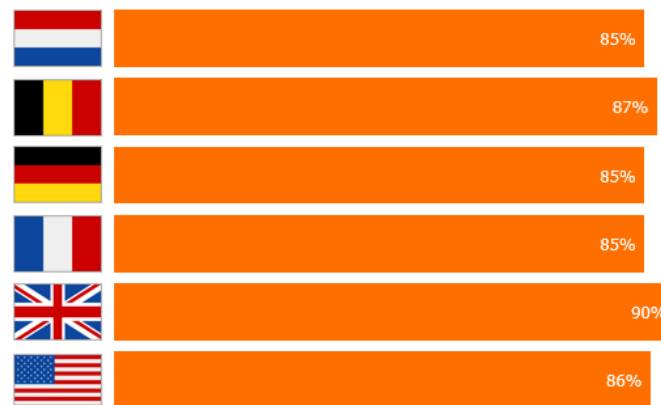
Markets: Netherlands, Belgium, Germany, France, United Kingdom and United States  
 Target group: 18+, nationally representative  
 Sample: n=1.000 respondents per country  
 Fieldwork: 1 June 2023 to 7 June 2023

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

### Holiday intention

#### Almost 9 in 10 have a holiday intention

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%.

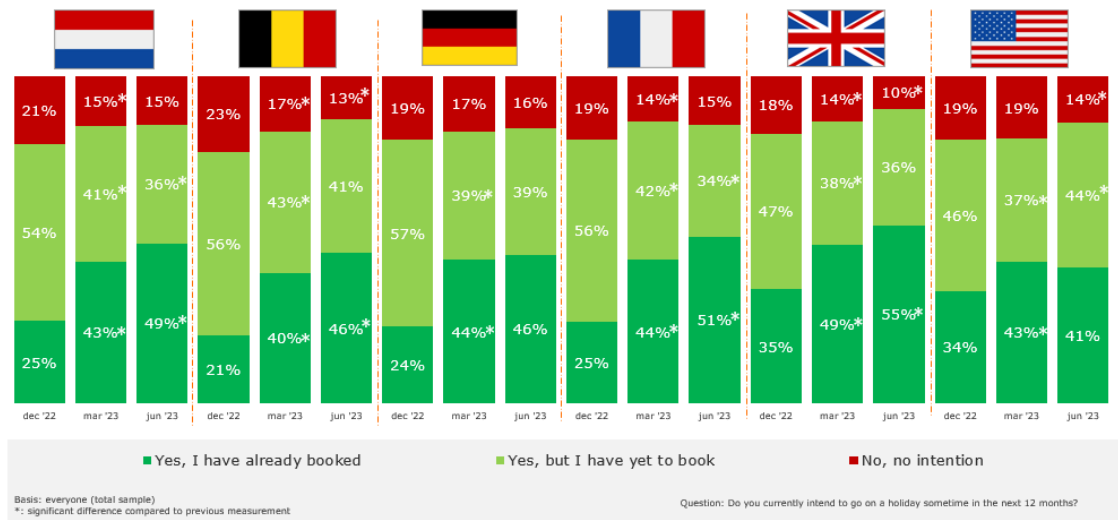


Holiday intention for next 12 months (% top 2):

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

### Almost 50% have already booked a holiday; with many leaving in July

The share that has already booked a holiday has increased even further than the March 2023 measurement, with the highest being 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. In addition, 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.



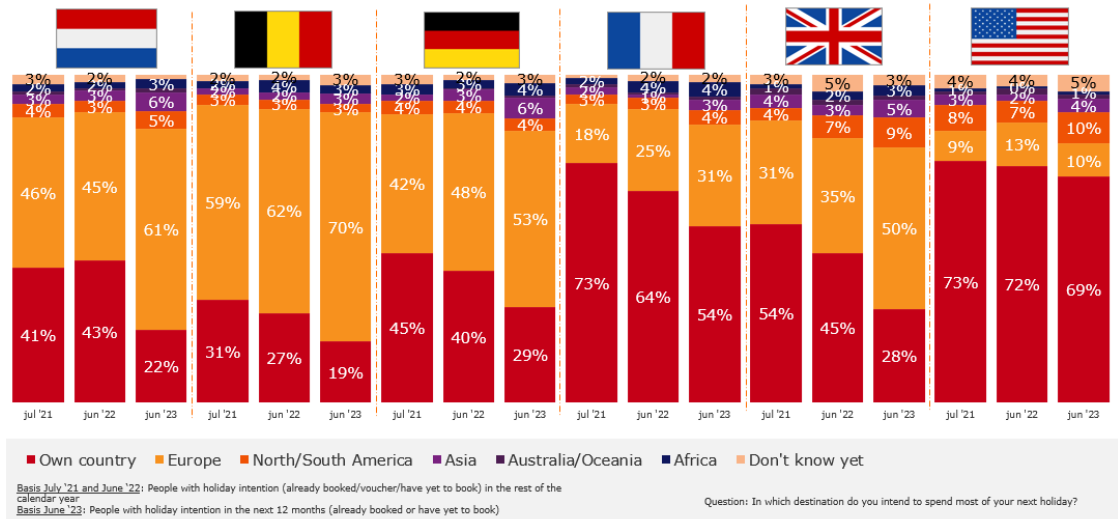
### Around 40% of respondents have yet to book

Some 4 in 10 say they have holiday intentions for the next 12 months but have yet to book. Of that group, 65% are already looking. 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 looking for their holiday, the majority plans to book within 3 to 4 weeks (average 31%). In addition, 28% (on average) say they intend to book within 1 to 3 months. If people have holiday intentions but are not yet looking, 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%).

## Holiday destination

### Fewer holiday plans at home than in previous two summers

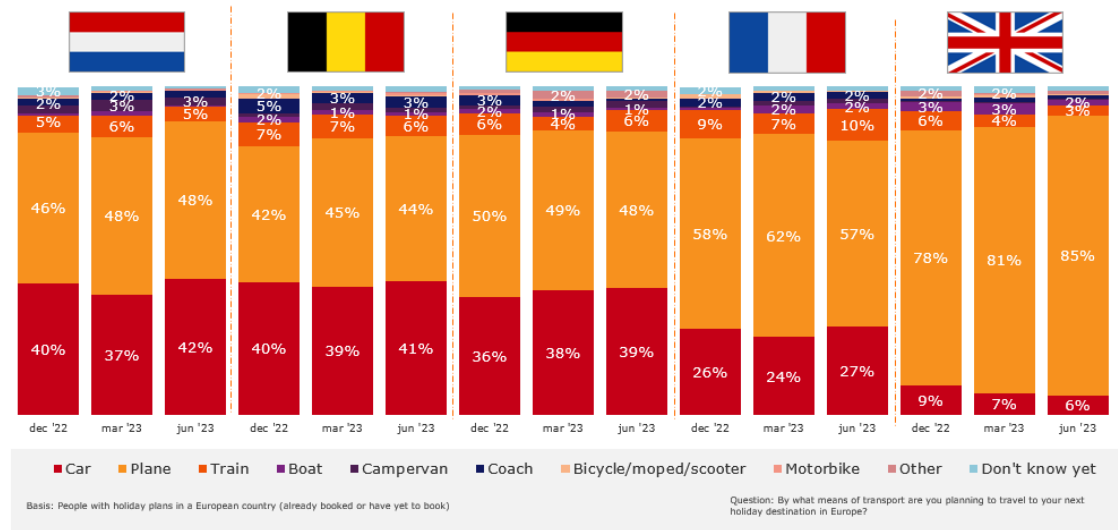
The Dutch, Belgians, Germans and British are largely planning to spend their next holiday abroad in Europe. A high number of French and Americans are planning to take their next holiday in their home country. Of Dutch people with holiday plans, an average of 22% have plans for a holiday at home. In the previous two summers, the Dutch staycation share was twice as high. Incidentally, in all countries, except the United States, staycation holiday 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.



**Means of transport**

**Aeroplane most chosen for European holidays**

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.



**Province**

**Drenthe and Limburg most considered for staycations**

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%).

## Determining factors

### **Flexible conditions, a quiet place and rising prices most important**

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%).

## Impact of inflation

### **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).

## Chinese target group

### Additional research in China:

Target group:	18+ years old, living in major cities in China and above-average interest in travelling to the Netherlands / Europe
Sample:	n= 413 respondents
Fieldwork:	1 June 2023 to 7 June 2023

### **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.

\*see target group specifications in the orange box above.

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.