

Holiday Sentiment Monitor

Results 17th 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 17th measurement. This measurement also focuses on topical issues such as sustainability, extreme weather conditions and inflation and how this affects holiday plans.

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: 25 to 31 August 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, 85% of those surveyed intend to go on holiday in the next 12 months. This intention is highest among Brits (88%) and lowest among Belgians (83%). Among the Dutch, it is 86%. This may involve a short or long holiday at home or abroad.

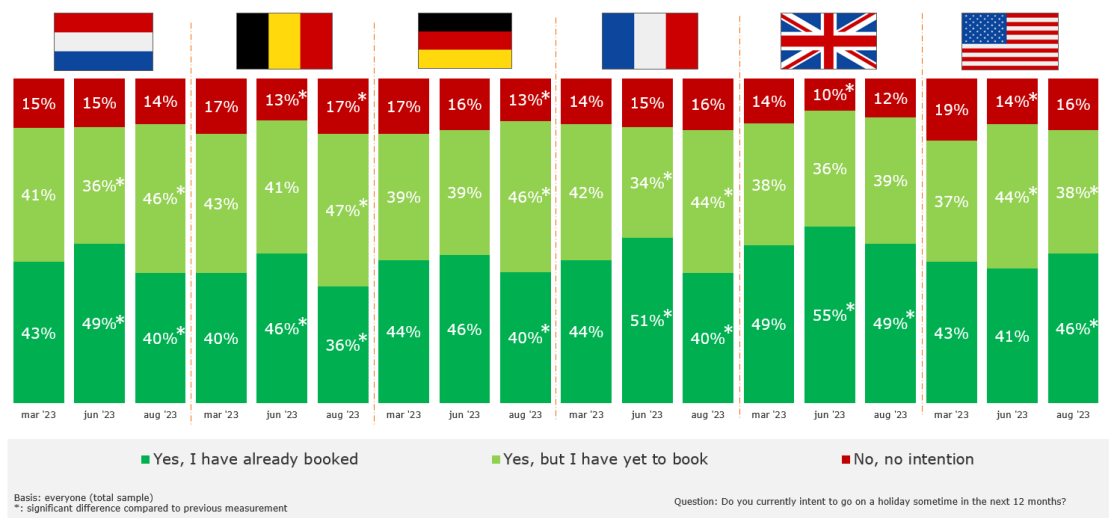


Holiday intention next 12 months (% top 2):

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

42% have already booked a holiday; with many leaving in September

The share that has already booked a holiday decreased compared to the June 2023 measurement. This can be explained by the fact that many people went away during the summer holidays. The share that has already booked is highest in the UK (49%) and lowest in Belgium (36%). Only among Americans, the proportion who have already booked has actually increased rather than decreased, compared to the previous survey. Among those who have already booked, an average of 35% say they will go in September and 21% in October. In terms of household type/living situation, Dutch people living with a partner have already booked holidays at the highest rate (48%). This is higher than Dutch people living alone or with child(ren) or those living with their parents.



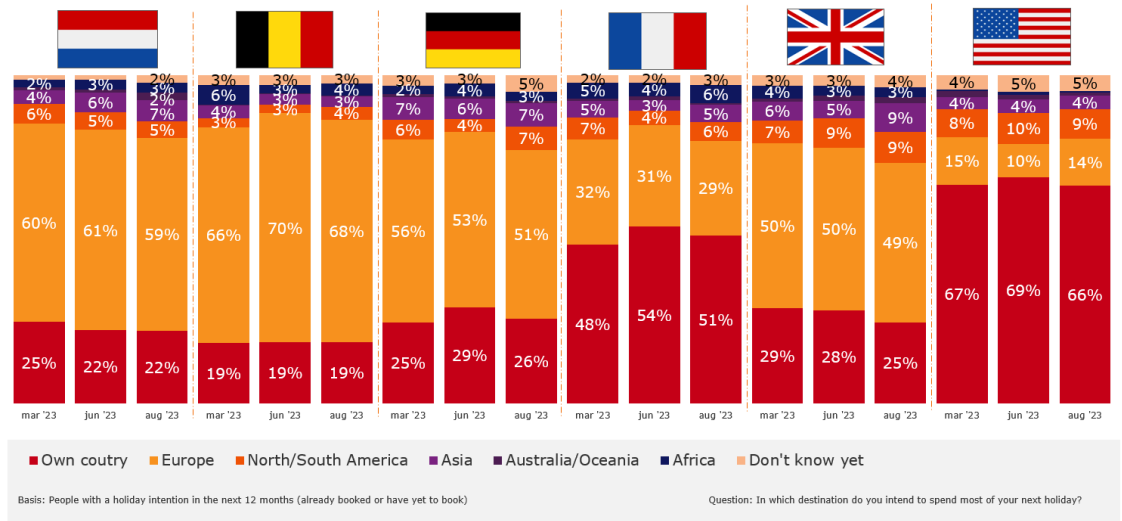
Over 40% of respondents have yet to book

Some 4 in 10 say they have yet to book a trip, but have holiday intentions for the next 12 months. Of that group, 60% are already looking. They mostly focus on October (average 19%), September (14%) and some are already looking at July next year (11%). Of the group that is already looking for their holiday, the largest group is planning to book within 1 to 3 months (average 28%). In addition, an average of 22% 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 25%) or their financial situation does not allow it (average 9%).

Amongst the Dutch, most holiday plans in Europe

The Dutch, Belgians, Germans and British largely plan to spend their next holiday elsewhere in Europe. Amongst the French and Americans, plans are mainly to take their next holiday in their own country. Of the Dutch with holiday intentions, an average of 59% have holiday plans in Europe, 22% in their own country and 7% in Asia. Additionally, in terms of travel companion(s), Dutch people travelling solo have the most intercontinental trips planned. Spain, Greece, Italy and France are frequently chosen European holiday destinations.

Holiday destination



Province

Drenthe, North Brabant and Limburg most considered for staycations

At the end of August (2023), Dutch people - who want to spend their next holiday in the Netherlands - said they most want to do so in Drenthe, North Brabant or Limburg (11%, 10% and 10% respectively). Compared to June '23, South Holland rose from 4% to 8%.

Determining factors

Flexible conditions, a quiet place and rising prices most important

71% 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. Interestingly, the importance of flexible conditions is about 10% lower among Dutch people than among the other five countries.

Impact of inflation

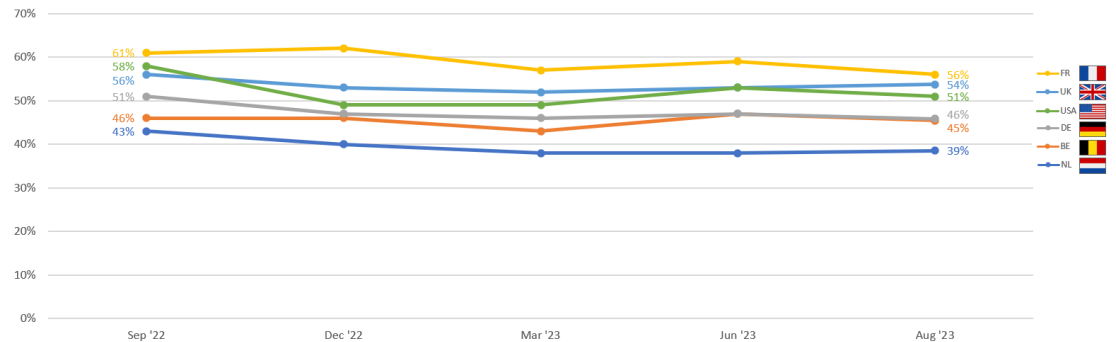
Almost half of respondents adjust holiday behaviour due to inflation

46% of people say they are forced to adjust their holiday behaviour due to increased living costs. The French are in highest agreement with this statement (54%) and the Dutch the least (39%). At the end of August (2023), people indicated that if they adjust their holiday behaviour (due to higher prices), they do so mainly by going on holiday less often (46% on average) or by choosing cheaper accommodation (42% on average). The least chosen options were avoiding the high season (average 26%) and saving on transport (average 19%).

Sustainability

Attention to sustainability regarding holidays decreased in four out of six countries

In September 2022, an average of 52% thought it was important to consider the environment when booking holidays. A year later, in August 2023, 48% consider it important. The year-on-year difference is greatest among Americans (-7%) and smallest among Belgians (-1%). In addition, the willingness to pay more for a holiday that takes the environment into account has decreased. This is the case among Germans, French, British and Americans. Among Dutch and Belgians, this has remained stable.



Basis: everyone (total sample)
Percentage: top 2 score ((totally) agree)

Extreme weather

Extreme weather affects holiday choice for many

50% of respondents went on holiday last summer (July/Aug '23) and 30% of that group said they experienced extreme weather conditions such as a heat wave, wildfire or extreme showers during this holiday. On average, 46% of all respondents said that increasing extreme weather conditions influence their choice of holidays. This proportion is even higher among those who experienced this extreme weather themselves last summer, at 65%.