Holiday Sentiment Monitor

Results 19-measurement

April 2024

NBTC
Nederlands Bureau
voor Toerisme &
Congressen

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Take outs

1.

9 in 10 respondents have a holiday intention.
On average, 91% of those surveyed intend to go on holiday in the next 12 months. This could be a short or long holiday at home or abroad.

2.

50% have already booked holidays, with many leaving in May.
The proportion that has already booked a holiday is highest amongst the Chinese (56%), British (53%) and Dutch (51%). For 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.

3.

Market potential: around 40% of respondents have holiday intentions but have yet to book. And of these, around 60% are already planning.
41% of those surveyed say they have yet to book, but do have a holiday intention in the next 12 months. Of that group, 61% are already planning. They focus mostly on July and August (both 21%). The Dutch also focus relatively often on May. Of the group that is already planning on a holiday, the largest group plans to book within 1 to 3 months (average 39%). In addition, 25% (on average) say they plan to book within 3 to 4 weeks and 16% within 1 to 2 weeks.

4.

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 (averaging 41%). After that, the 8-14 nights category is the most chosen (average 32%). Amongst the Dutch, however, it is just the opposite; 34% go for 4-7 nights and 37% go for 8-14 nights.

5.

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

Take outs

6.

Drenthe and Noord-Holland most considered for home holidays.
Dutch people who want to spend their next holiday in the Netherlands say they most want to 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 away decreased in Limburg and Gelderland.

7.

Netherlands in top 5 European holiday destinations among Belgians and Germans.
Amongst Belgians, France is still the favourite holiday country, however, the Netherlands is also in the top 5; currently in shared fifth place. Amongst Germans, the Netherlands is also in shared fifth place for a European holiday in the coming months.

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. 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.

9.

A fifth of the Dutch choose other destinations due to increasing extreme weather conditions.
People most often adjust the period when they go on holiday, due to increasing extreme weather conditions. This is followed by adjusting the destination. However, for the Dutch, adjusting the destination comes first and Brits and Americans adapt the most by paying extra attention to conditions and insurance when booking a holiday.

10.

Different sources of information used by younger and older age groups.
Amongst 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 notable 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.
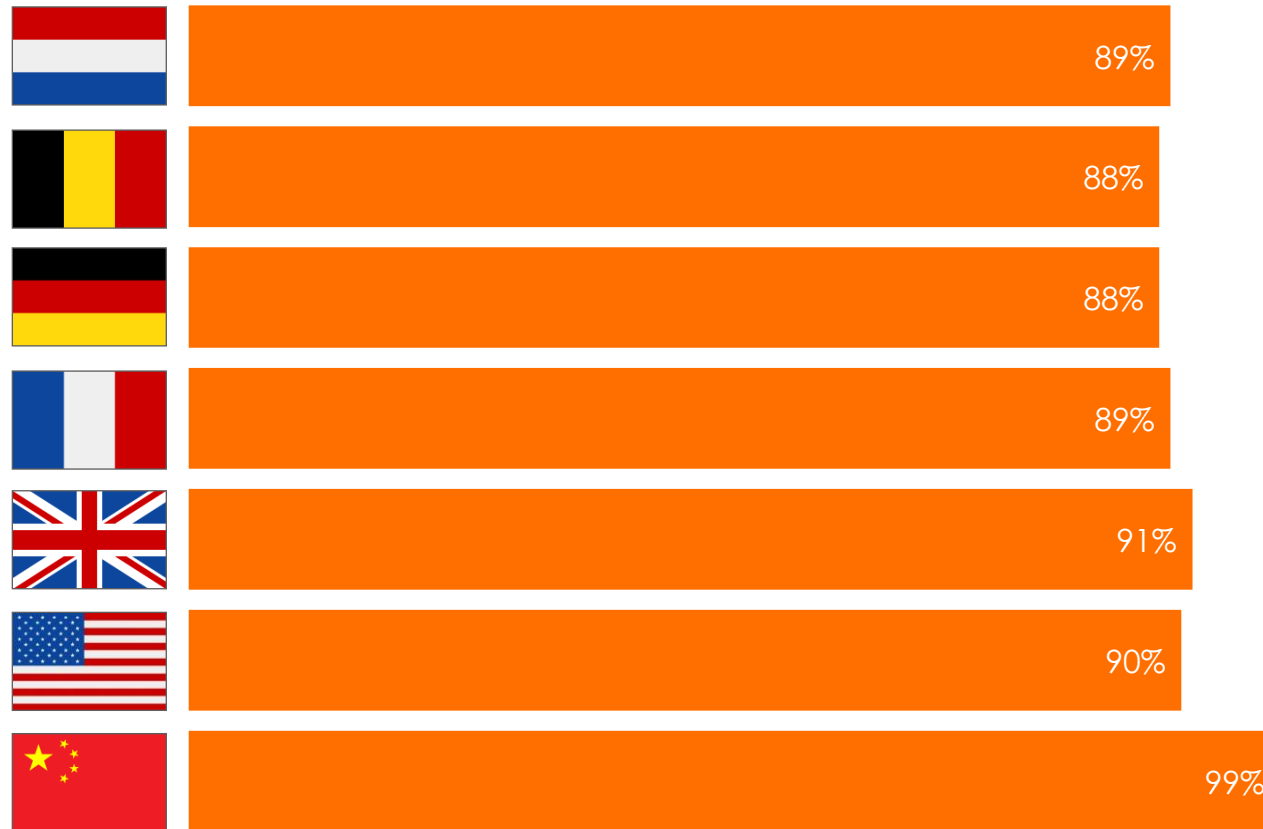
1. Holiday planning results

On average, 91% of respondents from the seven countries have an intention to go on holiday in the next 12 months, some of whom have already booked and some of whom have yet to book. These could be short or long holidays at home or abroad. A year ago, in March 2023, an average of 84% had a holiday intention (average of six countries; excluding China).

Country	%
Netherlands	89%
Belgium	88%
Germany	88%
France	89%
United Kingdom	91%
United States	90%
China	99%

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

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

On average, Apr. 2024 results show that, 50% have already booked a holiday sometime in the next 12 months. This is a higher percentage than about a year ago (March 2023), when it was 44%. The Chinese and British currently have the highest proportion 'already booked' (56% and 53% respectively). Among Belgians, this share is the lowest (46%).
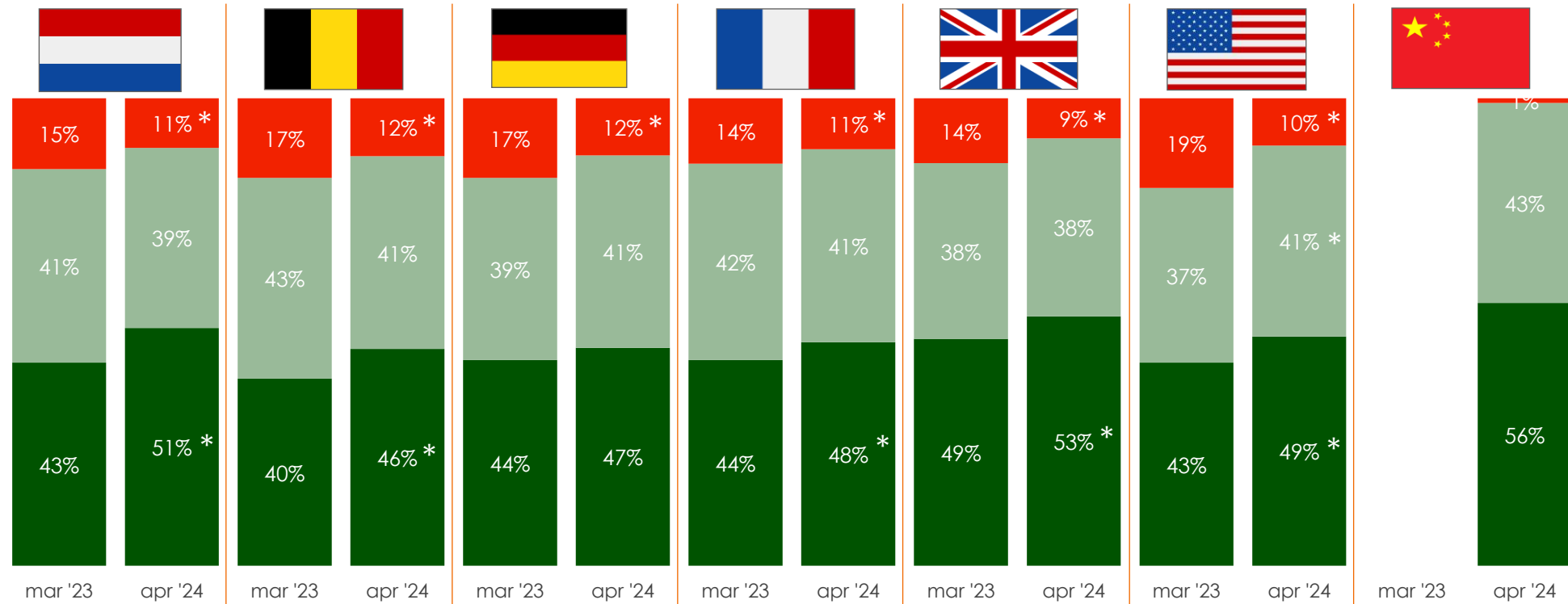
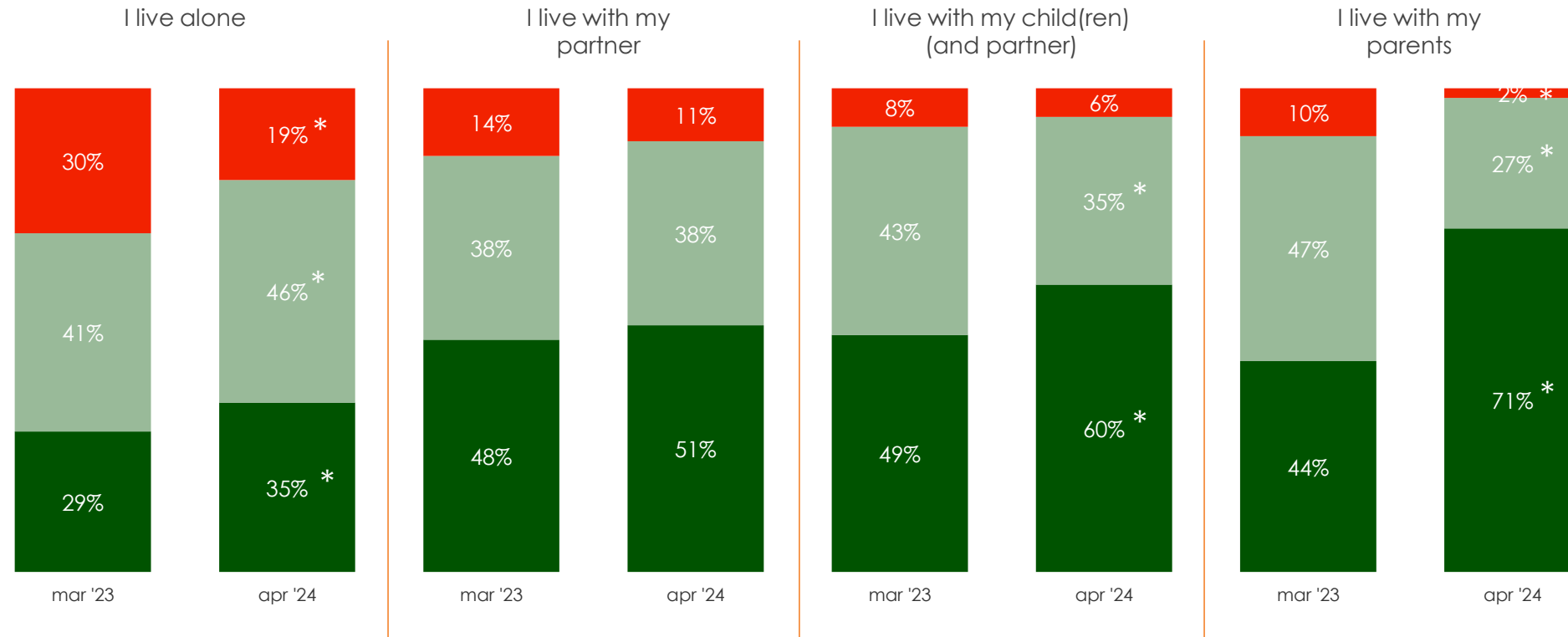Legend: ■ Yes, I have already booked ■ Yes, but I have yet to book ■ No, no intention

Base: everyone (entire sample)
*: significant difference compared to the measurement 1 year ago

Question: Do you currently intend to go on holiday sometime in the next 12 months?

Holiday intention 2/2

Dutch people living alone have already booked holidays in the lowest proportions. This share is highest among the group living with parents (71%) and the group living with child(ren) (and partner) (60%). In all groups, the percentage already booked is higher than in March 2023. This could (partly) be explained by the fact that the current measurement is slightly later in the year (April 2024).

I live alone

	mar '23	apr '24
No, no intention	30%	19% *
Yes, but I have yet to book	41%	46% *
Yes, I have already booked	29%	35% *

I live with my partner

	mar '23	apr '24
No, no intention	14%	11%
Yes, but I have yet to book	38%	38%
Yes, I have already booked	48%	51%

I live with my child(ren) (and partner)

	mar '23	apr '24
No, no intention	8%	6%
Yes, but I have yet to book	43%	35% *
Yes, I have already booked	49%	60% *

I live with my parents

	mar '23	apr '24
No, no intention	10%	2% *
Yes, but I have yet to book	47%	27% *
Yes, I have already booked	44%	71% *

Legend: ■ Yes, I have already booked ■ Yes, but I have yet to book ■ No, no intention

Base: Dutch (entire sample)
*: significant difference compared to measurement 1 year ago
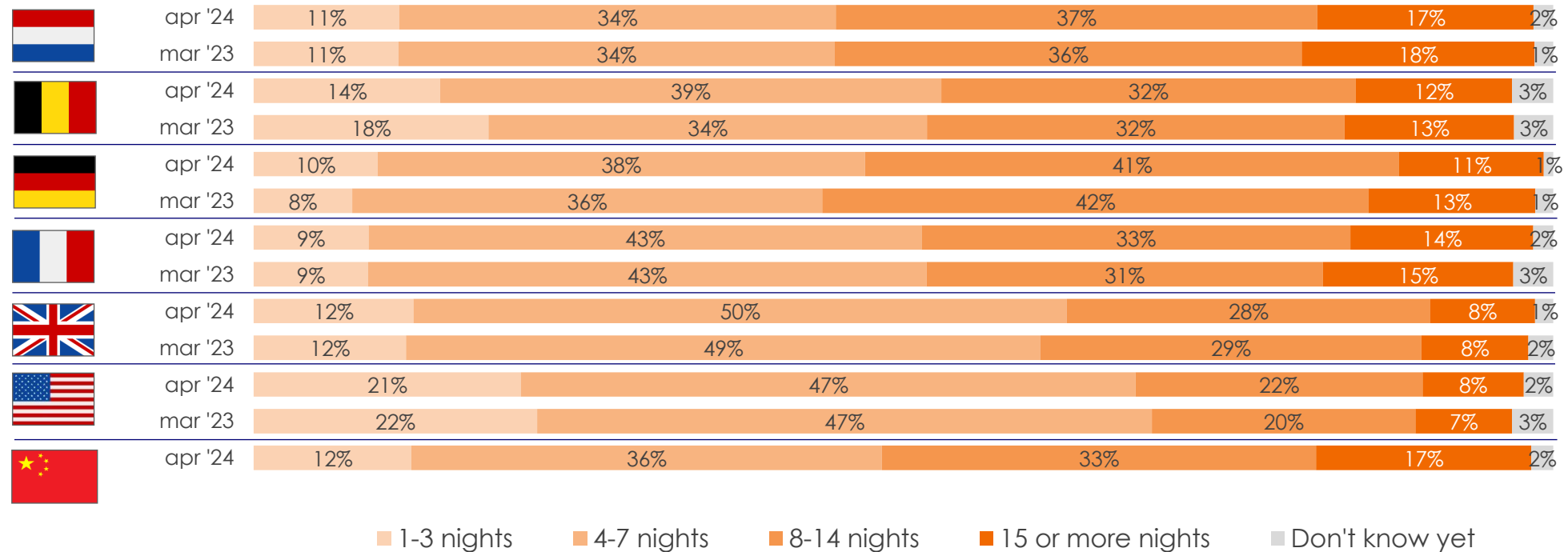Note: the most common household/living situation types are shown here

Question: Do you currently intend to go on holiday sometime in the next 12 months go on holiday?

Holiday intention vs living situation (NL)

8

On average, the majority of respondents with a holiday intention are going away for 4-7 nights for their next holiday (averaging 41%). After that, the 8-14 nights category is the most chosen (average 32%). A year ago, this was a similar pattern. Amongst Americans, the proportion of short holidays is highest compared to other countries; 21% go away for 1-3 nights.
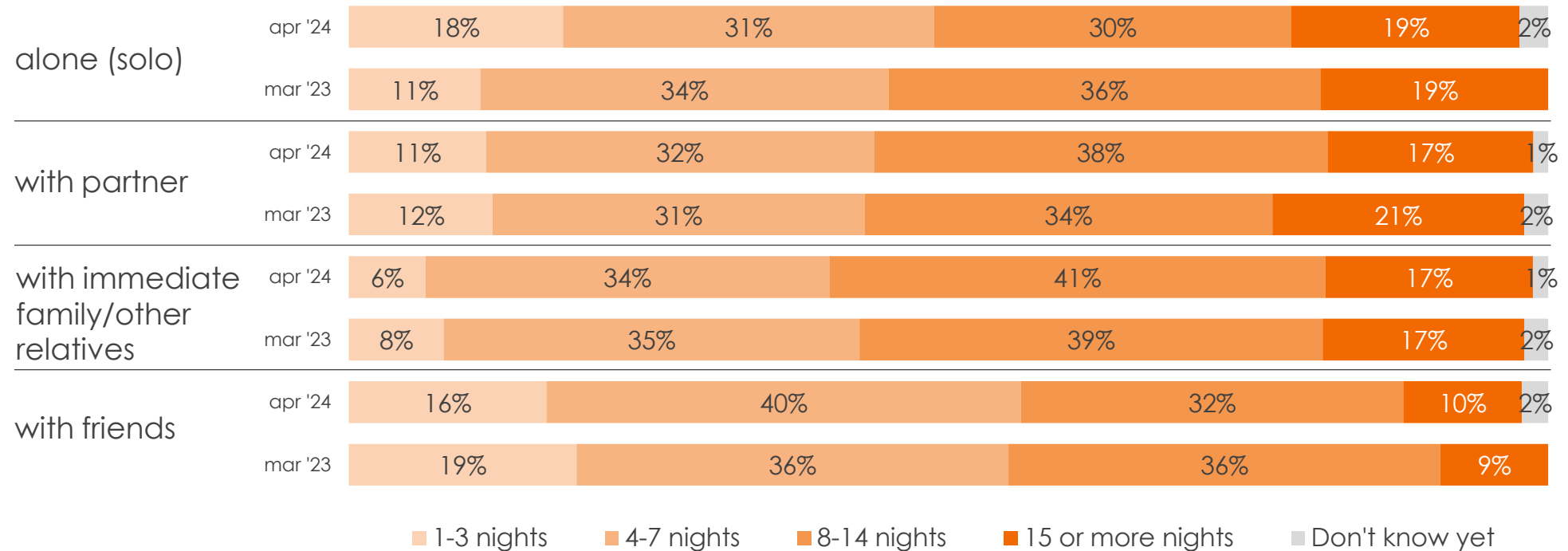
		1-3 nights	4-7 nights	8-14 nights	15 or more nights	Don't know yet
🇳🇱	apr '24	11%	34%	37%	17%	2%
	mar '23	11%	34%	36%	18%	1%
🇧🇪	apr '24	14%	39%	32%	12%	3%
	mar '23	18%	34%	32%	13%	3%
🇩🇪	apr '24	10%	38%	41%	11%	1%
	mar '23	8%	36%	42%	13%	1%
🇫🇷	apr '24	9%	43%	33%	14%	2%
	mar '23	9%	43%	31%	15%	3%
🇬🇧	apr '24	12%	50%	28%	8%	1%
	mar '23	12%	49%	29%	8%	2%
🇺🇸	apr '24	21%	47%	22%	8%	2%
	mar '23	22%	47%	20%	7%	3%
🇨🇳	apr '24	12%	36%	33%	17%	2%

Legend: ■ 1-3 nights   ■ 4-7 nights   ■ 8-14 nights   ■ 15 or more nights   ■ Don't know yet

Base: People with holiday plans for the next 12 months (booked or yet to book)

Question: How long do you plan to be away on your next holiday?

Number of nights

In April 2024, Dutch people who go on holiday with their partner, with family or with friends have a similar pattern in terms of the length of the next holiday, compared to March 2023. Dutch people who travel/holiday alone now go on more short holidays than a year ago.

travel company		1-3 nights	4-7 nights	8-14 nights	15 or more nights	Don't know yet
alone (solo)	apr '24	18%	31%	30%	19%	2%
	mar '23	11%	34%	36%	19%	
with partner	apr '24	11%	32%	38%	17%	1%
	mar '23	12%	31%	34%	21%	2%
with immediate family/other relatives	apr '24	6%	34%	41%	17%	1%
	mar '23	8%	35%	39%	17%	2%
with friends	apr '24	16%	40%	32%	10%	2%
	mar '23	19%	36%	36%	9%	

Legend: ■ 1-3 nights ■ 4-7 nights ■ 8-14 nights ■ 15 or more nights ■ Don't know yet

Base: People with holiday plans for the next 12 months (booked or yet to book)
Note: the most common travel company types are shown here

Question: How long do you plan to be away on your next holiday?

Number of nights vs. travel company (NL)

In general, most bookings were made directly with the provider (49% on average). A year ago, this was 47% on average. Americans who have already booked a holiday say they did so most often directly with the provider (63%). Belgians and Germans booked most often via a travel agent/tour operator/booking website (45% and 46% respectively).

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
Directly at the provider (e.g. directly at the hotel/accommodation/ transport company)	50% (46%)	42% (41%)	40% (40%)	48% (49%)	50% (48%)	63% (59%)	49%
Through a travel agent/ tour operator or booking website	39% (43%)	45% (43%)	46% (45%)	36% (35%)	36% (37%)	18% (22%)	36%
A combination of the above two options	8% (8%)	7% (8%)	11% (11%)	12% (12%)	11% (11%)	14% (14%)	13%
Other, namely	3% (3%)	5% (7%)	2% (4%)	3% (4%)	2% (3%)	4% (4%)	0%
Don't know	1% (0%)	1% (1%)	1% (1%)	2% (1%)	1% (1%)	2% (2%)	2%

Among 'other, namely', a private holiday home or (holiday) home of friends/family is mentioned.

Base: People who have already booked a holiday for the next 12 months.
Highlighted: the highest percentage by country.
In brackets the score of the measurement one year ago.

Question: How is your next holiday booked?

How booked

Among those who have already booked a holiday, the next holiday is mostly in May (average 22%). This is also true for the Dutch (24%). Amongst the Belgians and French, July is the month when their next holiday mostly occurs. October scores relatively high amongst the Chinese, because of the 'golden week' in that month.

	Netherlands	Belgium	Germany	France	UK	USA	China
January	2%	0%	1%	1%	1%	1%	0%
February	1%	0%	0%	1%	1%	1%	0%
March	2%	1%	1%	1%	0%	1%	0%
April	19%	13%	13%	15%	16%	16%	9%
May	24%	19%	22%	15%	20%	23%	29%
June	13%	16%	17%	17%	21%	22%	13%
July	17%	26%	18%	23%	13%	15%	12%
August	12%	13%	15%	18%	12%	10%	15%
September	7%	7%	9%	7%	10%	3%	6%
October	1%	2%	3%	1%	4%	3%	11%
November	1%	1%	1%	0%	2%	3%	2%
December	1%	0%	1%	1%	1%	2%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Base: people who have already booked a holiday
Highlighted: highest percentage by country

Question: In which month will you leave for your next holiday?

Departure month: holiday already booked

Of the Dutch who have already booked a holiday, the next holiday is mostly in May. This applies specifically to Dutch people going on holiday with their partner and those going with one or more friends. Dutch people going on their next holiday with family or relatives have July as the most booked departure month.

	With partner	With family	With friends*
January	1%	0%	0%
February	1%	1%	0%
March	3%	1%	2%
April	18%	20%	14%
May	29%	18%	29%
June	14%	12%	18%
July	11%	27%	14%
August	10%	17%	8%
September	8%	2%	16%
October	1%	1%	0%
November	1%	0%	0%
December	1%	1%	0%
Total	**100%**	**100%**	**100%**

Base: people who have already booked a holiday
Highlighted: the highest percentage by category
Note: The most common travel company types are shown here

Question: In which month will you leave for your next holiday?
* 'With friends' category indicative: n=51.

Departure month vs. travel company (NL)

Of those who have already booked a holiday for the next 12 months, the largest group booked it in Jan/Feb/March 2024 (average 33%), especially the Chinese, where there is a remarkable amount of booking in this period (52%).

Country	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Otherwise	Do not know
Netherlands	23%	13%	13%	19%	26%	5%	1%
Belgium	20%	11%	13%	17%	30%	5%	3%
Germany	15%	12%	15%	19%	29%	8%	2%
France	21%	10%	16%	16%	32%	4%	1%
UK	21%	10%	14%	21%	30%		2%
USA	24%	14%	12%	14%	30%	4%	3%
China	3%	8%	13%	24%	52%		1%

Legend: ■ Q1 2023 ■ Q2 2023 ■ Q3 2023 ■ Q4 2023 ■ Q1 2024 ■ Otherwise ■ Do not know
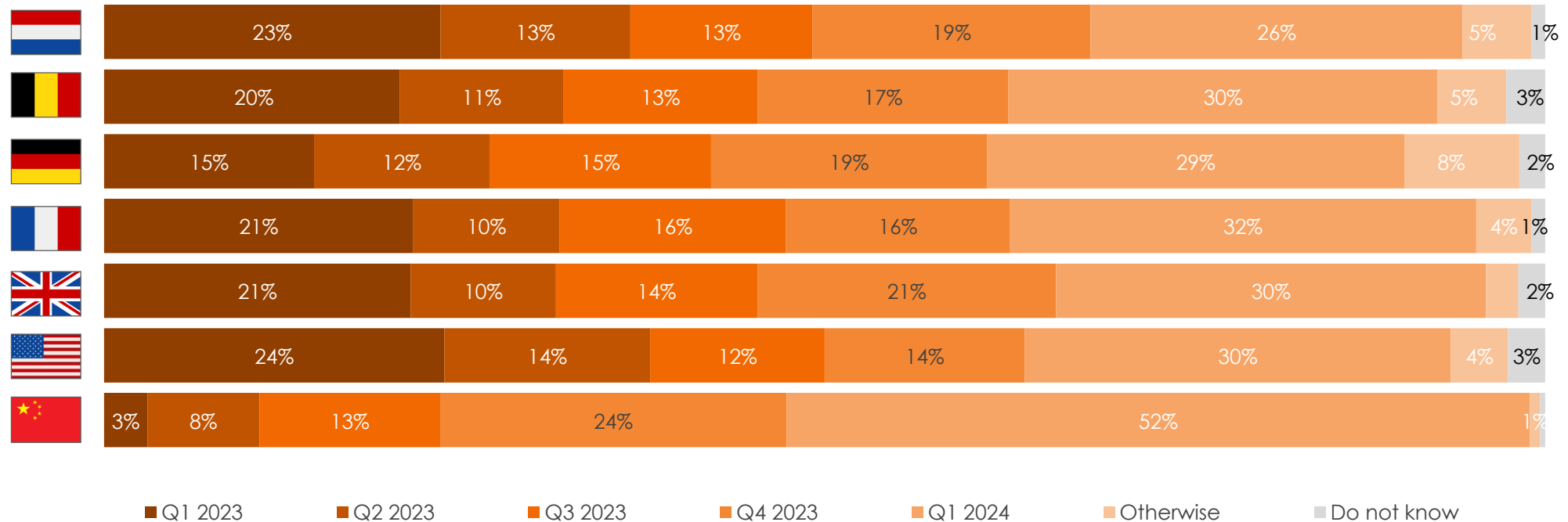
Base: People who have already booked a holiday

Question: When did you book your next holiday?

**Period of holidays already booked**

14

On average, 41% have a holiday intention for the next 12 months but have yet to book. Of this group that has yet to book, an average of 61% are planning for a holiday. In this respect, the months of July and August are currently the most looked at (both 21% on average). The Dutch also plan for May relatively often. Amongst the Chinese, August is a popular month.
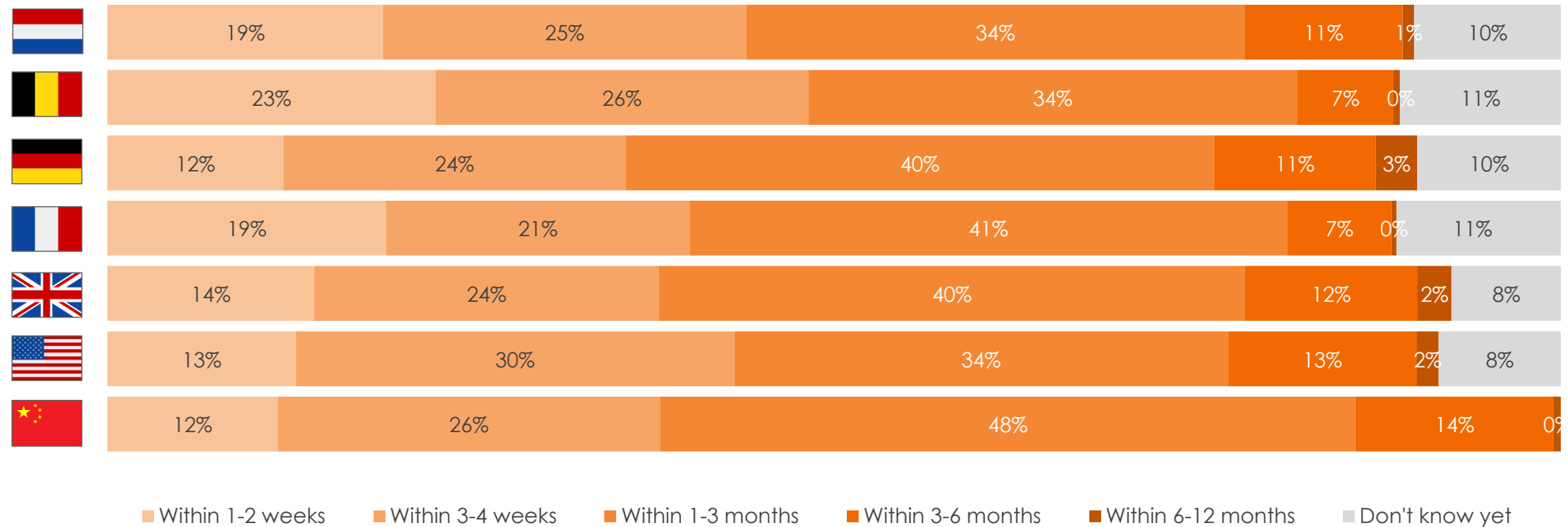
Holiday intention but have yet to book

39%	41%	41%	41%	38%	41%	43%
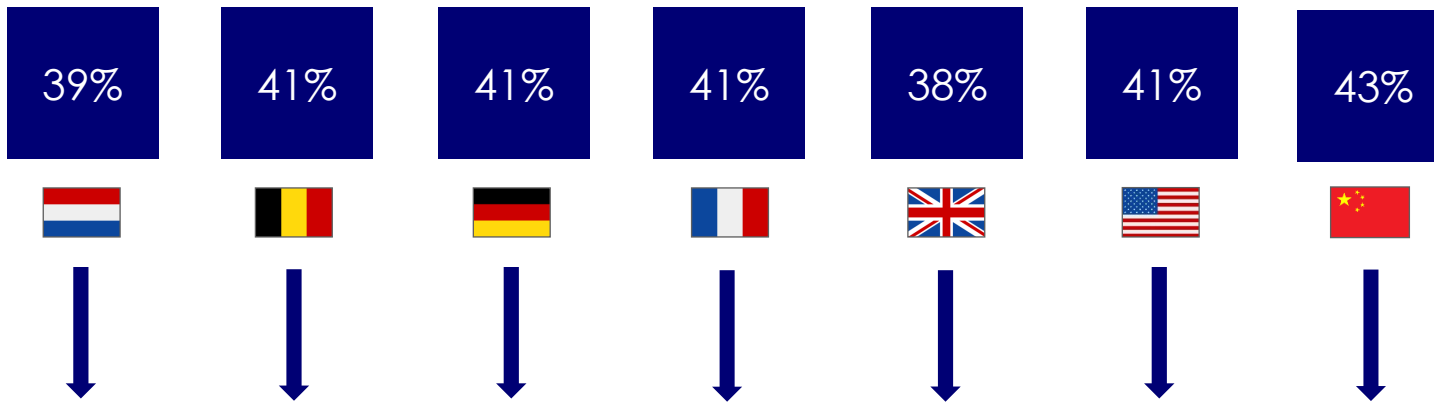
Planning for holidays

62%	53%	71%	65%	66%	62%	48%
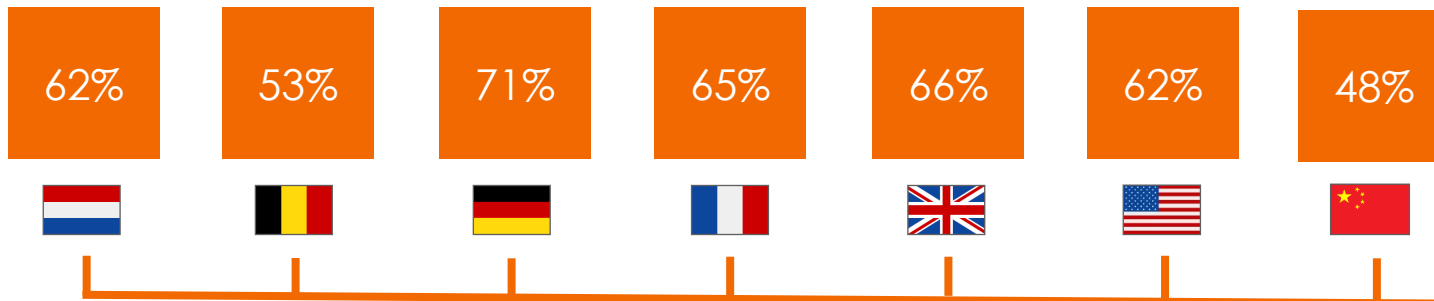
	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
Month of departure:							
January	1%	0%	0%	0%	0%	1%	0%
February	1%	0%	0%	0%	0%	1%	0%
March	1%	0%	0%	0%	0%	0%	1%
April	5%	1%	3%	4%	3%	2%	0%
May	**21%**	15%	10%	11%	9%	11%	14%
June	15%	20%	15%	16%	**20%**	**29%**	9%
July	**21%**	**27%**	**22%**	22%	**20%**	22%	10%
August	15%	16%	21%	**23%**	19%	15%	**42%**
September	16%	14%	18%	15%	15%	8%	12%
October	3%	2%	6%	5%	6%	6%	9%
November	3%	3%	2%	2%	2%	2%	2%
December	0%	0%	2%	2%	5%	3%	0%
Number	N=248	N=226	N=314	N=292	N=253	N=262	N=205

Potential holidays

Among those who are planning for a holiday in the next 12 months, the largest group plans to book it within 1 to 3 months (39% on average). In addition, 25% (on average) say they plan to book within 3 to 4 weeks, 16% within 1 to 2 weeks and 11% within 3 to 6 months.

Flag	Within 1-2 weeks	Within 3-4 weeks	Within 1-3 months	Within 3-6 months	Within 6-12 months	Don't know yet
Netherlands	19%	25%	34%	11%	1%	10%
Belgium	23%	26%	34%	7%	0%	11%
Germany	12%	24%	40%	11%	3%	10%
France	19%	21%	41%	7%	0%	11%
UK	14%	24%	40%	12%	2%	8%
USA	13%	30%	34%	13%	2%	8%
China	12%	26%	48%	14%	0%	

Legend: ■ Within 1-2 weeks ■ Within 3-4 weeks ■ Within 1-3 months ■ Within 3-6 months ■ Within 6-12 months □ Don't know yet

Base: People who have yet to book holidays but are already planning

Question: When do you plan to book the holiday you are planning on?

From planning to booking

On average, 61% of the people who have not yet booked, but have the intention of going on holiday in the next 12 months, are already planning their upcoming holiday. If people have a holiday intention, but are not yet planning, it is mainly because they have not yet got around to it (average 19%). Amongst the Dutch, their financial situation plays a small role in this (6%). Amongst the Chinese, uncertainty about current wars in the world plays a relatively large role.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
Yes (already planning)	62%	53%	71%	65%	66%	62%	48%
No, I haven't got around to planning yet	25%	28%	13%	21%	20%	19%	10%
No, my financial situation does not allow it (e.g. due to inflation and rising prices)	6%	13%	9%	9%	8%	15%	15%
No, because of uncertainties surrounding current wars	4%	5%	6%	5%	3%	2%	28%
No, for another reason	4%	2%	1%	0%	3%	2%	0%

Base: People who have not yet booked (but have holiday intentions for the next 12 months)

Question: Are you already planning for your upcoming holiday?

To plan or not to plan

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

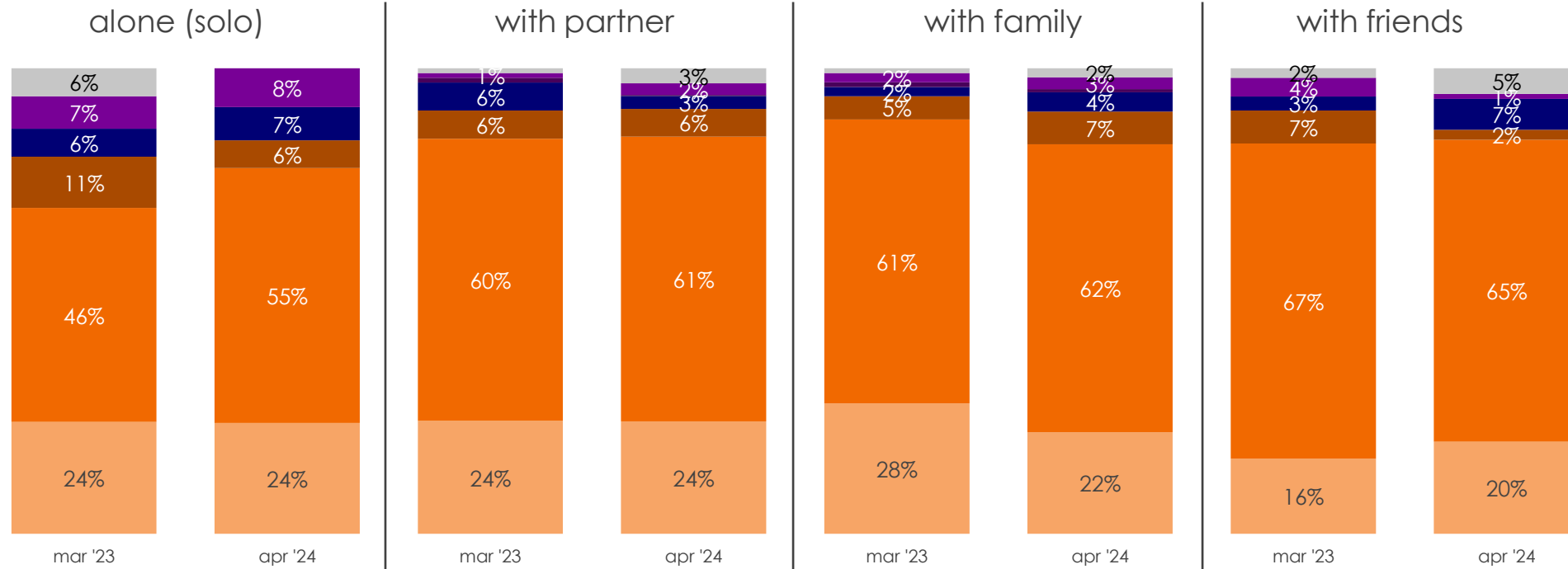|	mar '23	apr '24
Netherlands	Don't know yet 1%, Africa 2%, Asia 4%, N/S America 6%, Europe 60%, Own country 25%	Don't know yet 3%, Africa 3%, Asia 4%, N/S America 6%, Europe 61%, Own country 23%
Belgium	Don't know yet 3%, Africa 6%, Asia 4%, N/S America 3%, Europe 66%, Own country 19%	Don't know yet 4%, Africa 4% *, Asia 3%, N/S America 3%, Europe 71% *, Own country 15% *
Germany	Don't know yet 3%, Africa 2%, Asia 7%, N/S America 6%, Europe 56%, Own country 25%	Don't know yet 4%, Africa 2%, Asia 6%, N/S America 5%, Europe 56%, Own country 25%
France	Don't know yet 2%, Africa 5%, Asia 5%, N/S America 7%, Europe 32%, Own country 48%	Don't know yet 3%, Africa 5%, Asia 4%, N/S America 5% *, Europe 32%, Own country 50%
UK	Don't know yet 3%, Africa 4%, Asia 6%, N/S America 7%, Europe 50%, Own country 29%	Don't know yet 3%, Africa 3%, Asia 7%, N/S America 8%, Europe 52%, Own country 26%
USA	Don't know yet 4%, Africa 2%, Asia 4%, N/S America 8%, Europe 15%, Own country 67%	Don't know yet 6% *, Africa 1%, Asia 4%, N/S America 10%, Europe 15%, Own country 63% *
China		Don't know yet 2%, Africa 4%, Asia 22%, N/S America 14%, Europe 22%, Own country 36%

Legend: ■ Own country ■ Europe ■ North/South America ■ Asia ■ Australia/Oceania ■ Africa ■ Don't know yet

Base: People with holiday plans in the next 12 months (booked or have yet to book).
*: significant difference compared to measurement 1 year ago

Question: In which destination do you plan to spend your next holiday mainly?

Region/continent

Dutch people going on holiday alone are more likely to plan their next holiday in Europe compared to a year ago. North/South America has declined among this group. Groups of friends have somewhat more plans for their own country than a year ago and likewise for Asia. Families have their home country in mind slightly less, compared to a year ago and are going more to other continents.
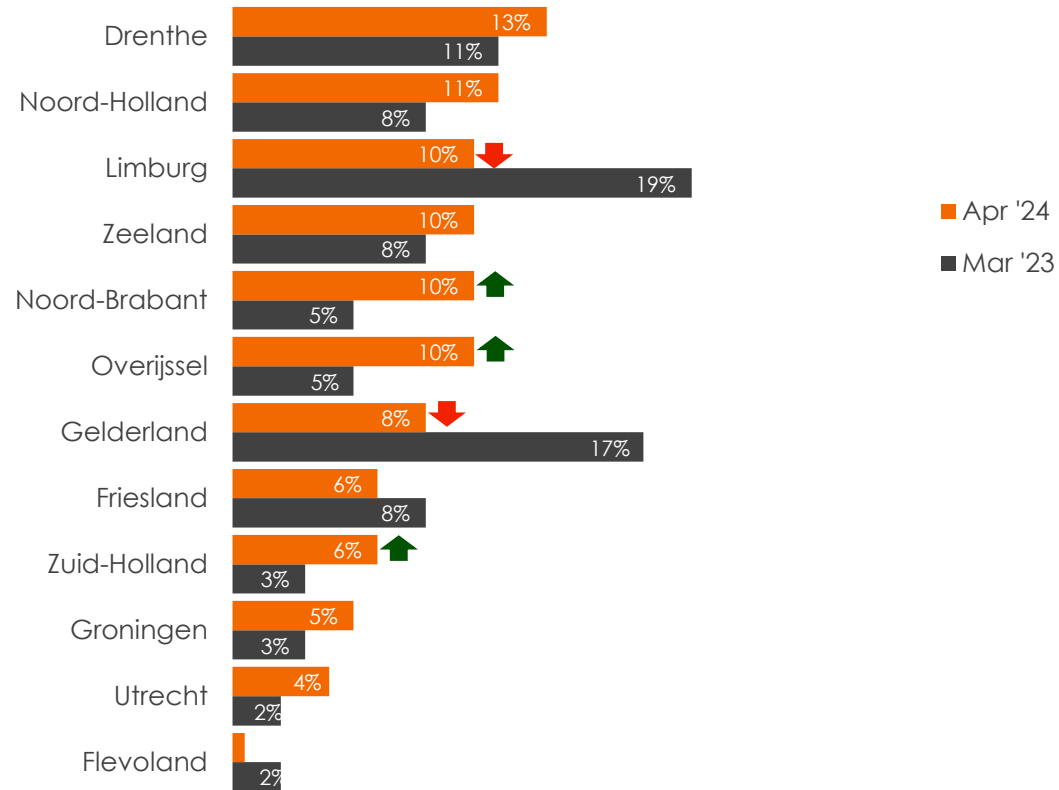

alone (solo)

	mar '23	apr '24
Don't know yet	6%	
Africa	7%	8%
Asia	6%	7%
North/South America	11%	6%
Europe	46%	55%
Own country	24%	24%

with partner

	mar '23	apr '24
Don't know yet		3%
Asia	1%	2%
	6%	3%
North/South America	6%	6%
Europe	60%	61%
Own country	24%	24%

with family

	mar '23	apr '24
	2%	2%
	2%	3%
		4%
North/South America	5%	7%
Europe	61%	62%
Own country	28%	22%

with friends

	mar '23	apr '24
Don't know yet	2%	5%
	4%	1%
	3%	7%
North/South America	7%	2%
Europe	67%	65%
Own country	16%	20%

Legend: ■ Own country ■ Europe ■ North/South America ■ Asia ■ Australia/Oceania ■ Africa ■ Don't know yet

Base: Dutch people with holiday plans in the next 12 months (booked or have yet to book)
Note: the most common travel company types are shown here

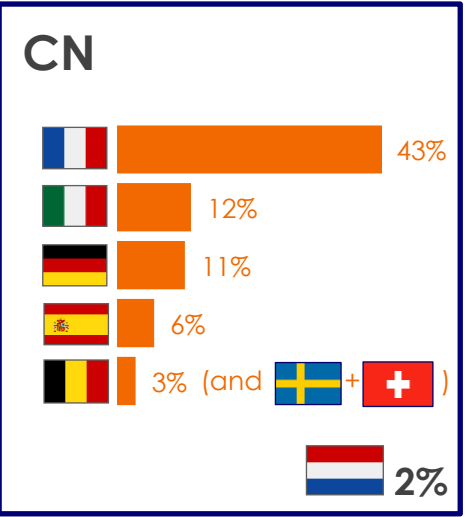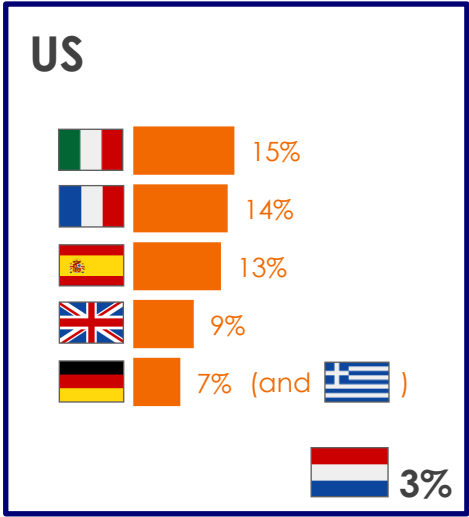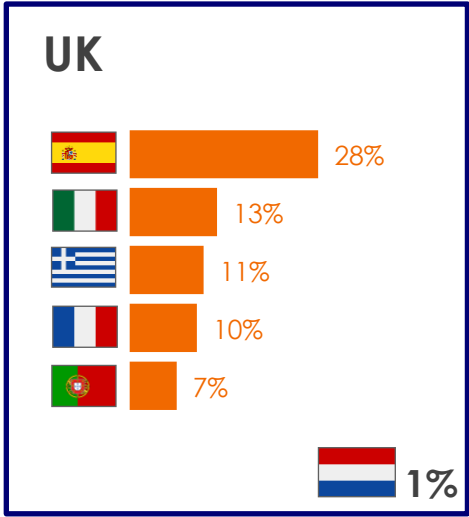Question: In which destination do you plan to spend your next holiday mainly?

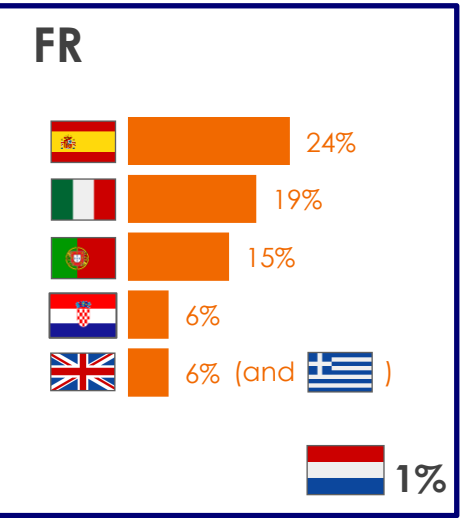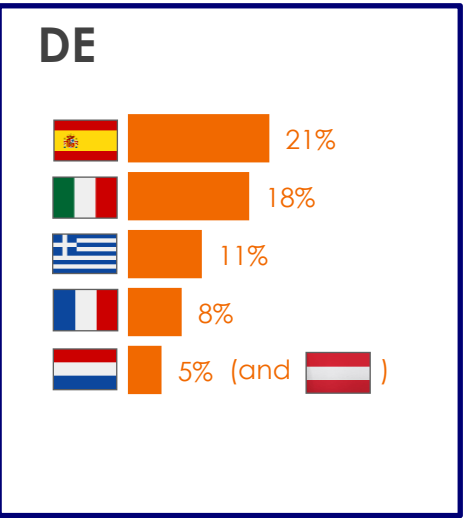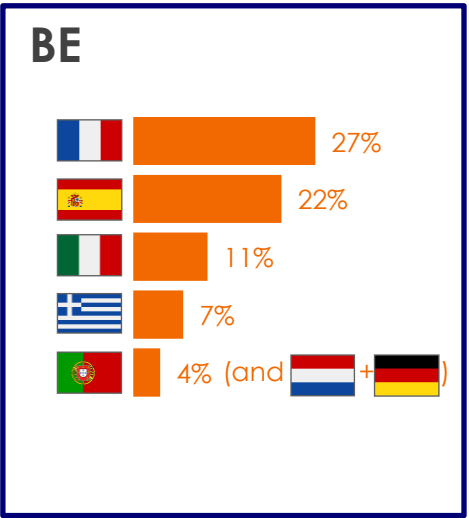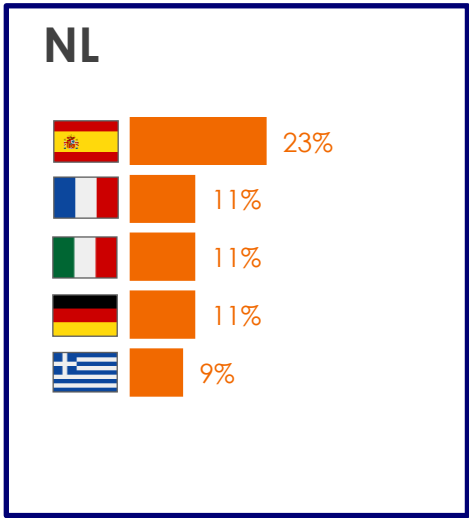## Region/continent vs. travel companion (NL)

19

Dutch people who want to spend their next holiday in the Netherlands most often say they want to do so in 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 away decreased in Limburg and Gelderland.

Legend:
- Apr '24
- Mar '23

Province	Apr '24	Mar '23
Drenthe	13%	11%
Noord-Holland	11%	8%
Limburg	10% ▼	19%
Zeeland	10%	8%
Noord-Brabant	10% ▲	5%
Overijssel	10% ▲	5%
Gelderland	8% ▼	17%
Friesland	6%	8%
Zuid-Holland	6% ▲	3%
Groningen	5%	3%
Utrecht	4%	2%
Flevoland		2%

Base: Dutch people with holiday plans in the Netherlands (booked or yet to book)
Arrow: significant difference compared to a year ago

Question: In which province do you plan to spend your next holiday (in the Netherlands) mainly?

Destination province: Dutch holidaymakers

NL
- Spain: 23%
- France: 11%
- Italy: 11%
- Germany: 11%
- Greece: 9%

BE
- France: 27%
- Spain: 22%
- Italy: 11%
- Greece: 7%
- Portugal: 4% (and Netherlands + Germany)

DE
- Spain: 21%
- Italy: 18%
- Greece: 11%
- France: 8%
- Netherlands: 5% (and Austria)

FR
- Spain: 24%
- Italy: 19%
- Portugal: 15%
- Croatia: 6%
- UK: 6% (and Greece)
- Netherlands: 1%

UK
- Spain: 28%
- Italy: 13%
- Greece: 11%
- France: 10%
- Portugal: 7%
- Netherlands: 1%

US
- Italy: 15%
- France: 14%
- Spain: 13%
- UK: 9%
- Germany: 7% (and Greece)
- Netherlands: 3%

CN
- France: 43%
- Italy: 12%
- Germany: 11%
- Spain: 6%
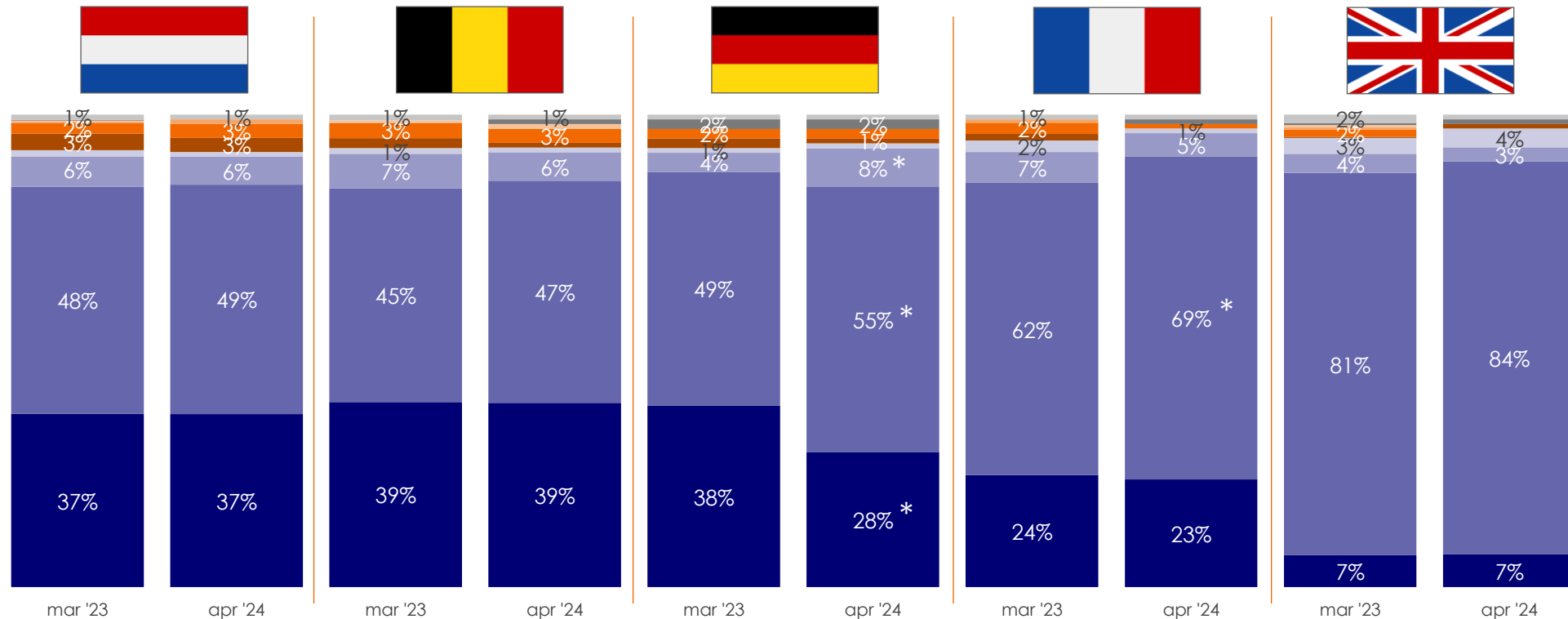- Belgium: 3% (and Sweden + Switzerland)
- Netherlands: 2%

- Spain is the most popular European holiday country. In all seven countries, Spain returns in the top 5; and in four countries even in first place. Spain is a favourite among the Dutch, Germans, French and British.

- Among Belgians, France ranks highest. Among Belgians, the Netherlands is currently in a shared fifth place.

- Among Germans, the Netherlands is also in a shared fifth place (with Austria) for a European holiday in the coming months.

- Like Spain, Italy appears in the top five of all countries. Among Americans, it is now the number one destination.

- Among Chinese, France, by a wide margin, is the most chosen European holiday country.

Base: People with holiday plans in Europe (booked or has yet to book)

Question: Where in Europe do you plan to spend your next holiday mainly?

Top 5 European destinations

In all five countries, plane is the most chosen means of transport for the next holiday in Europe (59% on average). A year ago, the average was 56%. Amongst Dutch and Belgians, the car also scores relatively high. Among Germans, the share of car journeys decreased and air and train journeys increased. Amongst the French, the share of air travel has also increased compared to a year ago.

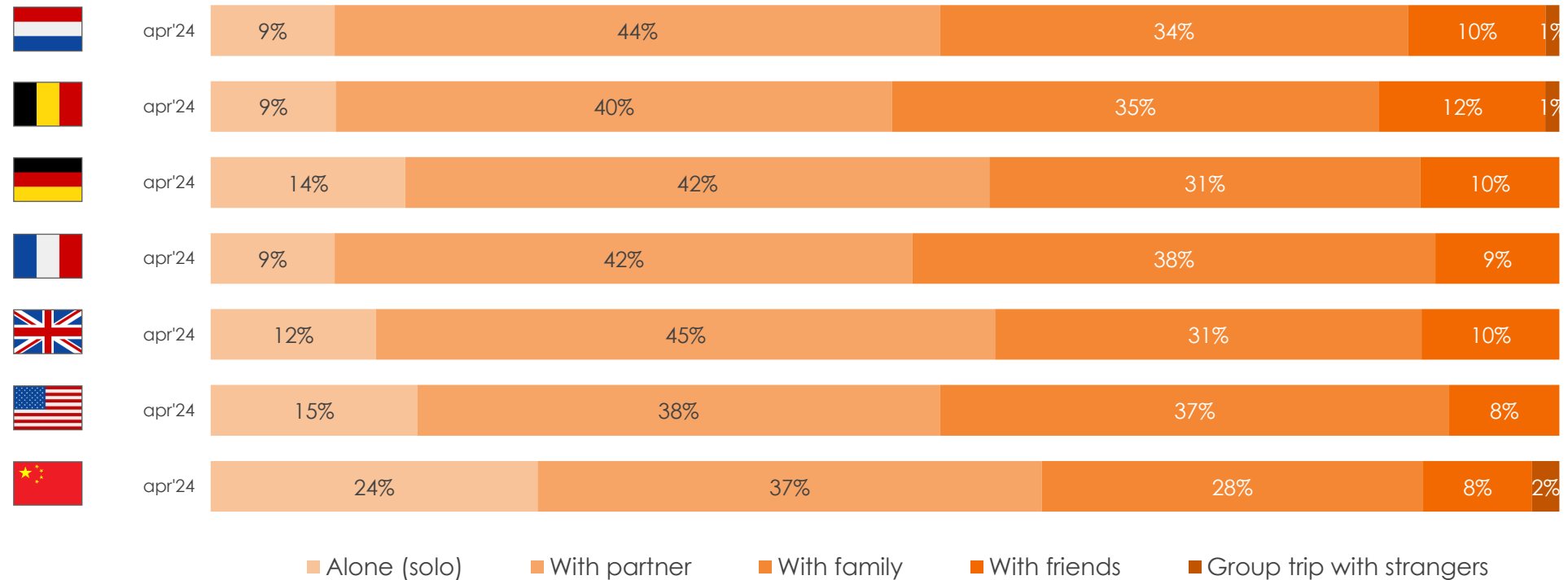|	Netherlands		Belgium		Germany		France		United Kingdom	
	mar '23	apr '24	mar '23	apr '24	mar '23	apr '24	mar '23	apr '24	mar '23	apr '24

Legend: ■ Car ■ Aeroplane ■ Train ■ Boat ■ Campervan ■ Coach ■ Bicycle/Moped/Scooter ■ Motorbike ■ Other ■ Don't know

Base: People with holiday plans in a European country (booked or yet to book)
*: significant difference compared to measurement 1 year ago

Question: By what means of transport are you considering going to your next holiday destination in Europe?

Means of transport on European holidays

On average, the largest group goes on holiday with their partner (41% on average), followed by a holiday with immediate family/other relatives (33% on average). Furthermore, 13% on average have plans for a solo trip and 10% for a holiday/trip with one or more friends. A year ago, this was a similar pattern. In China, the proportion of solo travellers is relatively high.

Country	apr'24	Alone (solo)	With partner	With family	With friends	Group trip with strangers
Netherlands	apr'24	9%	44%	34%	10%	1%
Belgium	apr'24	9%	40%	35%	12%	1%
Germany	apr'24	14%	42%	31%	10%	
France	apr'24	9%	42%	38%	9%	
United Kingdom	apr'24	12%	45%	31%	10%	
United States	apr'24	15%	38%	37%	8%	
China	apr'24	24%	37%	28%	8%	2%

■ Alone (solo) ■ With partner ■ With family ■ With friends ■ Group trip with strangers

Base: People with holiday plans for the next 12 months (booked or yet to book)

Question: With which travel companion do you plan to take your next holiday?

Travel companion

A hotel/guesthouse is the most popular type of accommodation (52% on average). This is followed by an apartment and renting accommodation from a private person (both averaging 10%). Renting from private individuals is most popular among the French. Amongst the Dutch, a bungalow (park) and camping score relatively high. Chinese opt highest for a hotel/guesthouse.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
Hotel/guesthouse	41%	45%	54%	35%	54%	56%	75%
Bed and breakfast	7%	7%	3%	5%	7%	5%	-
Apartment	15%	13%	21%	12%	10%	3%	-
Bungalow(park)	10%	5%	3%	6%	2%	0%	2%
Campsite	9%	6%	3%	11%	3%	4%	4%
Group accommodation	1%	1%	0%	1%	1%	0%	-
With a private individual (e.g. Airbnb)	5%	7%	4%	16%	9%	11%	14%
Boat	1%	2%	1%	1%	2%	4%	1%
Second home	1%	2%	0%	2%	2%	1%	0%
Residence of family/friends/ relatives	5%	8%	6%	8%	5%	10%	1%
Otherwise	2%	1%	2%	1%	3%	2%	0%

Base: People with holiday plans for the next 12 months (booked or yet to book)
Highlighted: 3 highest scores per country

Question: What type of accommodation are you planning to stay in during your next holiday?

Type of accommodation

A beach holiday is the most frequently planned (average 23%). This is followed by the city break, which is often undertaken by the Chinese. Nature holidays are also in the top five for all seven countries. A tour scores highest amongst the Chinese, Dutch and Germans.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
Winter sports holiday	0%	1%	0%	0%	0%	1%	1%
Beach holiday	22%	25%	34%	27%	29%	16%	10%
Water sports holiday	1%	0%	1%	1%	0%	1%	1%
Walking holiday	4%	6%	5%	3%	2%	2%	0%
Cycling holiday	3%	1%	2%	1%	1%	1%	1%
Other type of active holiday	3%	2%	1%	1%	2%	3%	3%
Tour	6%	5%	6%	2%	4%	3%	10%
Cruise	1%	2%	2%	2%	4%	7%	1%
Visiting event	3%	2%	1%	2%	2%	4%	2%
City break	12%	9%	10%	10%	14%	10%	23%
Cultural holidays	4%	6%	4%	11%	5%	5%	10%
Visiting friends/family/etc	5%	7%	7%	8%	7%	14%	1%
Nature holiday	12%	10%	14%	14%	6%	8%	17%
Wellness holidays	3%	2%	4%	1%	3%	4%	0%
Holidays with friends/family/etc	13%	13%	3%	15%	15%	16%	2%
Culinary holidays	1%	1%	2%	0%	1%	1%	11%
Shopping holiday (shopping)	2%	2%	0%	1%	2%	1%	5%
Volunteer	0%	0%	0%	0%	0%	0%	1%
Otherwise	5%	3%	2%	2%	2%	4%	0%

Base: People with holiday plans for the next 12 months (booked or yet to book)
Highlighted: 5 highest scores per country

Question: How would you characterise your next holiday?

Type of holiday

On average, flexible cancellation conditions matter most when choosing a holiday destination (on average 73% consider this (very) important). This is followed by the aspect of staying in a quiet place (average 70%) and then the general political situation in a country (average 69%).

	Netherlands	Belgium	Germany	France	UK	USA	China
Flexible cancellation conditions	64%	69%	77%	73%	69%	74%	81%
Destination close to home	8%	8%	13%	13%	8%	10%	18%
Stay in quiet place	71%	78%	76%	80%	56%	58%	72%
Development of the war in Ukraine	40%	42%	48%	50%	42%	34%	66%
Evolution of the conflict in Israel and Palestinian territories	39%	43%	49%	48%	42%	35%	65%
Rising prices (fuel, energy, inflation)	54%	63%	66%	76%	62%	67%	74%
Crowds at airports	38%	42%	44%	46%	49%	47%	74%
Sustainability (minimising environmental impact)	41%	48%	53%	56%	46%	41%	79%
General political situation in a country	64%	64%	73%	75%	65%	60%	84%

Base: People with holiday plans for the next 12 months (booked or have yet to book).
Percentage: top 2 (very important + important).
Highlighted: the three highest scores of each country.

Question: How important are these aspects to you in your holiday destination choice?

Considerations for choice of holiday destination

People with holiday intentions in the next 12 months expect to spend their longest holidays mostly in July and August (20% and 21% on average). Amongst Americans, June is the most frequently chosen departure month for the longest holiday. Amongst Brits, this is September.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
January	1%	1%	1%	1%	1%	2%	0%
February	2%	1%	1%	1%	1%	1%	1%
March	1%	0%	1%	0%	2%	1%	4%
April	4%	3%	4%	2%	3%	4%	2%
May	8%	9%	9%	5%	8%	10%	17%
June	11%	14%	13%	13%	14%	**19%**	12%
July	21%	**27%**	19%	27%	15%	18%	13%
August	**22%**	18%	**22%**	**28%**	18%	15%	**22%**
September	18%	17%	18%	15%	**19%**	9%	6%
October	4%	4%	7%	3%	7%	7%	20%
November	2%	2%	2%	1%	4%	4%	2%
December	3%	1%	2%	2%	4%	6%	1%
I don't know yet	3%	4%	2%	3%	4%	6%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**%**

Base: People with holiday intentions in next 12 months (booked or have yet to book)
Highlighted: highest percentage by country

Question: In which month do you expect to spend your longest holiday in the next 12 months?
If the holiday falls in more than one month, select the month of departure.

Departure month: longest holiday

Dutch people living alone who have holiday intentions for the next 12 months expect to spend their longest holiday mostly in September. The same applies to Dutch people living with their partner. Dutch people living with their child(ren) (and partner) or Dutch people living with their parents both have July as their departure month for the longest holiday.

	I live alone	I live with my partner	I live with my child(ren) (and partner)	I live with my parents
January	3%	1%	0%	0%
February	1%	2%	1%	0%
March	1%	1%	2%	0%
April	5%	3%	4%	3%
May	7%	11%	5%	10%
June	11%	13%	9%	9%
July	14%	13%	35%	34%
August	17%	18%	29%	24%
September	24%	23%	10%	9%
October	5%	6%	1%	3%
November	5%	2%	2%	0%
December	3%	3%	1%	3%
I don't know yet	5%	3%	1%	3%
Total	**100%**	**100%**	**100%**	**100%**

Base: People with holiday intention in next 12 months (booked or have yet to book)
Highlighted: highest percentage by category

Question: In which month do you expect to spend your longest holiday in the next 12 months?
If the holiday falls in more than one month, select the month of departure.

Departure month: longest holiday vs living situation (NL)

Online travel companies and booking websites are used the most when choosing a next holiday destination (average 44%). This is followed by search engines (average 33%) and tips from friends/family/colleagues (average 28%). In China, social media (e.g. WeChat) is widely used, as are online travel companies / booking websites and websites with tips and reviews from others.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
AI / ChatGPT	2%	2%	4%	3%	2%	6%	8%
Review websites (e.g. TripAdvisor)	20%	16%	21%	20%	26%	23%	43%
Social media	12%	9%	11%	10%	17%	22%	61%
Search engine	30%	27%	32%	33%	34%	37%	38%
Online travel company/booking website	51%	43%	49%	38%	48%	29%	51%
Magazines/newspapers	8%	6%	13%	7%	12%	10%	21%
Friends/family/colleagues	21%	23%	27%	26%	28%	33%	41%
Travel blogs/websites	10%	10%	11%	10%	16%	18%	33%
Travel books/guides	11%	10%	9%	12%	16%	15%	24%
TV travel shows	6%	4%	12%	5%	12%	9%	19%
Discount/auction website	7%	7%	8%	5%	4%	4%	7%
Physical travel agency/tour operator	6%	14%	13%	11%	10%	8%	22%
Social travel website (e.g. Airbnb)	9%	10%	11%	14%	14%	15%	22%
From experience/already known	19%	14%	16%	10%	20%	19%	2%
I do not consult sources	6%	6%	5%	9%	4%	7%	0%
Other, namely...	2%	1%	1%	1%	1%	1%	0%

Base: everyone (entire sample)
Highlighted: 3 highest scores per country

Question: What sources of information do you normally use when choosing your next holiday destination? Multiple answers possible.

Information sources

Online travel companies / booking websites and search engines appear in the top three most used sources when choosing a holiday destination in all age groups. It is also notable that older age groups draw more on their own experiences than younger age groups. In particular, younger age groups use more social media and social travel websites (e.g. Airbnb) as sources of information.

	18-24 yrs	25-34 yrs	35-44 yrs	45-55 yrs	56-65 yrs	65+ yrs
AI / ChatGPT	2%	8%	3%	1%	1%	0%
Review websites (e.g. TripAdvisor)	30%	21%	28%	23%	15%	10%
Social media	19%	28%	21%	5%	4%	2%
Search engine	36%	42%	39%	27%	28%	15%
Online travel company/booking website	46%	54%	63%	48%	51%	41%
Magazines/newspapers	5%	9%	9%	9%	6%	7%
Friends/family/colleagues	32%	30%	31%	20%	10%	10%
Travel blogs/websites	15%	19%	12%	6%	10%	4%
Travel books/guides	10%	12%	13%	11%	11%	9%
TV travel shows	7%	8%	10%	5%	4%	4%
Discount/auction website	11%	16%	9%	5%	2%	1%
Physical travel agency/tour operator	5%	3%	5%	6%	9%	5%
Social travel website (e.g. Airbnb)	22%	17%	13%	5%	2%	4%
From experience/already known	8%	9%	9%	22%	24%	31%
I do not consult sources	3%	4%	4%	6%	6%	9%
Other, namely...	1%	1%	1%	3%	3%	3%

Base: everyone (entire sample)
Highlighted: 3 highest scores per age group

Question: What sources of information do you normally use when choosing your next holiday destination? Multiple answers possible.

Information sources vs age (NL)

On average, 22% expect corona to influence their choice of holiday destination by 2024. In Western countries, the score is between 13% and 19%, while in China it is 61%. This could be explained by the fact that corona measures were in place in China for a longer time than in Europe. As a result, people in China may take corona into account more than other countries do.

I expect corona to influence my choice of holiday destination in 2024

Top 2

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Apr '24	Mar '23
🇳🇱	3%	10%	15%	28%	42%	2%	**13%**	**14%**
🇧🇪	3%	10%	21%	28%	34%	3%	**14%**	**20%**
🇩🇪	5%	11%	16%	26%	40%	3%	**15%**	**19%**
🇫🇷	4%	12%	22%	25%	35%	3%	**16%**	**21%**
🇬🇧	5%	13%	17%	29%	33%	4%	**17%**	**27%**
🇺🇸	5%	15%	16%	26%	36%	2%	**19%**	**31%**
🇨🇳	21%	40%	23%	10%	6%		**61%**	**-**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

Influence of corona on choice of holiday destination
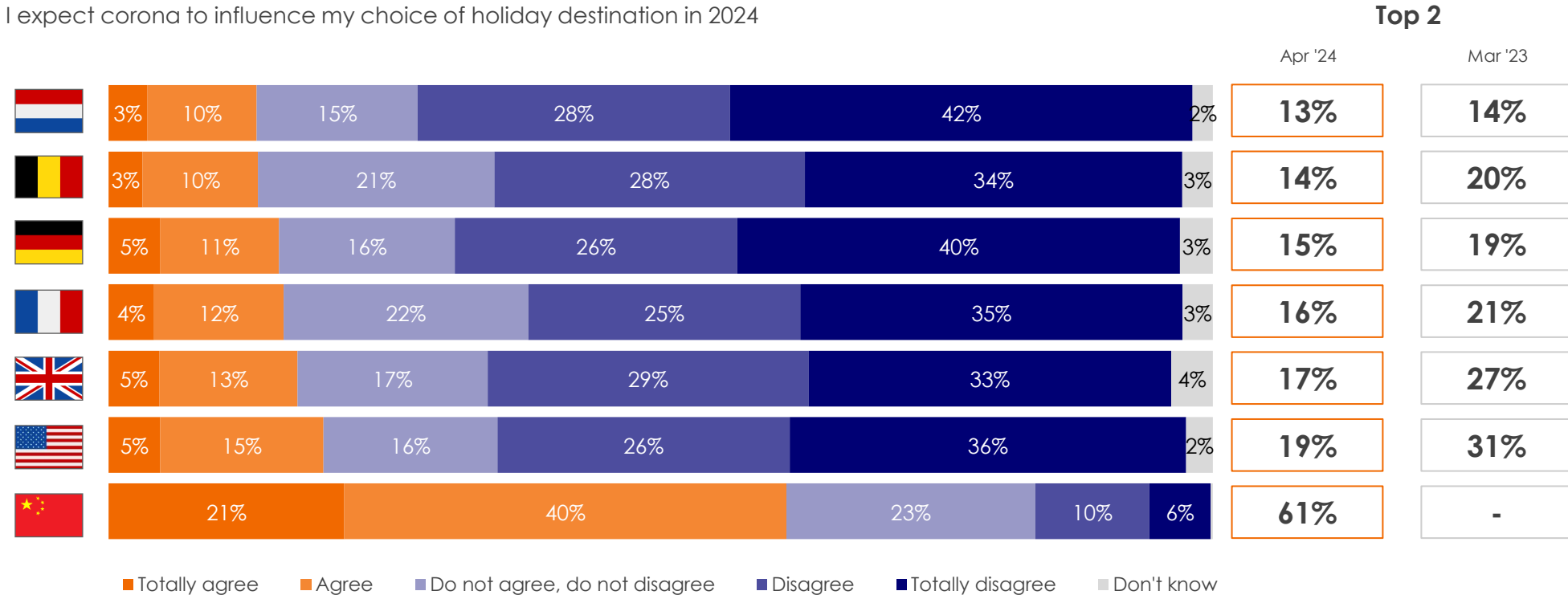
On average, 34% are looking at alternative travel options for their holidays because of possible crowding at airports. A year ago, this was 30%. Amongst the Chinese, this score is noticeably higher than for other countries.

Due to possible crowding at airports, I am looking at alternative travel options for my holiday

Top 2

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Apr '24	Mar '23
🇳🇱	8%	20%	26%	22%	21%	3%	**28%**	**32%**
🇧🇪	8%	21%	30%	20%	16%	4%	**29%**	**27%**
🇩🇪	10%	21%	26%	21%	20%	2%	**31%**	**34%**
🇫🇷	9%	22%	26%	21%	18%	5%	**31%**	**28%**
🇬🇧	9%	21%	24%	27%	18%	2%	**30%**	**26%**
🇺🇸	9%	23%	23%	23%	21%	%	**32%**	**35%**
🇨🇳	18%	38%	24%	13%	6%		**57%**	**-**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

Crowds at airports
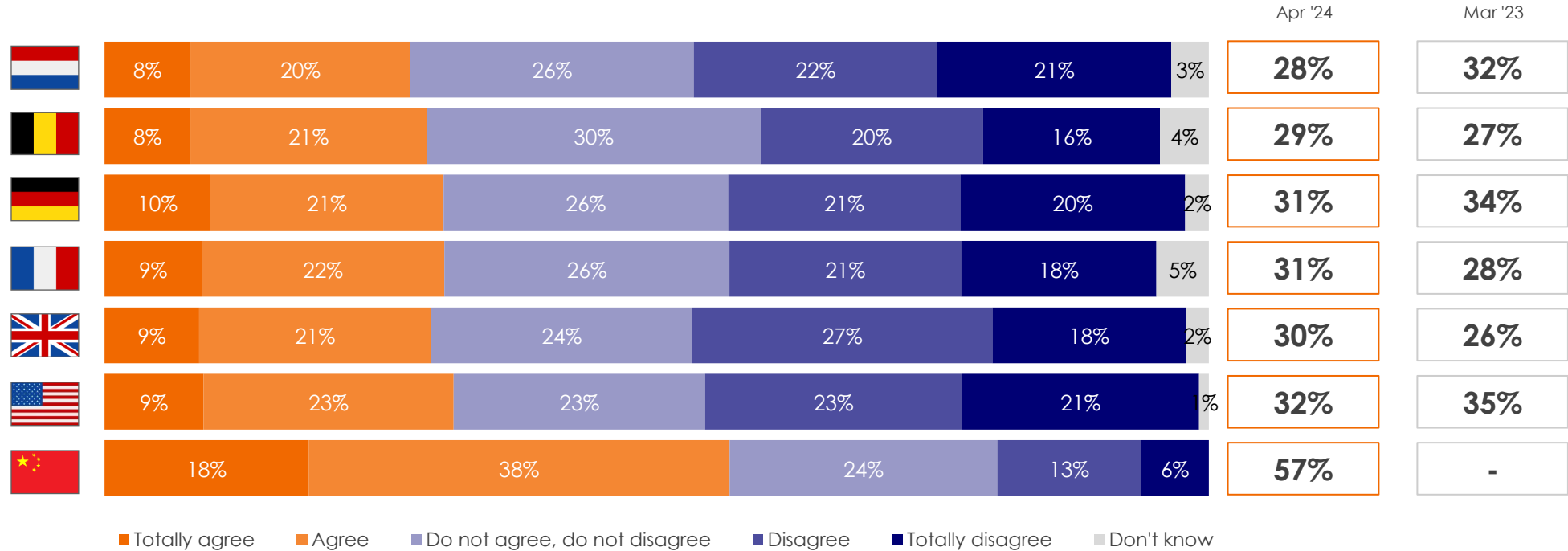
About half (51%) of those surveyed (fully) agree with the statement 'I think it is important to consider the environment when booking my holiday'. This average is similar to a year ago. Of the six countries below, Dutch people agree with this statement the least (37%) and Chinese the most (68%).

I think it is important to consider the environment when booking my holiday
(e.g. choice of means of transport, destination, accommodation)

Top 2

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Apr '24	Mar '23
🇳🇱	10%	27%	34%	17%	11%	%	**37%**	**38%**
🇧🇪	10%	34%	36%	11%	7%	2%	**44%**	**43%**
🇩🇪	12%	33%	32%	12%	9%	1%	**45%**	**46%**
🇫🇷	15%	42%	26%	9%	7%	2%	**57%**	**57%**
🇬🇧	15%	38%	28%	12%	7%	%	**52%**	**52%**
🇺🇸	14%	37%	26%	13%	8%	2%	**51%**	**49%**
🇨🇳	21%	47%	21%	7%	4%		**68%**	**-**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know
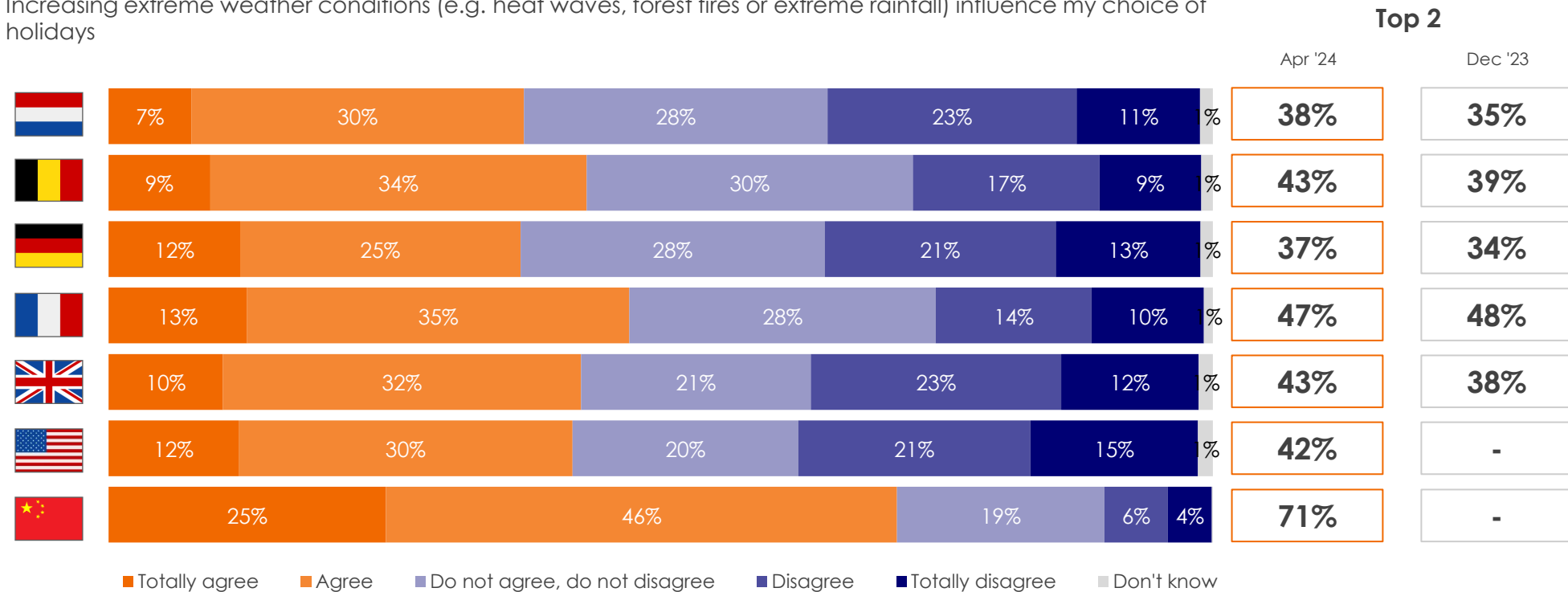
Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

Sustainability
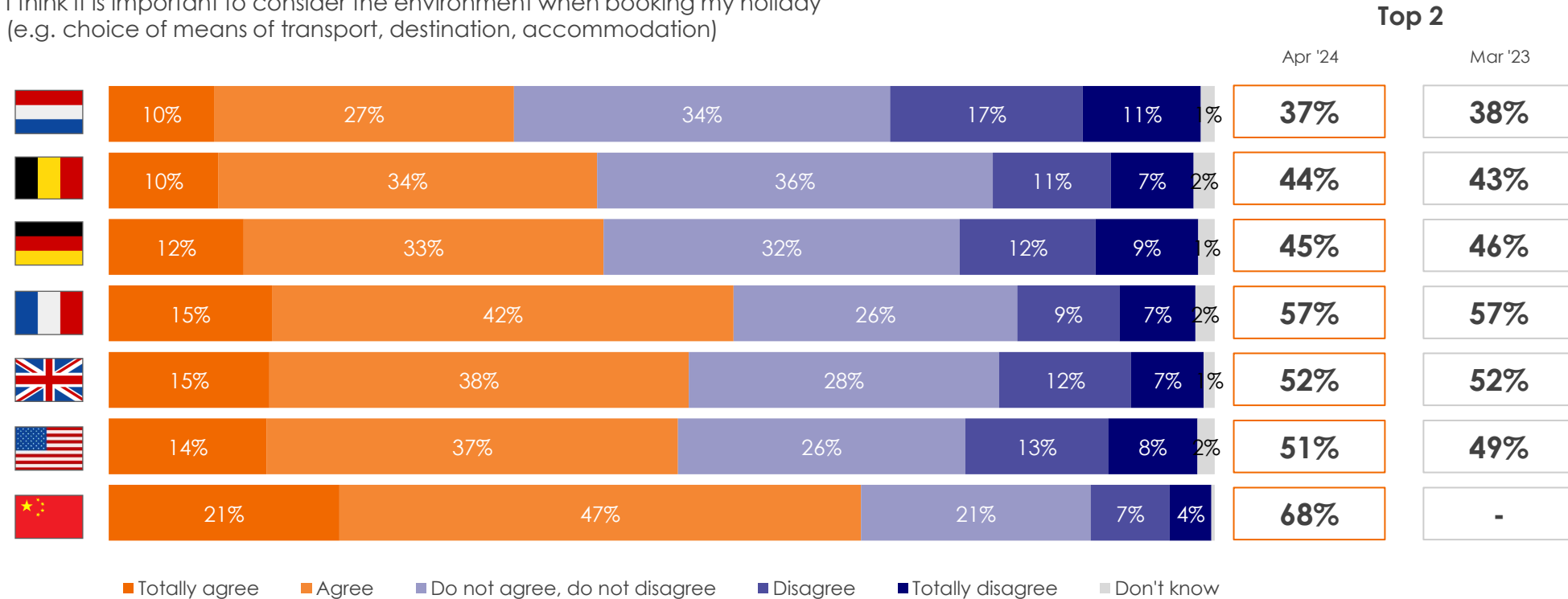
An average of 46% of those surveyed (fully) agree with the statement that increasing extreme weather conditions influence holiday choices. Chinese agree most strongly with this. Among Dutch people, 38% now agree with the statement, in December '23 it was 35% and at the end of August '23 it was 44%.

Increasing extreme weather conditions (e.g. heat waves, forest fires or extreme rainfall) influence my choice of holidays

		Top 2	
		Apr '24	Dec '23
🇳🇱	7% · 30% · 28% · 23% · 11% · %	**38%**	**35%**
🇧🇪	9% · 34% · 30% · 17% · 9% · %	**43%**	**39%**
🇩🇪	12% · 25% · 28% · 21% · 13% · %	**37%**	**34%**
🇫🇷	13% · 35% · 28% · 14% · 10% · %	**47%**	**48%**
🇬🇧	10% · 32% · 21% · 23% · 12% · %	**43%**	**38%**
🇺🇸	12% · 30% · 20% · 21% · 15% · %	**42%**	**-**
🇨🇳	25% · 46% · 19% · 6% · 4%	**71%**	**-**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

As a result of increasing extreme weather conditions, people most often adjust the period when they go on holiday (51% on average). This is followed by adjusting the destination (average 38%). Amongst the Dutch, adjusting the destination is in first place. Brits and Americans adapt the most by paying extra attention to conditions and insurance when booking a holiday.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
I adjust my destination	52%	30%	49%	27%	17%	21%	59%
I adjust my holiday period	43%	54%	51%	66%	31%	25%	68%
I book more last-minute	18%	19%	17%	16%	27%	22%	22%
I pay extra attention to conditions and insurance	19%	19%	22%	19%	44%	46%	32%
Other, namely	3%	2%	0%	2%	3%	5%	0%

Base: people who agree with the statement that increasing extreme weather conditions influence holiday choices.
Highlighted: highest score per country.

Question: How are increasing extreme weather conditions affecting your holiday choices? Multiple answers possible.

Extreme weather 2/2

30% of those surveyed say the war in Ukraine affects their choice of holiday destination. China has a much higher score than average in this regard. When China is excluded, the average is 25%; in December '23, it was 23%. Americans agree least with this statement.

The war in Ukraine affects my holiday destination choice

Top 2

		Apr '24	Dec '23
🇳🇱	6% / 19% / 23% / 28% / 23% / 2%	**24%**	**19%**
🇧🇪	8% / 19% / 26% / 21% / 24% / 2%	**26%**	**24%**
🇩🇪	9% / 18% / 22% / 23% / 27% / 1%	**27%**	**24%**
🇫🇷	8% / 19% / 25% / 20% / 25% / 2%	**28%**	**24%**
🇬🇧	7% / 20% / 20% / 26% / 24% / 2%	**28%**	**25%**
🇺🇸	6% / 13% / 20% / 25% / 34% / 2%	**19%**	**21%**
🇨🇳	25% / 36% / 22% / 10% / 7%	**60%**	**-**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know
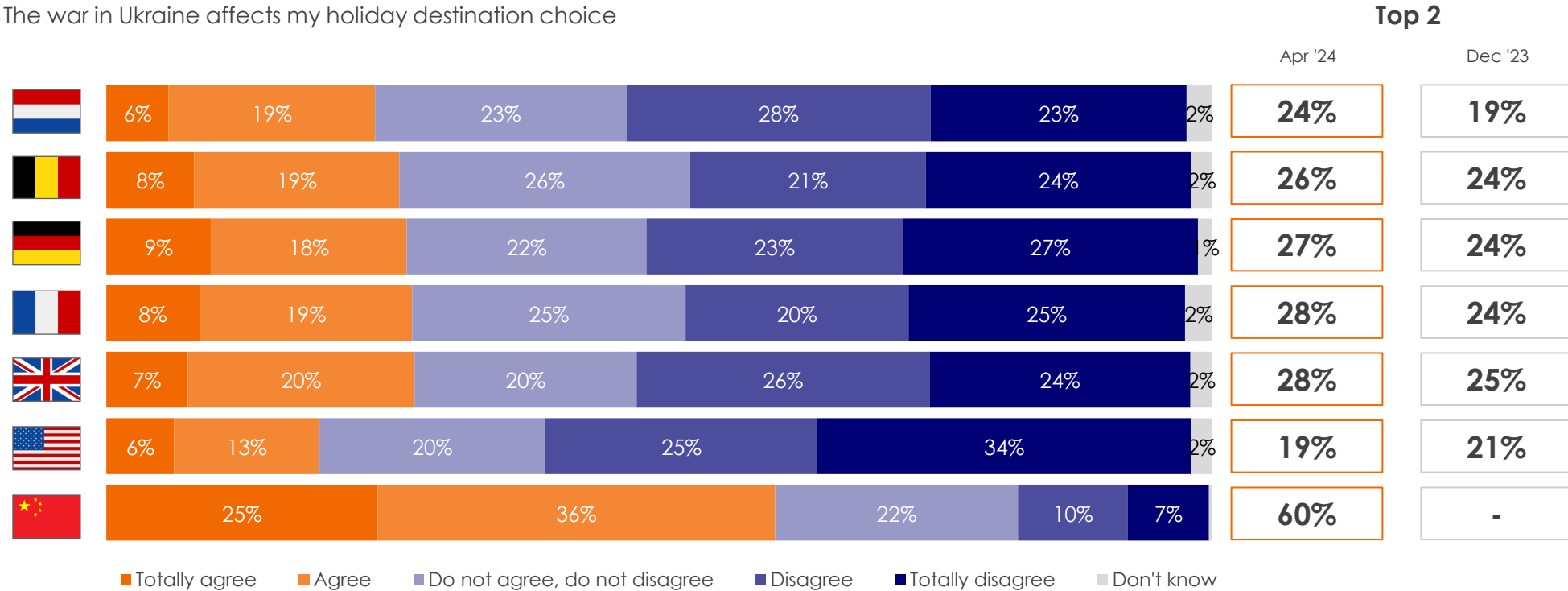
Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

**31% of those surveyed indicated that the conflict in Israel and the Palestinian territories affects their choice of holiday destination. The top 2 scores currently range from 20% among Americans to 59% amongst the Chinese. For some countries, the conflict in Israel and Palestinian territories played a bigger role compared to December '23; these are mainly Belgium and the UK.**

The conflict in Israel and the Palestinian territories affects my holiday destination choice

Top 2

							Apr '24	Dec '23
🇳🇱	6%	17%	24%	27%	25%	2%	**22%**	**20%**
🇧🇪	8%	20%	23%	22%	25%	2%	**29%**	**25%**
🇩🇪	9%	20%	23%	23%	23%	2%	**29%**	**26%**
🇫🇷	10%	19%	25%	21%	23%	3%	**28%**	**28%**
🇬🇧	8%	20%	21%	25%	24%	2%	**28%**	**24%**
🇺🇸	7%	13%	20%	25%	32%	2%	**20%**	**22%**
🇨🇳	22%	37%	21%	12%	8%		**59%**	**-**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.
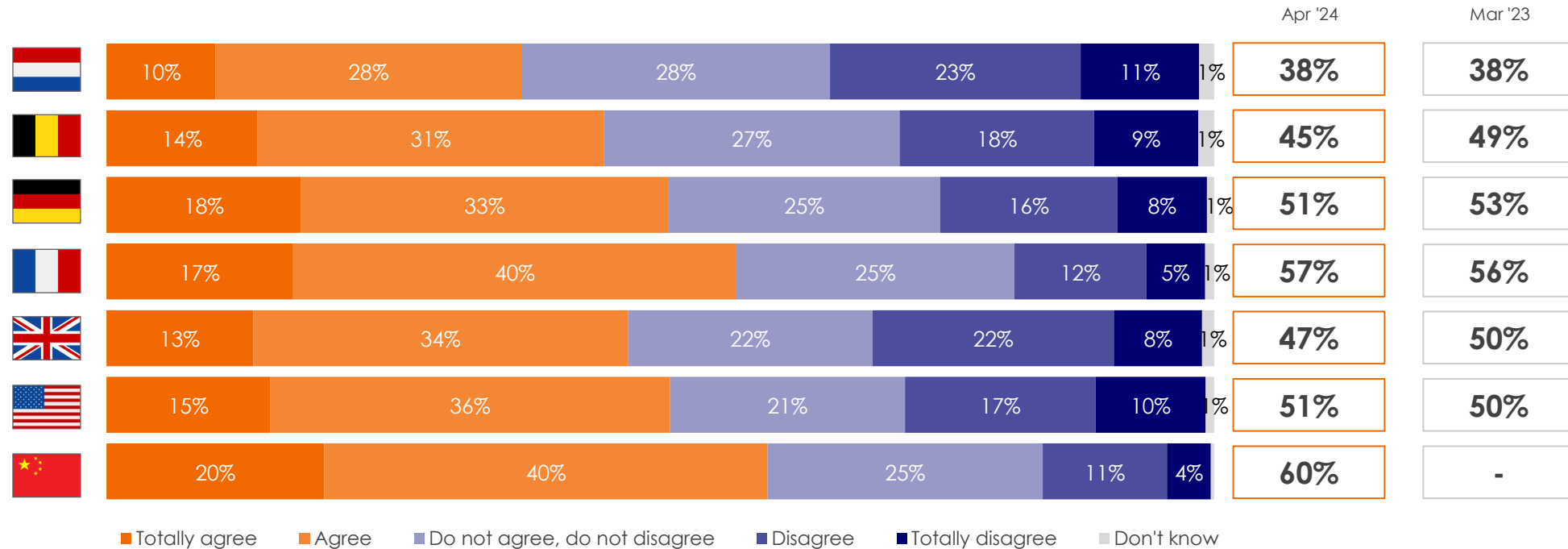
Israel and the Palestinian territories
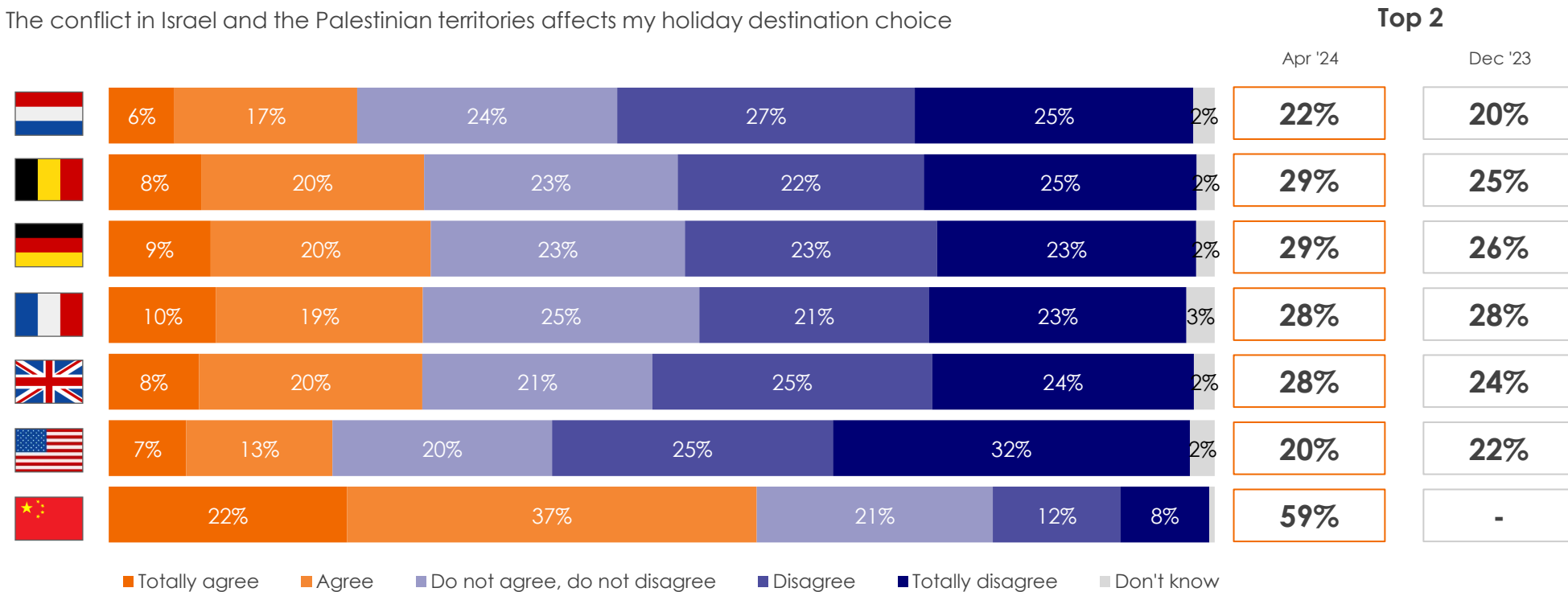
2. Influence of rising prices on holiday plans

On average 50% of all respondents said they were forced to adjust their holiday behaviour as a result of rising prices. A year ago, this was almost the same (49% on average). The Dutch still identify least with the statement (38%) and the Chinese and French identify with it the most (60% and 57% respectively).

Rising prices (fuel, gas/energy, groceries, etc.) have forced me to adjust my holiday behaviour

Top 2

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Apr '24	Mar '23
🇳🇱	10%	28%	28%	23%	11%	1%	**38%**	**38%**
🇧🇪	14%	31%	27%	18%	9%	1%	**45%**	**49%**
🇩🇪	18%	33%	25%	16%	8%	1%	**51%**	**53%**
🇫🇷	17%	40%	25%	12%	5%	1%	**57%**	**56%**
🇬🇧	13%	34%	22%	22%	8%	1%	**47%**	**50%**
🇺🇸	15%	36%	21%	17%	10%	1%	**51%**	**50%**
🇨🇳	20%	40%	25%	11%	4%		**60%**	**-**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

Rising prices

In April 2024, people indicated that if they change their holiday behaviour (due to higher prices), they will do so mainly by going on holiday less often (average 42%) and/or choosing cheaper accommodation/lodging (average 40%). Interestingly, the Chinese are actually opting for cheaper transport. Furthermore, Dutch people now indicate to a higher extent that they avoid the high season compared to about a year ago.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸	🇨🇳
Shorter holidays	29% (26%)	28% (28%)	26% (24%)	30% (28%)	30% (30%)	35% (34%)	24% (-)
Less frequent holidays	45% (42%)	46% (43%)	47% (48%)	42% (40%)	49% (51%)	46% (44%)	26% (-)
Cheaper accommodation/lodging	41% (39%)	35% (40%)	47% (41%)	39% (39%)	44% (40%)	41% (38%)	36% (-)
Cheaper transport	16% (16%)	16% (18%)	17% (13%)	18% (25%)	16% (19%)	25% (25%)	55% (-)
Save at destination itself	29% (29%)	22% (28%)	28% (29%)	31% (35%)	25% (28%)	29% (29%)	27% (-)
Avoiding the high season	27% (19%)	26% (27%)	20% (25%)	21% (21%)	26% (26%)	26% (23%)	25% (-)
Other, namely	2% (5%)	3% (4%)	3% (2%)	1% (2%)	1% (3%)	2% (3%)	0% (-)

Base: People who (fully) agree with the statement 'Due to rising prices (fuel, gas/energy, groceries, etc.) I am forced to adjust my holiday behaviour'.
Highlighted: the highest score from each country.
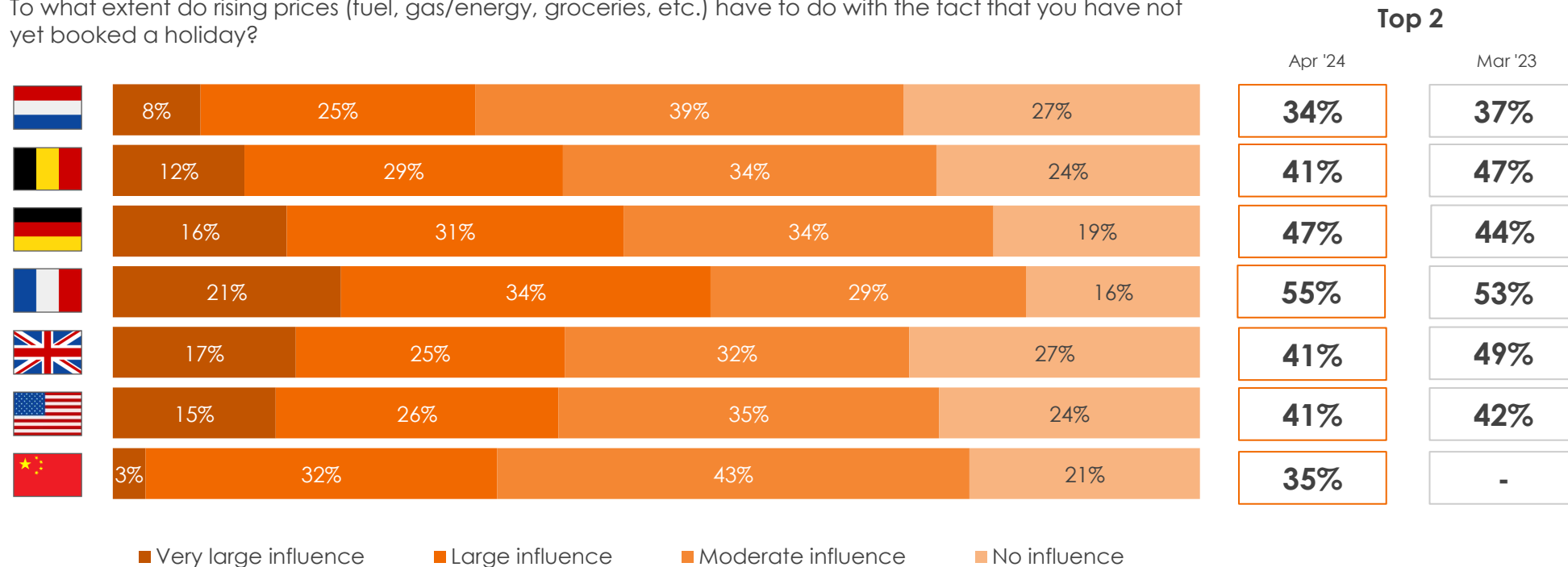In brackets: the March 2023 scores.

Question: In what ways do you mainly adjust your holiday behaviour as a result of rising prices? Multiple answers possible (max. 3).

Holiday behaviour adjustment

Of those who have holiday intentions but have not yet booked, 42% on average say that rising prices have a (very) big influence on this. A year ago, this was 45% on average. The top 2 scores currently range from 34% and 35% amongst the Dutch and Chinese, to 55% amongst the French.

To what extent do rising prices (fuel, gas/energy, groceries, etc.) have to do with the fact that you have not yet booked a holiday?

Top 2

	Very large influence	Large influence	Moderate influence	No influence	Apr '24	Mar '23
🇳🇱	8%	25%	39%	27%	**34%**	**37%**
🇧🇪	12%	29%	34%	24%	**41%**	**47%**
🇩🇪	16%	31%	34%	19%	**47%**	**44%**
🇫🇷	21%	34%	29%	16%	**55%**	**53%**
🇬🇧	17%	25%	32%	27%	**41%**	**49%**
🇺🇸	15%	26%	35%	24%	**41%**	**42%**
🇨🇳	3%	32%	43%	21%	**35%**	**-**

■ Very large influence ■ Large influence ■ Moderate influence ■ No influence

Influence of prices if not yet booked

On average, 56% of people without holiday plans say that rising prices play a (very) big role in this. A year ago, this was similar (54%). Amongst the Belgians and French, the influence of higher prices is greater now than a year ago.

To what extent are rising prices (fuel, gas/energy, groceries, etc.) related to the fact that you have no holiday plans at all for the next 12 months?

Top 2

	Very large influence	Large influence	Moderate influence	No influence	Apr '24	Mar '23
🇳🇱	22%	26%	25%	28%	**48%**	**49%**
🇧🇪	32%	26%	20%	22%	**57%**	**52%**
🇩🇪	38%	21%	21%	20%	**60%**	**62%**
🇫🇷	37%	32%	12%	19%	**69%**	**59%**
🇬🇧	34%	22%	13%	31%	**56%**	**53%**
🇺🇸	28%	20%	26%	26%	**48%**	**49%**
🇨🇳	20%	80%			**20%***	**-**

■ Very large influence   ■ Large influence   ■ Moderate influence   ■ No influence
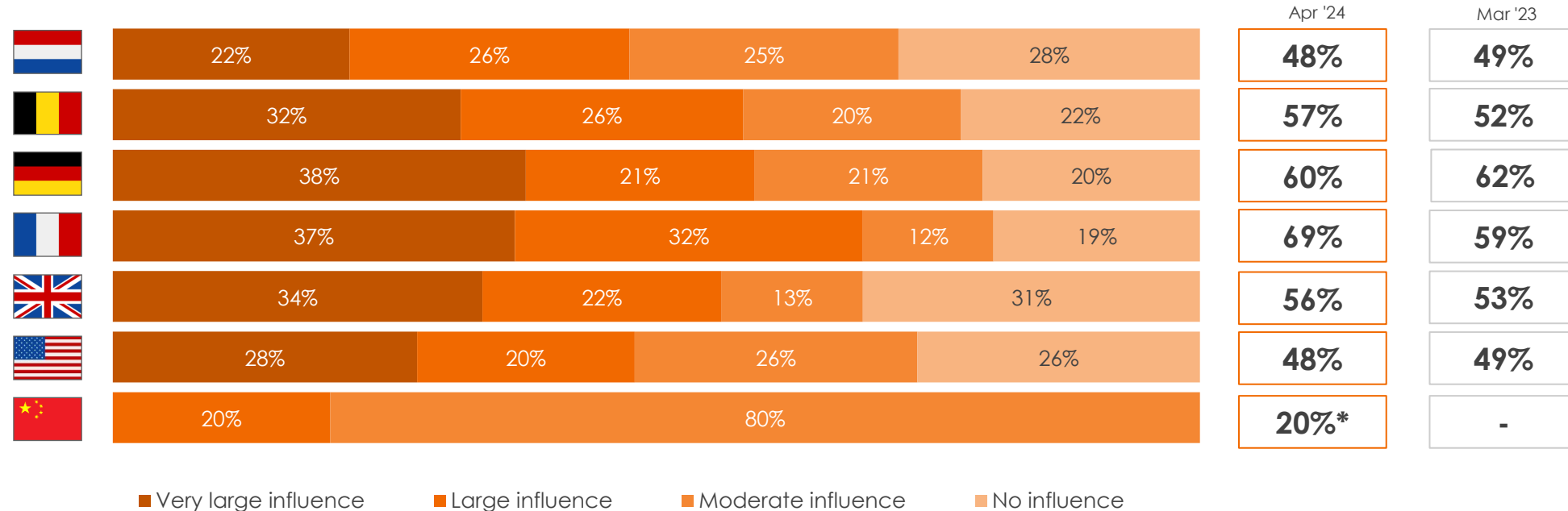
Base: People who currently have no holiday intention in the next 12 months
Rounding differences may occur at the top 2%.
* Small proportion (Chinese) answered this statement.

Question: To what extent are rising prices (fuel, gas/energy, groceries, etc.) related to the fact that you have no holiday plans at all for the next 12 months?
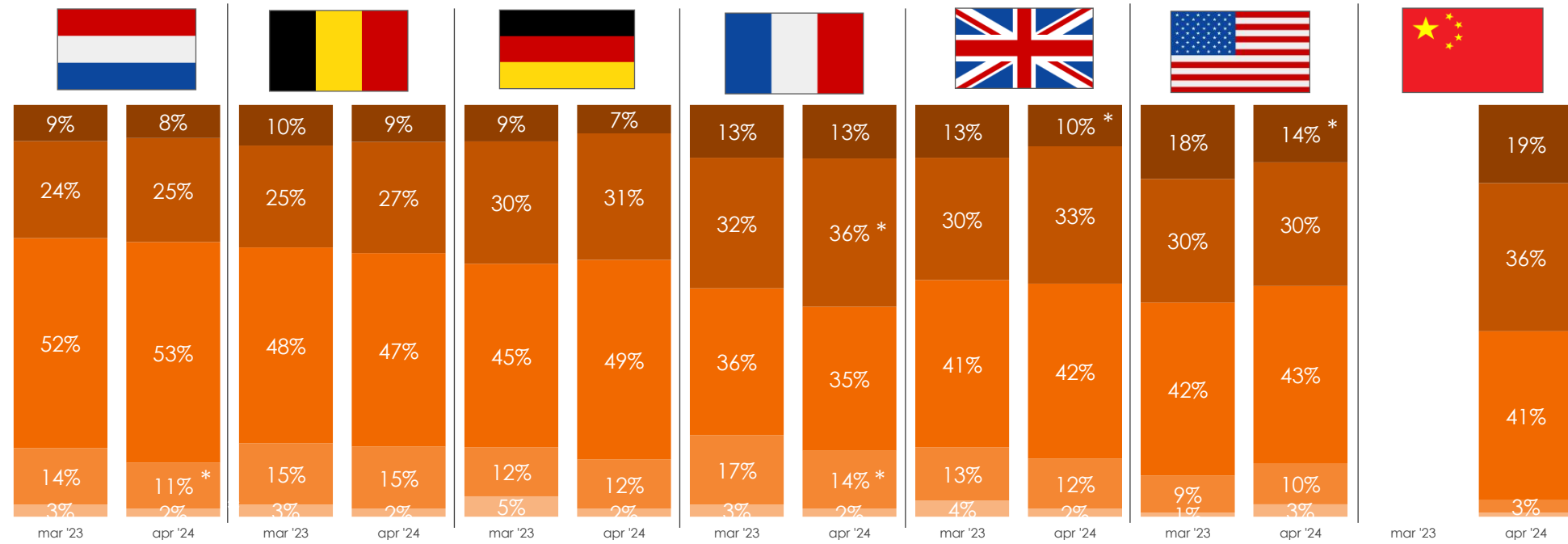
Influence of prices if no holiday plans

Of those with a holiday intention for the next 12 months, on average 44% say they have a similar holiday budget for their next holiday as in previous years. A year ago, this was also 44%. Furthermore, on average 31% say they will have a slightly higher budget (a year ago this was 28%). In China, the group that indicates having a slightly or much higher budget than in previous years is the largest of all 7 countries.

The holiday budget for my next holiday is....

	mar '23	apr '24	mar '23	apr '24	mar '23	apr '24	mar '23	apr '24	mar '23	apr '24	mar '23	apr '24	mar '23	apr '24

Netherlands mar '23: 9%, 24%, 52%, 14%, 3%
Netherlands apr '24: 8%, 25%, 53%, 11% *, 2%
Belgium mar '23: 10%, 25%, 48%, 15%, 3%
Belgium apr '24: 9%, 27%, 47%, 15%, 2%
Germany mar '23: 9%, 30%, 45%, 12%, 5%
Germany apr '24: 7%, 31%, 49%, 12%, 2%
France mar '23: 13%, 32%, 36%, 17%, 3%
France apr '24: 13%, 36% *, 35%, 14% *, 2%
UK mar '23: 13%, 30%, 41%, 13%, 4%
UK apr '24: 10% *, 33%, 42%, 12%, 2%
US mar '23: 18%, 30%, 42%, 9%, 1%
US apr '24: 14% *, 30%, 43%, 10%, 3%
China apr '24: 19%, 36%, 41%, 3%

Legend: ■ Much lower ■ Lower ■ Similar ■ Slightly higher ■ Much higher

Base: People with holiday plans for the next 12 months (booked or yet to book)

Question: Which situation is most applicable to you?

Holiday budget

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Annex

Element	Description
Method:	Online
Target audience:	0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA 11-measurement: NL/BE/DE/FR/UK/USA 2-measurement: NL/BE/DE/UK 12-measurement: NL/BE/DE/FR/UK/USA 3-measurement: NL/BE/DE/FR/UK/USA/CHINA 13-measurement: NL/BE/DE/FR/UK/USA 4-measurement: NL/BE/DE/UK 14-measurement: NL/BE/DE/FR/UK/USA 5-measurement NL/BE/DE/FR/UK/USA/CHINA 15-measurement: NL/BE/DE/FR/UK/USA 6-measurement: NL/BE/DE/FR/UK/USA/CHINA 16-measurement: NL/BE/DE/FR/UK/USA (+CHINA) 7-measurement: NL/BE/DE/FR/UK/USA/CHINA 17-measurement: NL/BE/DE/FR/UK/USA 8-measurement: NL/BE/DE/FR/UK/USA/CHINA 18-measurement: NL/BE/DE/FR/UK/USA 9-measurement: NL/BE/DE/FR/UK/USA/CHINA 19-measurement: NL/BE/DE/FR/UK/USA/CHINA* 10-measurement: NL/BE/DE/FR/UK/USA/CHINA
Sample source:	Consumer panel of Dynata (except the 16-measurement in China, which was via WeChat)
Sample size:	Net n=1,000 by country, 18+ nationally representative by age, gender and region. *For China, the 19 measurement focused on major cities in Tier 1 and 2.
Fieldwork period:	0 measurement: 21 May to 1 Jun 2020 11-measurement: 31 Mar to 6 Apr 2022 1 measurement: 17 Jun to 26 Jun 2020 12-measurement: 13 Jun to 21 Jun 2022 2-measurement: 24 Jul / 28 Jul 2020 13-measurement: 2 Sep to 8 Sep 2022 3 measurement: 7 Sep to 18 Sep 2020 14-measurement: 5 Dec to 9 Dec 2022 4-measurement: 27 Oct to 1 Nov 2020 15-measurement: 9 Mar to 14 Mar 2023 5-measurement: 7 Jan to 13 Jan 2021 16-measurement: 1 Jun to 7 Jun 2023 6-measurement: 18 Mar to 23 Mar 2021 17-measurement: 25 Aug to 31 Aug 2023 7-measurement: 19 May to 25 May 2021 18-measurement: 1 Dec to 8 Dec 2023 8-measurement: 1 Jul to 6 Jul 2021 19-measurement: 2 Apr to 8 Apr 2024 9-measurement: 1 Sep to 7 Sep 2021 10-measurement: 15 Nov to 21 Nov 2021

Research justification