

# Holiday Sentiment Monitor

January 2026



# Contents



1. Holiday intentions	5
2. Planning and booking	11
3. Destination and length of stay	22
4. Holiday characteristics	32
5. Sentiment	39
6. Influence of prices	46
7. Appendix	55

# Takeaways

- 1. Holiday intentions for the new year remain stable among Dutch, German and Spanish people.**

On average, 88% of respondents intend to go on holiday in 2026. A year ago, an average of 90% had holiday intentions for 2025. Among Dutch, German and Spanish people, holiday intentions are similar to a year ago. Among Belgians, British and Americans, these intentions have declined. This may involve short or long holidays, at home or abroad.
- 2. Dutch people who intend to go on holiday expect to take two to three holidays in 2026.**

Respondents from six countries who have holiday intentions for 2026 indicate that they want to take an average of 2.6 holidays this year. A year ago, this average was the same. The average for 2026 is highest among Americans (2.9) and lowest among Dutch, Belgians and Germans (all three 2.4). People who intend to take a holiday in 2026 expect to spend their longest holiday of the year in July and August (19% and 17% on average). This is followed by June and May (14% and 11% on average). This is similar to the results from a year ago.
- 3. 33% have already booked a holiday, with many people leaving in the first months of 2026.**

The proportion who have already booked a holiday is almost the same as a year ago (avg. 34% at that time). The British have the highest proportion of 'already booked' (38%), but this has fallen compared to a year ago. The Belgians have the lowest proportion of 'already booked' (27%). Three-quarters of those who have already booked indicate that their next holiday will take place in the first half of 2026 (January-June). Of that 75%, 39% will depart in the first quarter and 36% in the second quarter.
- 4. Market potential: 55% of respondents intend to take a holiday but have yet to book. Of these, more than half are already exploring their options.**

55% of respondents indicate that they still need to book, but do have holiday intentions for 2026. Of that group, 57% are already exploring their options. They are mostly focusing on the months of May and July (both 15% on average), followed by April (14% on average) and June (13% on average). Of this group that is already researching holidays, the largest group plans to book within 1 to 3 months (average 43%). If people have holiday plans but are not yet researching, it is mainly because they have not had time to do so (average 29%).
- 5. 23% of Dutch holidaymakers are choosing their own country for their next holiday.**

This is comparable to a year ago (when it was 21%). Dutch people are also travelling to destinations (elsewhere) in Europe to the same extent (58%). In addition, 15% of Dutch holidaymakers are making plans for an intercontinental trip as their next holiday. No shifts in terms of holiday destination/continent are visible in the other markets surveyed. Belgians spend the least amount of their holiday in their own country, while Spaniards and Americans spend the most. Finally, it is interesting that Dutch solo travellers are choosing Asia to a greater extent, at the expense of North/South America and Europe.



## Takeaways

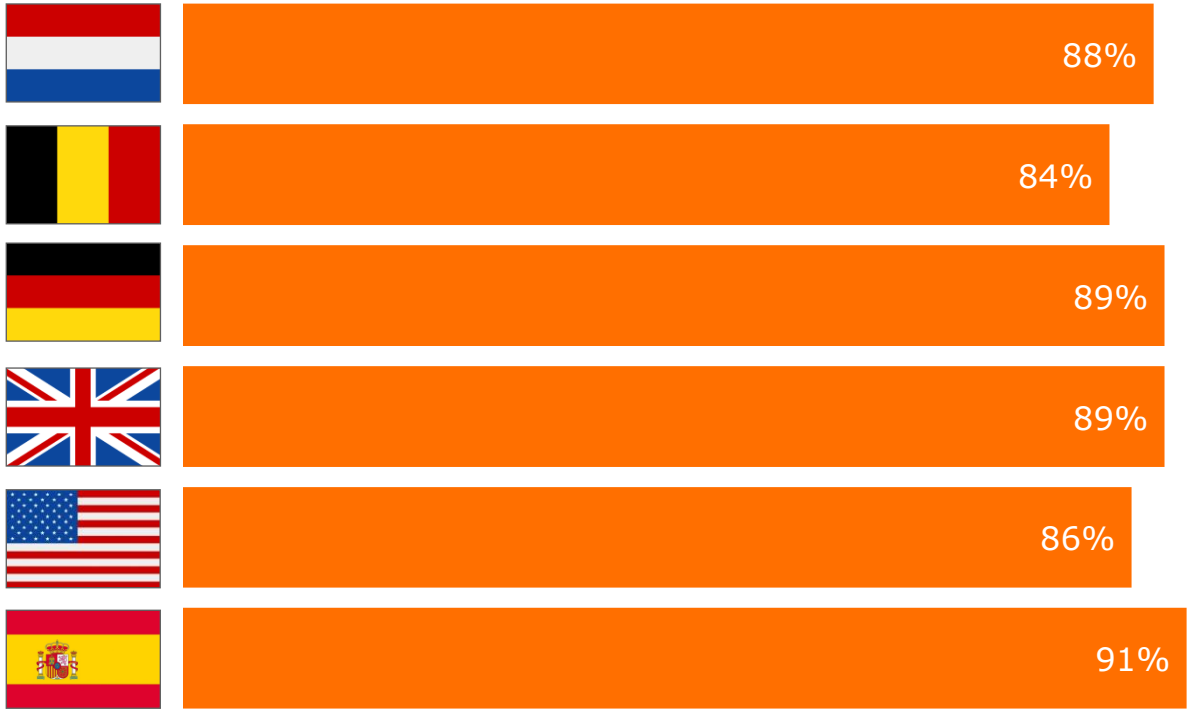
- 6. Limburg and Gelderland are the most popular destinations for holidays in the Netherlands. Domestic holidays usually last 4-7 nights.**  
Dutch people who want to spend their next holiday in 2026 in the Netherlands indicate that they most want to do so in Limburg and Gelderland (15% and 14% respectively). A year ago, these provinces also made up the top two. They are followed by Noord-Holland (13%) and Drenthe (11%). The majority (53%) spend 4-7 nights away in their own country. Approximately a quarter (23%) also spend 1-3 nights away. When holidaying elsewhere in Europe, Dutch people often go away for 8-14 nights (41%), and 4-7 nights is also common (37%). Of the Dutch people who want to spend their longest holiday of 2026 in the Netherlands, a relatively large proportion are aged 65 or older (24%).
- 7. Air travel remains the most popular choice for European holidays.**  
Air travel is the most popular means of transport for the next holiday in Europe (average 59%). This proportion is highest among British and Spanish people (both 83%). In general, the choice of transport is similar to a year ago. Among Dutch, Belgian and German people, the car also scores relatively high. This year, German holidaymakers are considering travelling by train more than a year ago. Note: this concerns means of transport excluding domestic holidays.
- 8. Spain is the favourite European holiday destination for Dutch, German and British people.**  
Among Dutch, German and British people, Spain is at the top of the top 5 European holiday destinations (excluding their own country) by a wide margin. Among Belgians, France is the favourite holiday country, followed by Spain. The Netherlands shares fifth place with Austria and Portugal among Belgians. That position is now less strong than a year ago. Regarding Germany, the Netherlands is in sixth place, just like last year. In addition to Spain, Italy, France and Greece are also popular holiday destinations.
- 9. About half of those surveyed avoid certain holiday destinations because of overtourism.**  
On average, 51% of respondents avoid certain holiday destinations because of negative reports about overtourism. This is most prevalent among the Spanish: 59% agree (completely) with the statement. Among Dutch and Americans, this is lowest (46% and 47% respectively), but still a significant proportion.
- 10. Holiday behaviour is more often adjusted due to rising prices. The Netherlands and Belgium score well in terms of value for money.**  
Prices also play an important role. On average, 50% of all respondents indicate that they are adjusting their holiday behaviour as a result of rising prices. This is more than a year ago, when the average was 47%. The most popular cost-saving measures are choosing cheaper accommodation/stays and/or going on holiday less often. More Belgians and Germans are also choosing to save money at the destination itself, for example by eating out less often. In general, accommodation in the United Kingdom is perceived as relatively expensive with a poor price-quality ratio, while the Netherlands and Belgium are most often ranked number one in terms of price-quality.





# 1. Holiday intentions

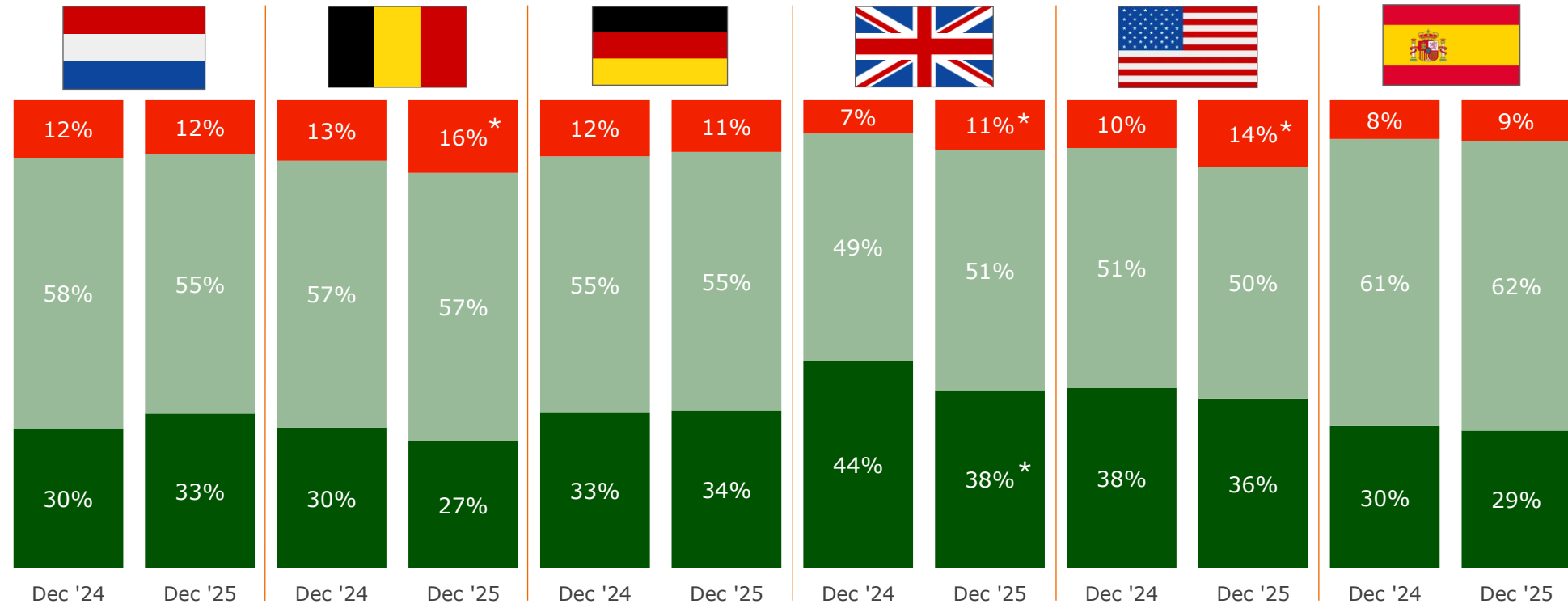
Holiday intentions for 2026 are highest among the Spanish (91%) and lowest among Belgians (84%). On average, 88% of respondents from the six countries below intend to go on holiday in 2026, some of whom have already booked and some of whom have yet to book. This may be a short or long holiday at home or abroad. A year ago, an average of 90% had holiday intentions for 2025.



Holiday intentions for 2026 (% top 2):

- Yes, I have already booked
- Yes, but I still need to book

On average, 33% have already booked a holiday for 2026. A year ago, the average for the six countries shown below was 34%. The British currently have the highest proportion of 'already booked' (38%), but this has fallen compared to a year ago. Among Belgians, British and Americans, the proportion who have no holiday plans for the new year has increased.



■ Yes, already booked

■ Yes, still need to book

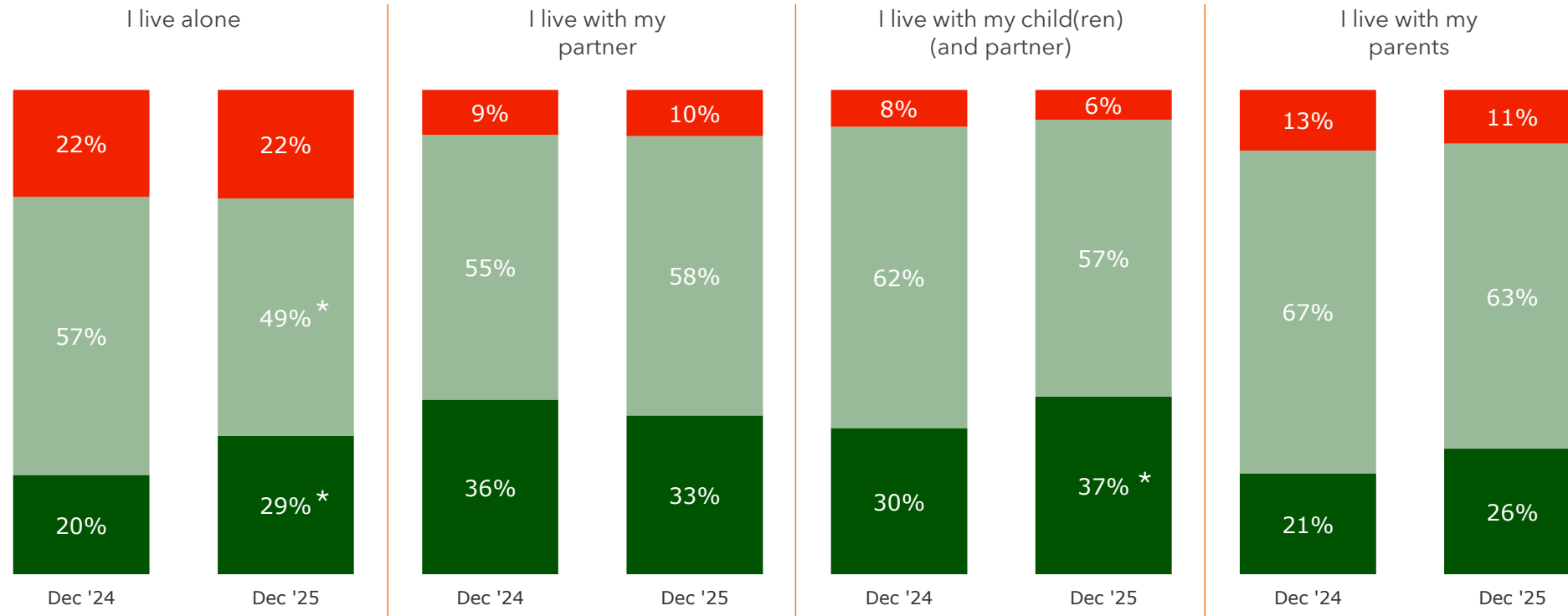
■ No, no intention

Basis: everyone (entire sample)

\*: significant difference compared to the measurement taken 1 year ago

Question: Do you currently intend to go on holiday sometime in 2026?  
(in the December 2024 measurement, this concerned a holiday in 2025)

Dutch people who live with child(ren) (and partner) are the most likely to have already booked a holiday for 2026 (37%). This is an increase compared to a year ago (when it was 30%). Holiday intentions have also increased significantly among Dutch people who live alone.



■ Yes, already booked

■ Yes, still need to book

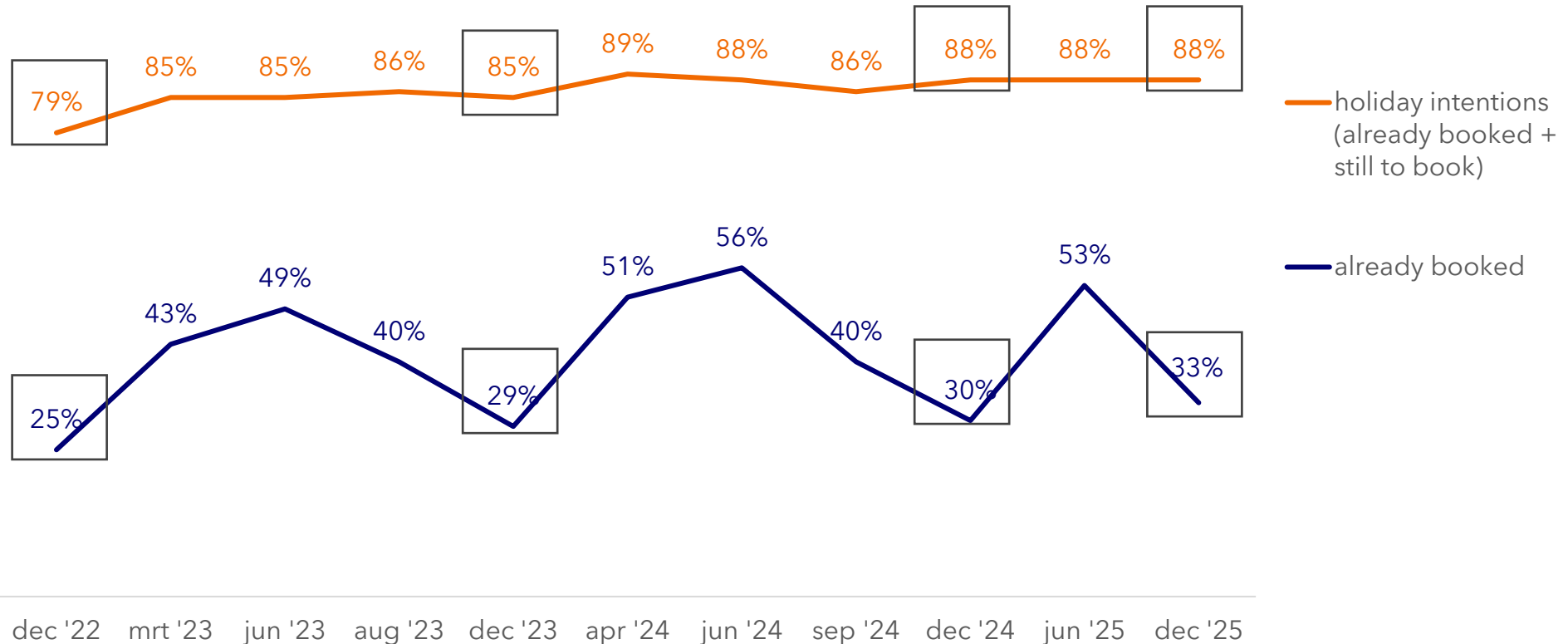
■ No, no intention

Basis: Dutch people (entire sample)

Note: the most common types of household/living situation are shown here

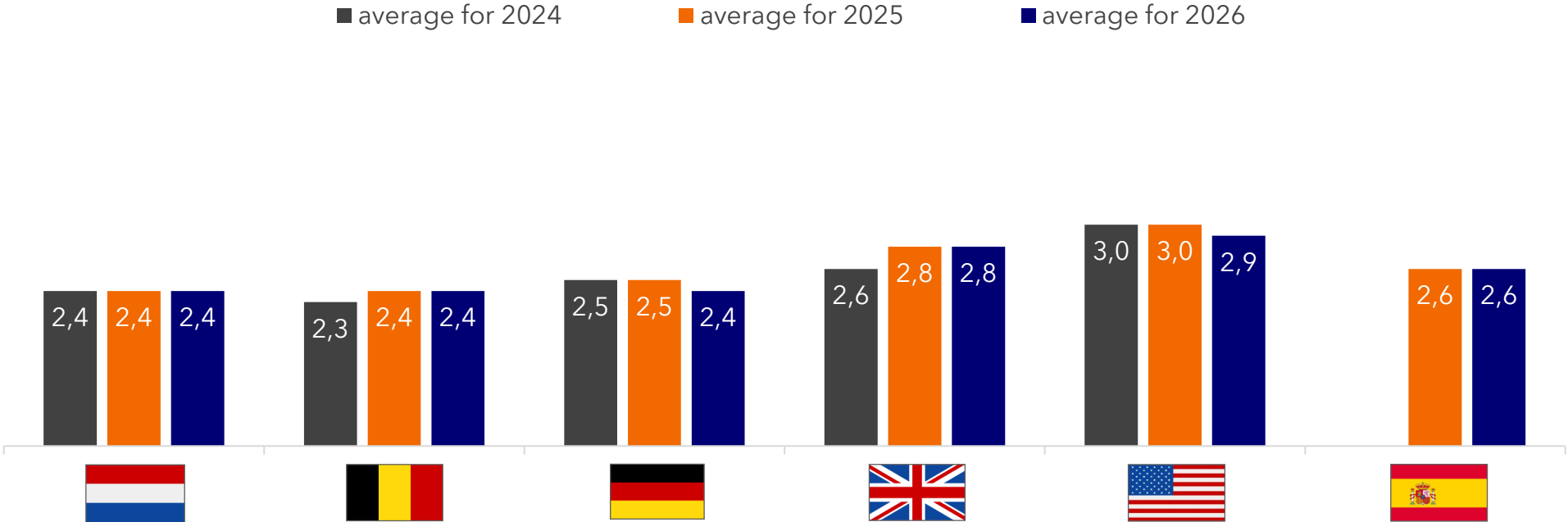
Question: Do you currently intend to go on holiday sometime in 2026?  
(in the Dec '24 survey, this concerned a holiday in 2025)

Holiday intentions for 2026 (already booked + still to book) among Dutch people stood at 88% in the first week of December (2025). This is the same as a year ago. The proportion of Dutch people who have already booked is now 33%. A year ago, this was 30%. The annual pattern is that the proportion of 'already booked' is lower in the winter months and rises in the spring/towards the summer. This always concerns holiday intentions for the coming 12 months (and in the December measurement for the coming calendar year).



## Holiday intentions over time (NL)

Respondents from the six countries below who have holiday plans for 2026 indicate that they want to take an average of 2.6 holidays. A year ago, this average was the same. The average for 2026 is highest among Americans (2.9) and lowest among Dutch, Belgians and Germans (all three 2.4).









Basis: People with holiday plans for 2026 (booked or yet to book)  
 Last year, respondents were asked about the number of holidays for 2025.

Question: How many holidays do you plan to take in 2026?  
 This can include both short and long holidays at home and abroad.



## 2. Planning and booking

In all six countries, most bookings for 2026 were made directly with the provider (average 50%). A year ago, this average was 48%. This method of booking has increased most among Germans and the Spanish. Americans book directly with the provider to a relatively high degree (63%).

						
Directly with the provider (e.g. directly with the hotel/accommodation/ transport company)	52% (50%)	47% (46%)	45% (41%)	49% (46%)	63% (64%)	42% (38%)
Through a travel agency/ - or booking website	35% (37%)	41% (39%)	37% (41%)	39% (35%)	20% (18%)	40% (43%)
A combination of the above two options	10% (11%)	8% (11%)	13% (14%)	10% (17%)	14% (14%)	16% (18%)
Other, namely	2% (3%)	3% (3%)	3% (2%)	2% (1%)	2% (2%)	1% (2%)
I don't know	1% (0%)	1% (1%)	1% (1%)	1% (0%)	1% (1%)	1% (0%)







'Other, namely' includes, among other things, own holiday home or (holiday) home of friends/family.

Basis: People who have already booked a holiday for 2026.  
 Marking: the highest percentage per country.  
 In brackets, the score from the survey a year ago (which was about 2025).

Question: How did you book your next holiday (in 2026)?



Of the people who have already booked a holiday for 2026, only Dutch people have chosen the option 'accommodation only' most often. In most other countries, package holidays are the most popular choice. It is interesting that Americans are more likely to book accommodation and transport separately.


						
A package holiday (accommodation + transport booked together)	30%	35%	39%	47%	29%	47%
Accommodation and transport booked separately (not a package holiday)	29%	30%	33%	40%	49%	33%
Only accommodation booked	35%	29%	23%	10%	15%	15%
Transport only booked	5%	4%	2%	2%	6%	4%
Other, namely	1%	2%	3%	2%	1%	0%

Basis: People who have already booked a holiday for 2026.  
Marking: the highest percentage per country.

Question: Which situation applies to your next holiday in 2026?



Both Dutch couples and Dutch families have chosen 'only accommodation booked' as the most popular category for their next holiday in 2026. This percentage is slightly higher among families than among couples (41% vs. 35% respectively). The holiday can be in their own country or abroad.







	With partner	With family
A package holiday (accommodation + transport booked together)	28%	26%
Accommodation and transport booked separately (not a package holiday)	33%	29%
Only accommodation booked	35%	41%
Transport only booked	2%	4%
Other, namely	2%	0%

Basis: Dutch people who have already booked a holiday for 2026.  
 Marking: the highest percentage per country.

Question: Which situation applies to your next holiday in 2026?



Of those who have already booked a holiday, the next holiday is mostly in January (average 15%). This is followed by March, April and May (all three average 13%). For Dutch people, July is also a popular month for holidays, as it is for Belgians. Germans and Spaniards have already booked relatively many holidays for May. The Spanish and the Brits have (also) booked many holidays for March. Americans are focusing on January.


						
January	15% (16%)	14% (14%)	9% (11%)	14% (13%)	24% (23%)	12% (14%)
February	13% (11%)	10% (12%)	9% (9%)	12% (14%)	13% (18%)	9% (14%)
March	10% (11%)	10% (9%)	11% (11%)	15% (14%)	15% (14%)	13% (11%)
April	13% (8%)	14% (14%)	12% (11%)	12% (17%)	14% (12%)	12% (12%)
May	13% (15%)	13% (10%)	17% (16%)	14% (13%)	10% (6%)	13% (10%)
June	7% (12%)	10% (12%)	13% (14%)	11% (11%)	7% (9%)	12% (9%)
July	15% (13%)	15% (15%)	13% (14%)	10% (6%)	9% (5%)	9% (13%)
August	8% (8%)	8% (7%)	8% (7%)	6% (6%)	4% (5%)	10% (9%)
September	3% (2%)	3% (3%)	4% (6%)	2% (4%)	1% (2%)	4% (3%)
October	1% (2%)	2% (2%)	3% (1%)	2% (1%)	0% (1%)	0% (1%)
November	0% (1%)	0% (0%)	0% (0%)	1% (0%)	1% (1%)	0% (1%)
December	1% (1%)	1% (1%)	0% (1%)	1% (0%)	2% (3%)	4% (2%)
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Basis: People who have already booked a holiday.  
 Marking: the highest percentage per country.  
 The scores from a year ago are shown in brackets.

Question: In which month will you be going on your next holiday (in 2026)?  
 (in the Dec '24 survey, it was a holiday in 2025)



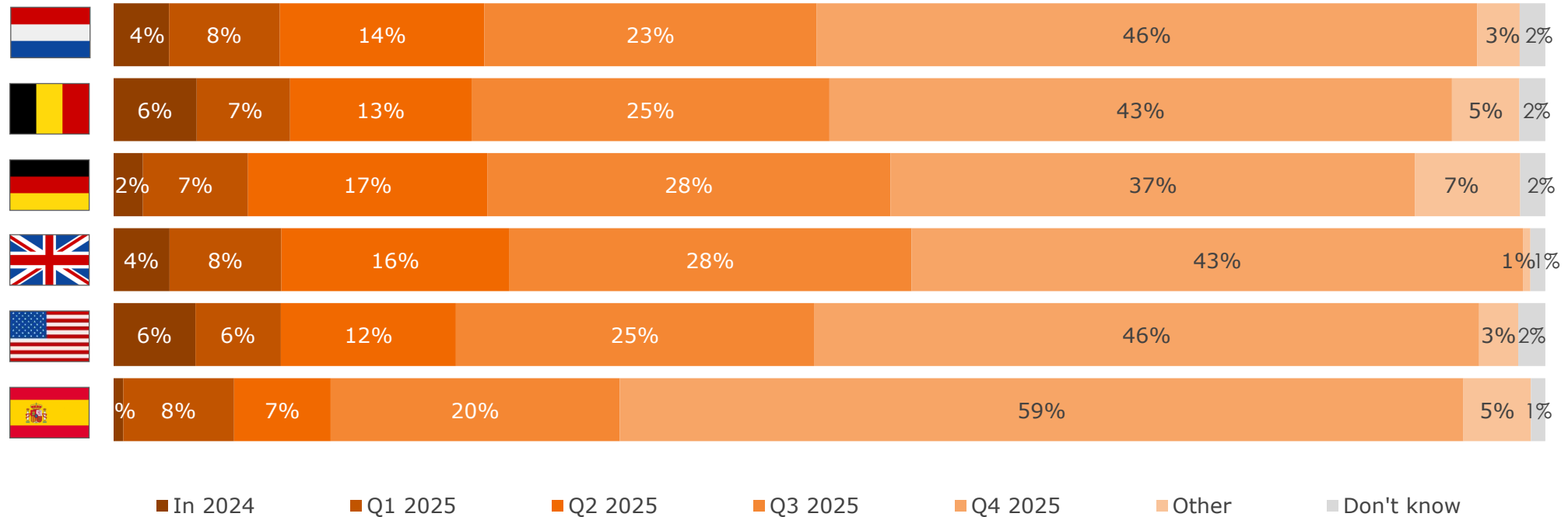
Dutch people who have already booked a holiday with their partner usually depart in January and February (both 16%), followed by April and May (both 14%). For Dutch people going on holiday with their family, July is currently the most popular departure month (23%), followed by April (16%).

	With partner	With family
January	16% (20%)	11% (8%)
February	16% (13%)	12% (12%)
March	12% (8%)	7% (15%)
April	14% (7%)	16% (11%)
May	14% (12%)	12% (16%)
June	8% (17%)	5% (9%)
July	11% (8%)	23% (20%)
August	5% (8%)	12% (9%)
September	5% (2%)	2% (0%)
October	0% (2%)	0% (1%)
November	0% (2%)	0% (0%)
December	1% (0%)	0% (0%)
<b>Total</b>	<b>100%</b>	<b>100%</b>

Basis: Dutch people who have already booked a holiday  
 Marking: the highest percentage per category. The scores from a year ago are shown in brackets.  
 Note: the most common types of travel groups are shown here

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

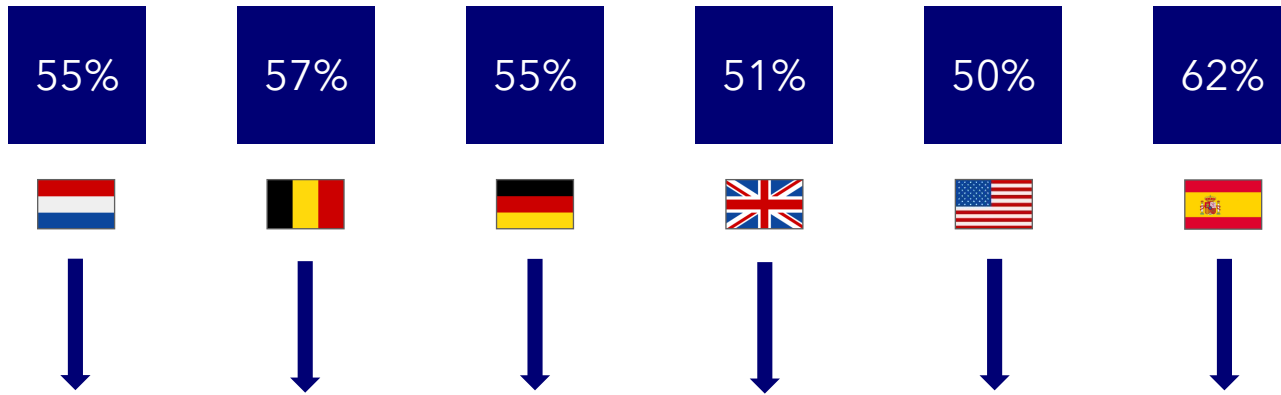
Of the people who have already booked a holiday for 2026, the largest group did so in October/November/December, i.e. Q4 2025 (average 45%). An average of 25% also booked in Q3 2025 (July/August/September). Among the Spanish, it is striking that a relatively high proportion booked in Q4 (59%).



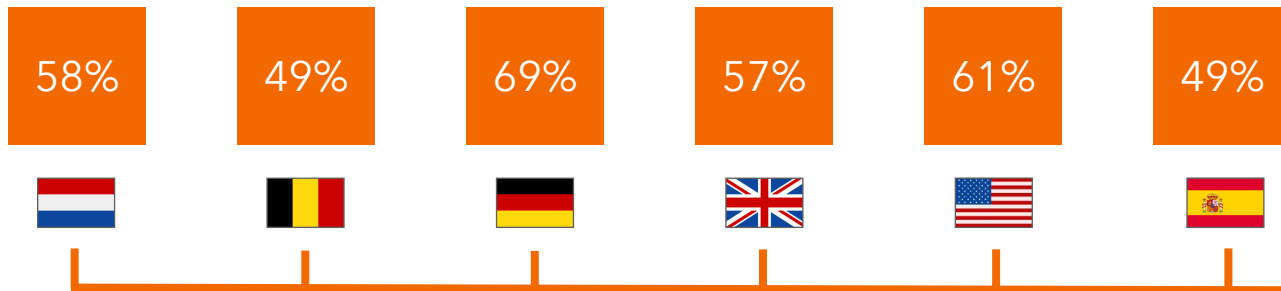
Basis: People who have already booked a holiday for 2026. Question: When did you book your next holiday?

On average, 55% have holiday intentions for 2026 but have yet to book. Of this group that has yet to book, an average of 57% are exploring holiday options. Currently, the most popular months are May and July (both 15% on average), followed by April (14% on average) and June (13% on average).

**Holiday intention but still need to book**

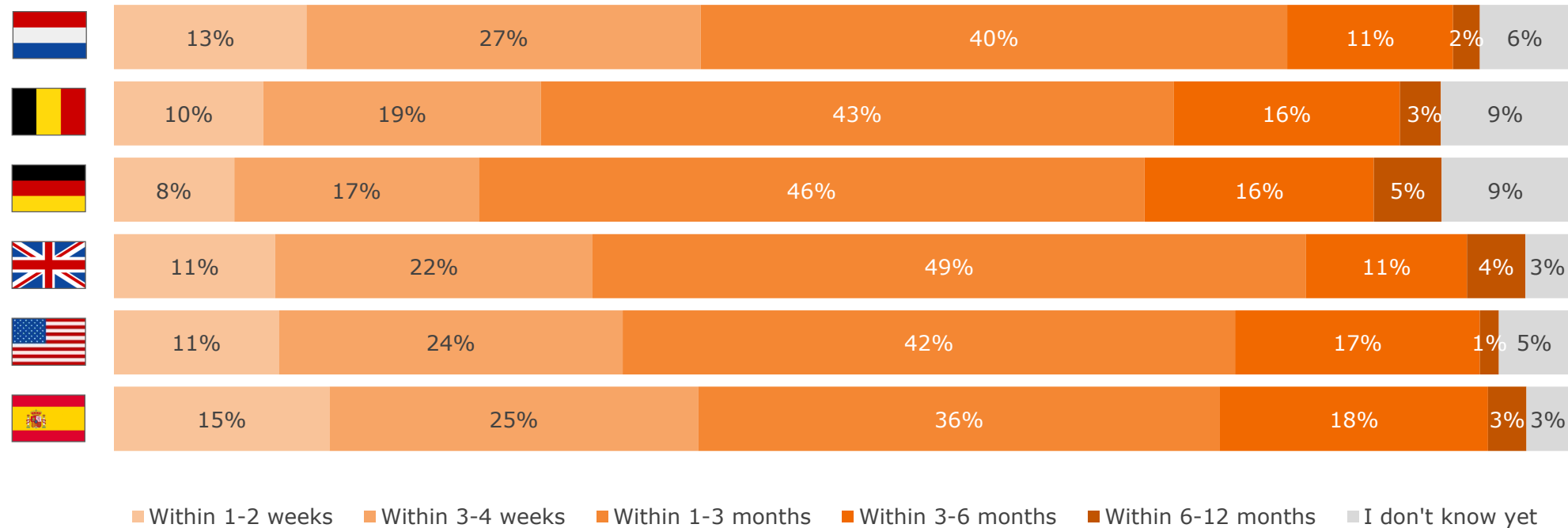


**Looking into holidays**



<b>Month of departure:</b>						
January	7%	7%	5%	8%	6%	7%
February	9%	6%	4%	12%	11%	5%
March	6%	7%	8%	12%	16%	13%
April	16%	14%	9%	11%	<b>18%</b>	<b>16%</b>
May	<b>18%</b>	13%	<b>18%</b>	<b>15%</b>	14%	9%
June	12%	14%	16%	10%	15%	11%
July	14%	<b>22%</b>	15%	13%	11%	15%
August	9%	10%	12%	8%	4%	<b>16%</b>
September	6%	5%	6%	4%	3%	5%
October	1%	2%	3%	1%	1%	2%
November	1%	0%	1%	1%	0%	0%
December	2%	1%	2%	3%	2%	2%
<b>Number</b>	<b>N=325</b>	<b>N=283</b>	<b>N=387</b>	<b>N=298</b>	<b>N=309</b>	<b>N=304</b>







Of the people who are researching holidays in 2026, the largest group plans to book this holiday within 1 to 3 months (43% on average). In addition, an average of 22% indicate that they want to book within 3 to 4 weeks, 15% within 3 to 6 months and 11% within 1 to 2 weeks.



Basis: People who still need to book their holiday but are already looking into options

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

On average, 57% of people who have not yet booked but intend to go on holiday in 2026 are already exploring options for their upcoming holiday. If people intend to go on holiday but are not yet researching options, this is mainly because they have not yet had time to do so (average 29%) or because their financial situation does not allow it (average 9%). Among Dutch people, the percentage who are already exploring options is now higher than a year ago.







						
Yes (already exploring options)	58% (53%) ↑	49% (49%)	69% (67%)	57% (56%)	61% (64%)	49% (48%)
No, I haven't had time to look into it yet	32% (35%)	34% (37%)	15% (17%)	28% (30%)	23% (22%)	39% (40%)
No, my financial situation does not allow it (e.g. due to inflation and rising prices)	6% (6%)	11% (7%) ↑	9% (7%)	10% (8%)	11% (11%)	7% (6%)
No, due to uncertainties surrounding current wars	2% (4%) ↓	5% (5%)	6% (7%)	2% (3%)	2% (1%)	4% (4%)
No, for another reason	2% (2%)	2% (1%)	1% (2%)	2% (3%)	3% (2%)	1% (2%)

Basis: People who have not yet booked (but do intend to go on holiday in 2026)  
 The scores from a year ago are shown in brackets (the December 2024 survey concerned holidays in 2025).  
 Arrow: significant difference compared to a year ago.

Question: Are you already looking into your upcoming holiday?



People who intend to take a holiday in 2026 expect to spend their longest holiday of the year in July (average 19%) and August (average 17%). For Americans, this is the month of June. In addition, more Germans expect to spend their longest holiday in May this year (compared to last year), and for British people this applies to the month of July.

						
January	3% (3%)	2% (2%)	2% (2%)	3% (3%)	5% (6%)	2% (2%)
February	3% (4%)	2% (3%)	3% (3%)	4% (4%)	5% (7%) ↓	2% (3%)
March	2% (4%) ↓	3% (4%)	5% (4%)	6% (7%)	8% (7%)	4% (5%)
April	5% (5%)	6% (6%)	6% (7%)	7% (9%)	10% (12%)	6% (5%)
May	14% (12%)	10% (11%)	15% (12%) ↑	11% (12%)	11% (11%)	8% (10%)
June	13% (14%)	13% (13%)	13% (14%)	14% (14%)	18% (16%)	13% (11%)
July	19% (17%)	26% (25%)	16% (17%)	16% (13%) ↑	15% (13%)	21% (21%)
August	20% (19%)	17% (15%)	17% (18%)	17% (15%)	8% (11%) ↓	24% (23%)
September	13% (13%)	11% (12%)	11% (14%) ↓	10% (11%)	6% (4%) ↑	12% (10%)
October	4% (4%)	3% (3%)	4% (4%)	3% (4%)	4% (3%)	2% (3%)
November	1% (1%)	1% (1%)	2% (2%)	1% (2%)	2% (2%)	1% (1%)
December	1% (1%)	1% (1%)	1% (1%)	2% (3%)	3% (3%)	2% (2%)
I don't know yet	3% (3%)	5% (4%)	4% (4%)	5% (4%)	5% (6%)	4% (3%)
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Basis: People with holiday plans for 2026 (booked or yet to book)  
 Marking: the highest percentage per country. Arrow: significant difference compared to a year ago.  
 In brackets: scores from a year ago (when it concerned the longest holiday in 2025)

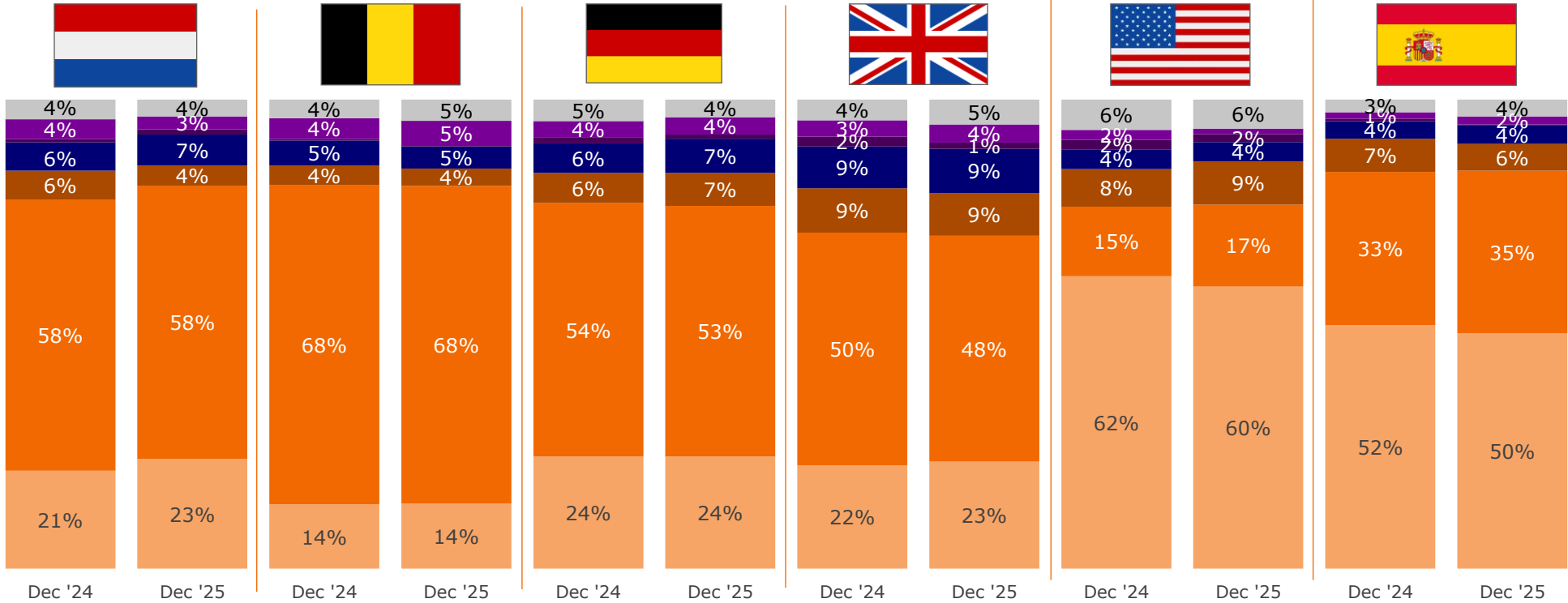
Question: In which month do you expect to take your longest holiday of the year (in 2026)?  
 If the holiday falls in more than one month, select the month of departure.

# Departure month for longest holiday in 2026



# 3. Destination and length of stay

The graph below shows a similar picture to a year ago. There are no significant differences in the choice between one's own country or another continent. 23% of Dutch people choose their own country for their next holiday in 2026. This is similar to the British and Germans. Americans and the Spanish are much more likely to choose their own country. This is lowest among Belgians (14%).

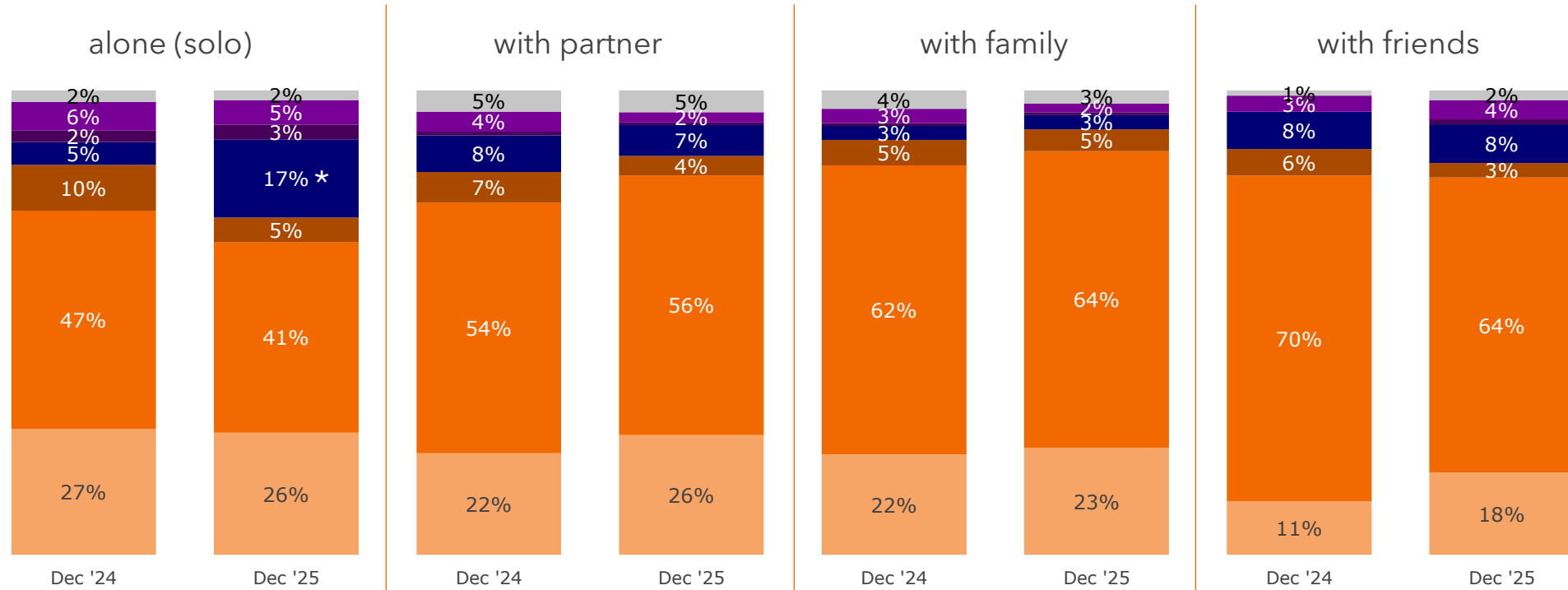


■ Own country  
 ■ Europe  
 ■ North/South America  
 ■ Asia  
 ■ Australia/Oceania  
 ■ Africa  
 ■ Not sure yet

Basis: People with holiday plans in 2026 (booked or yet to be booked).  
 (A year ago, the question was about plans for 2025).  
 \*: significant difference compared to the measurement taken one year ago

Question: Where do you plan to spend most of your next holiday (in 2026)?

Dutch people who go on holiday/travel alone (solo) are more likely to spend their next holiday in Asia than they were a year ago. This is mainly at the expense of holidays in Europe and North/South America. Dutch couples and groups of friends, on the other hand, seem to be choosing their own country more often for their next holiday (or weekend break).

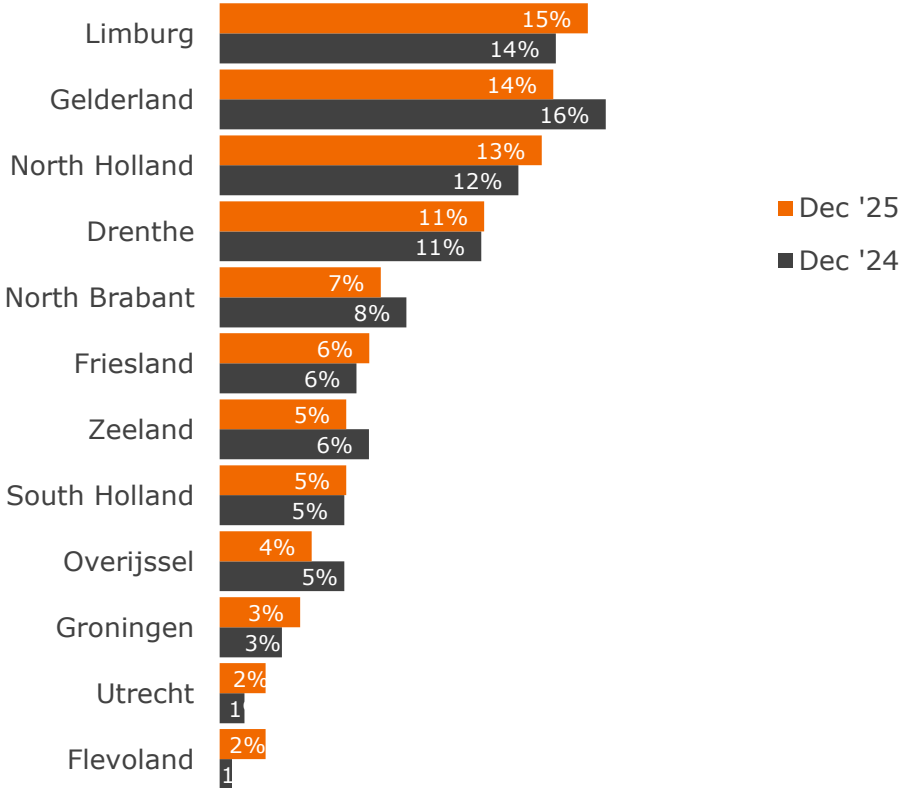


Own country Europe North/South America Asia Australia/Oceania Africa Not sure yet

Basis: Dutch people with holiday plans in 2026 (booked or yet to book)  
 Note: the most common types of travel groups are shown here  
 \*: significant difference compared to the survey conducted one year ago

Question: Where do you plan to spend most of your next holiday (in 2026)?  
 (in the Dec '24 survey, this concerned a holiday in 2025)

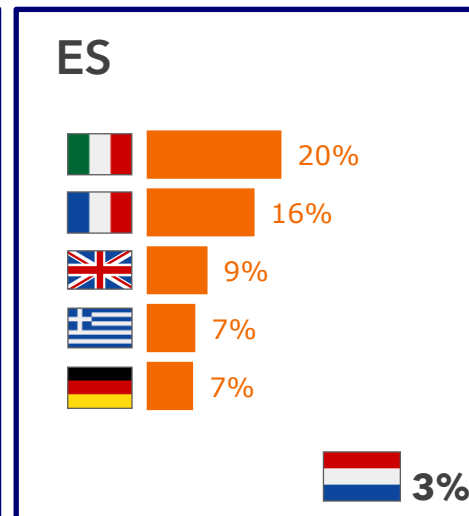
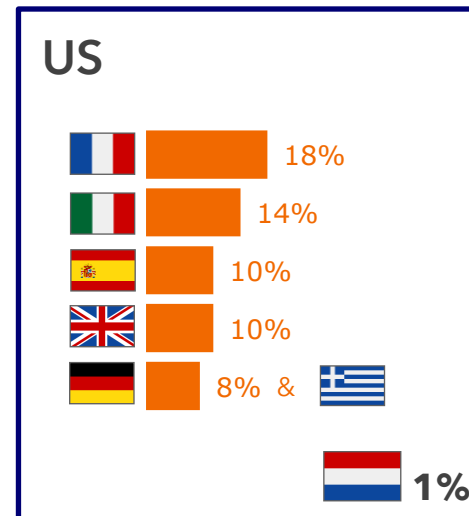
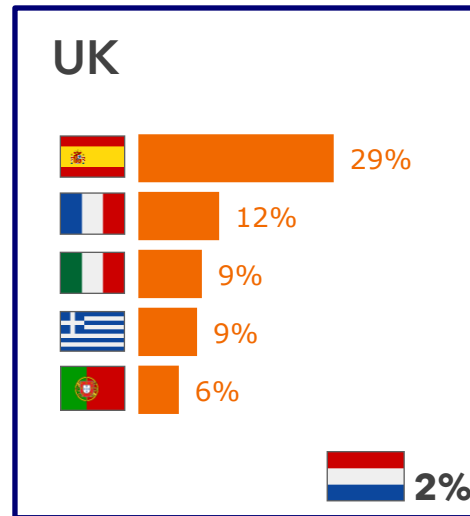
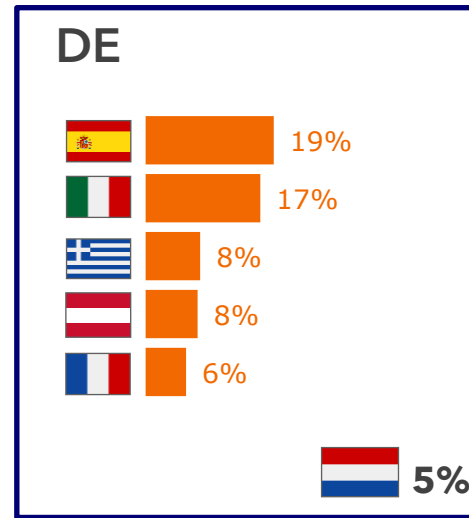
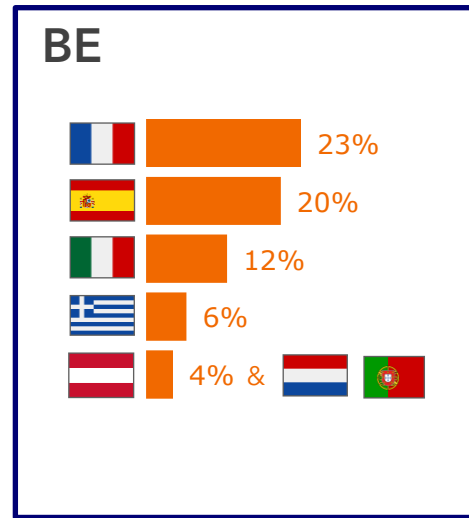
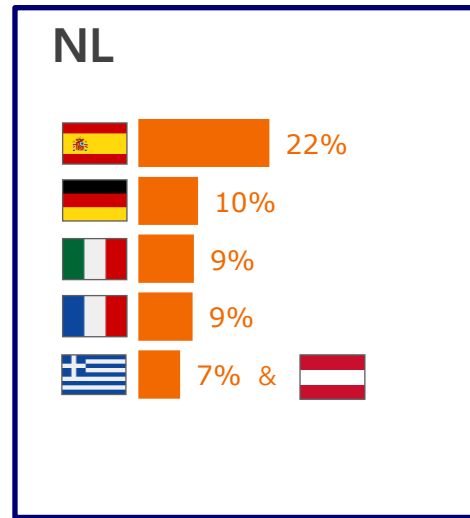
Dutch people who want to spend their next holiday in 2026 in the Netherlands indicate that they most want to do so in Limburg (15%). This is followed by Gelderland (14%), North Holland (13%) and Drenthe (11%). This can be either a short holiday (e.g. a weekend away) or a long holiday.



Basis: 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 most of your next holiday in 2026 (in the Netherlands)?  
 (in the Dec '24 survey, this concerned a holiday in 2025)



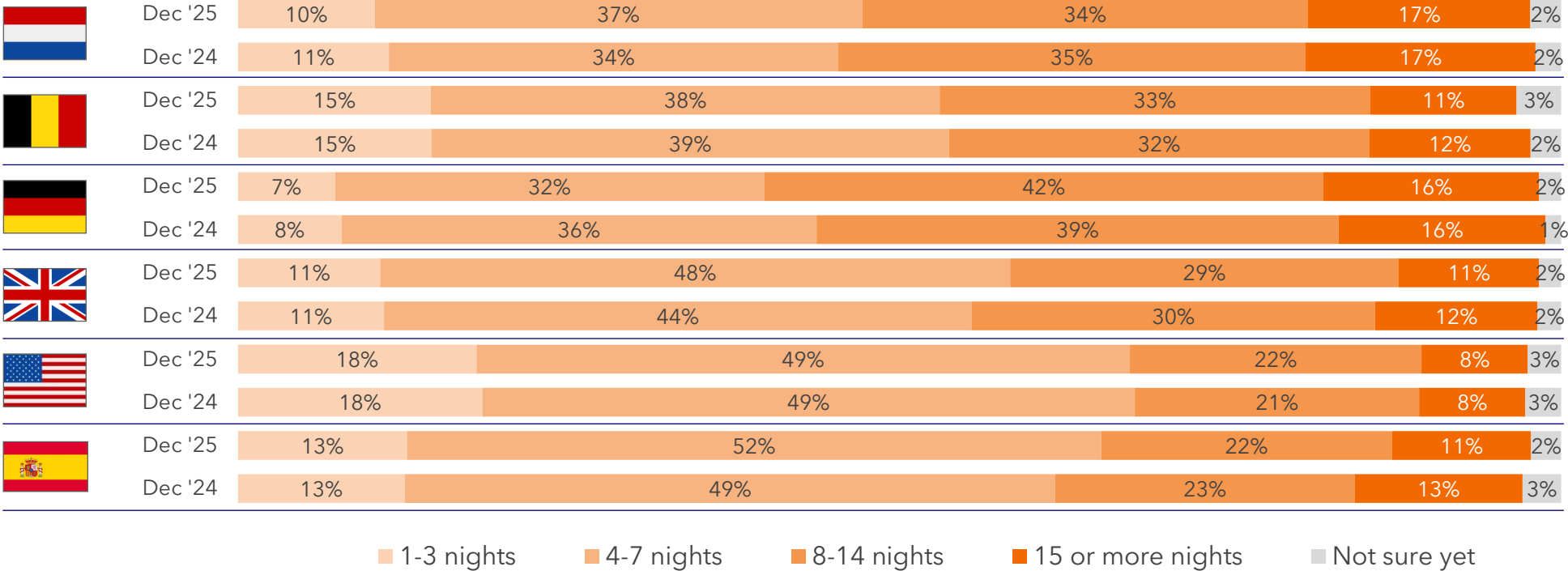


- Spain is the most popular European holiday destination. Among Dutch, German and British holidaymakers, Spain tops the top 5.
- Among Belgians, France is the favourite holiday destination, followed by Spain. The Netherlands shares fifth place with Austria and Portugal. A year ago, the Netherlands was in the top 5 with 7%.
- Among Germans, the Netherlands ranks sixth, just outside the top 5. A year ago, this was the same (also 5%).
- In addition to Spain, Italy, France and Greece are also popular holiday destinations in Europe.
- Note:** This top 5 of European destinations does not include the respondents' own country as a holiday destination.

Basis: People with holiday plans in Europe (booked or still to book)

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

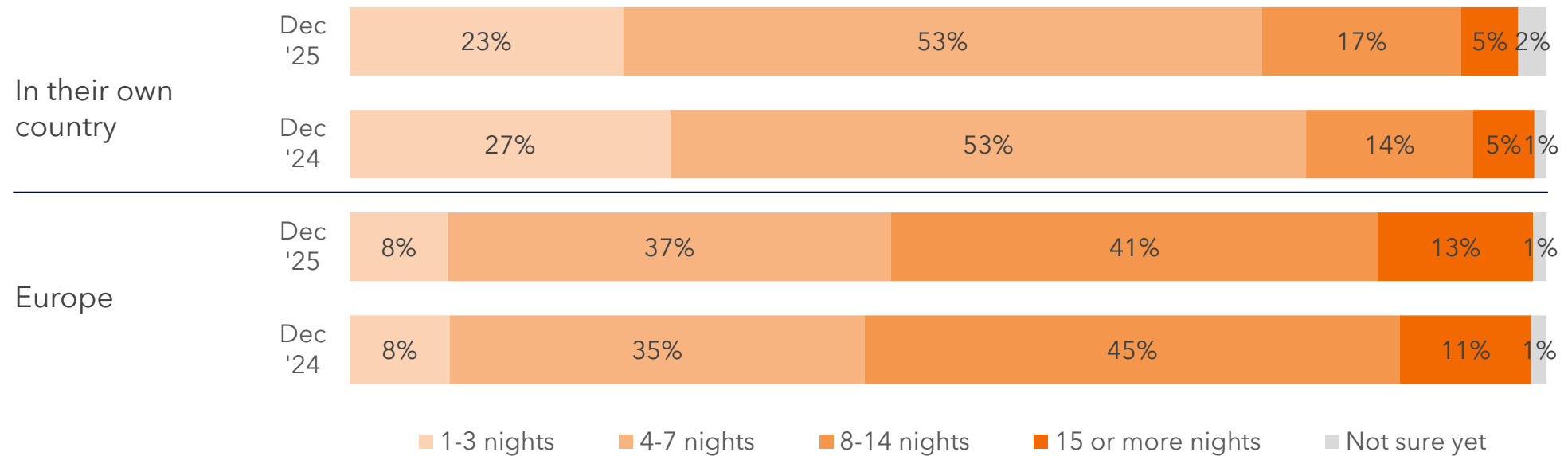
On average, the majority of respondents will be going away for 4-7 nights for their next holiday (avg. 43%). The next most popular category is 8-14 nights (avg. 30%). A year ago, the pattern was similar. Among Americans, the proportion of short holidays is highest compared to other countries; 18% are going away for 1-3 nights. Among Dutch people, the proportion going away for 15+ nights is relatively high, at 17%.



Basis: People with holiday plans for 2026 (booked or yet to book) (in last year's survey, the question referred to 2025)

Question: How long do you plan to be away during your next holiday (in 2026)?

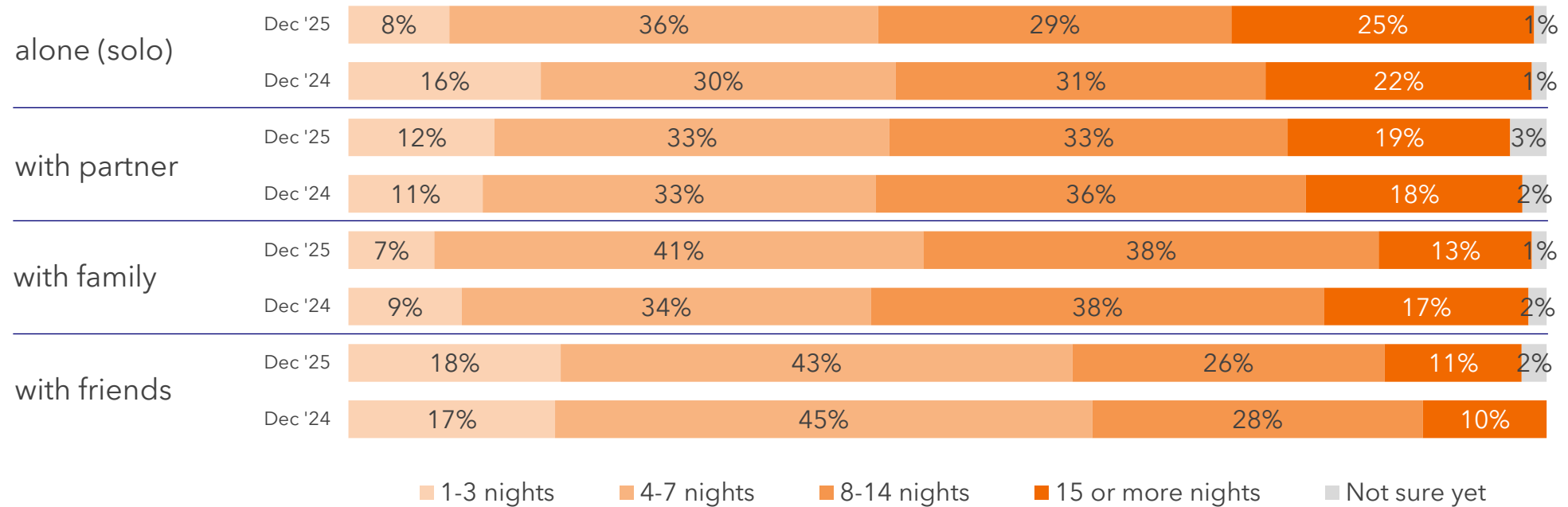
Of the Dutch people who will be spending their next holiday in their own country, approximately a quarter will be going on a short holiday (1-3 nights). Approximately half will choose 4-7 nights. If the holiday destination is elsewhere in Europe, 8-14 nights is the most popular length of stay among Dutch people (41%), followed by 4-7 nights (37%).



Basis: Dutch people with holiday plans for 2026 (booked or yet to book)  
 Note: the most common types of travel groups are shown here

Question: How long do you plan to be away during your next holiday (in 2026)?







Compared to a year ago, Dutch solo travellers are taking fewer short holidays of 1-3 nights. They are now more likely to choose 4-7 nights or 15+ nights. Families are also more likely to choose 4-7 nights for their next holiday than a year ago.



Basis: People with holiday plans for 2026 (booked or yet to book)  
 Note: the most common types of travel group are shown here

Question: How long do you plan to be away during your next holiday (in 2026)?

On average, 73% of Dutch, Belgian, German and British people expect to spend their longest holiday of 2026 abroad. A year ago, this average was 75%. The majority of Americans and Spanish people plan to spend their longest holiday of the year in their own country (59% and 53% respectively). The biggest difference compared to a year ago is among Americans: they are less likely to spend their longest holiday in their own country.

						
In own country	19% (19%)	15% (15%)	27% (24%)	25% (23%)	59% (63%) ↓	53% (53%)
Abroad	75% (76%)	78% (81%)	67% (70%)	71% (74%)	35% (30%) ↑	42% (43%)
Other, namely...	1% (0%)	1% (1%)	1% (1%)	1% (1%)	2% (2%)	0% (1%)
I don't know (yet)	5% (5%)	7% (4%)	5% (5%)	3% (3%)	4% (5%)	6% (4%)

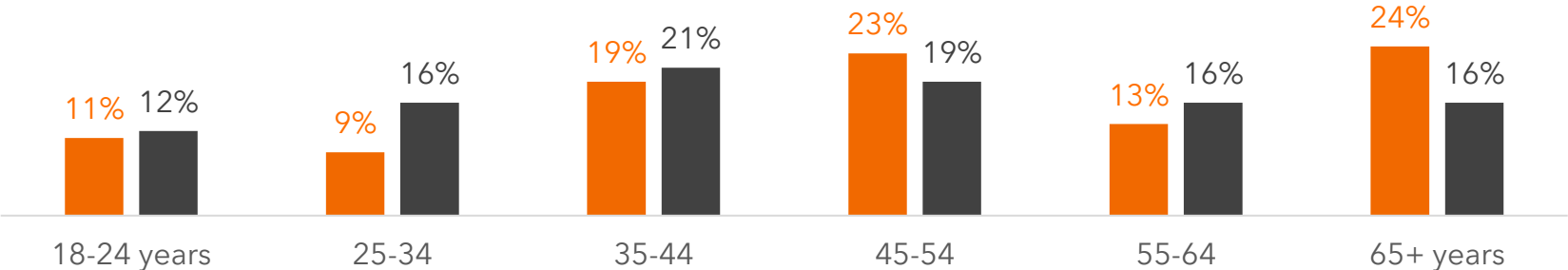
Basis: People with holiday plans for 2026 (booked or yet to book)  
 Marking: highest score per country.  
 Scores from a year ago are shown in brackets. Arrow: significant difference.

Question: Where do you expect to spend your longest holiday in 2026?

Dutch people who plan to spend their longest holiday of 2026 in their own country are generally somewhat older. About a quarter are aged 65+. Dutch people who plan to spend their longest holiday abroad are mostly aged 35-44 (21%). The 25-34 age group also stands out, with a relatively large difference between holidaying in their own country and abroad.



- Orange square: Dutch people who plan to spend their longest holiday of 2026 in their own country.
- Dark grey square: Dutch people who plan to spend their longest holiday of 2026 abroad.



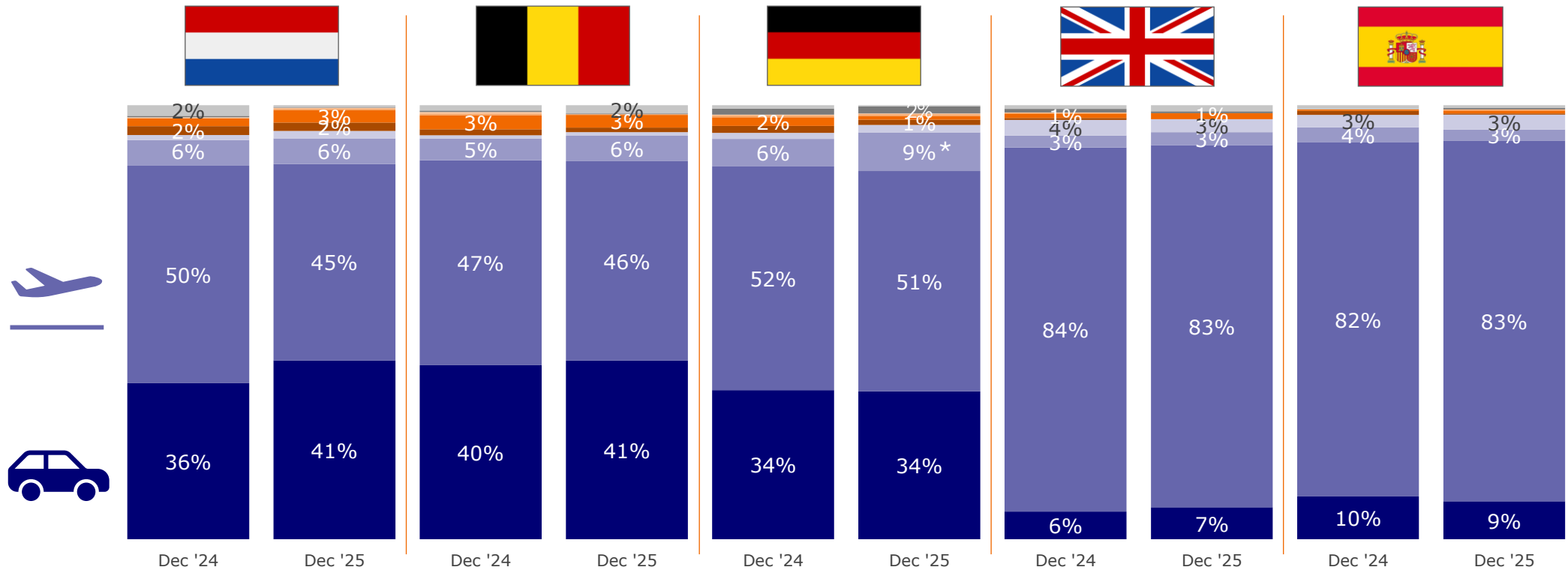
Basis: Dutch people with holiday plans for 2026 (booked or yet to book)      Question: Where do you expect to spend your longest holiday in 2026?



# 4. Holiday characteristics

- Means of transport (in Europe)
- Travel group
- Type of accommodation
- Type of holiday
- Factors influencing holiday destination

For these five countries, the aeroplane is the most popular means of transport for the next holiday in Europe (average 59%). Overall, the choice of transport is similar to a year ago. However, more Germans are now travelling by train and more Dutch people seem to be opting for the car. Note: this excludes domestic holidays.

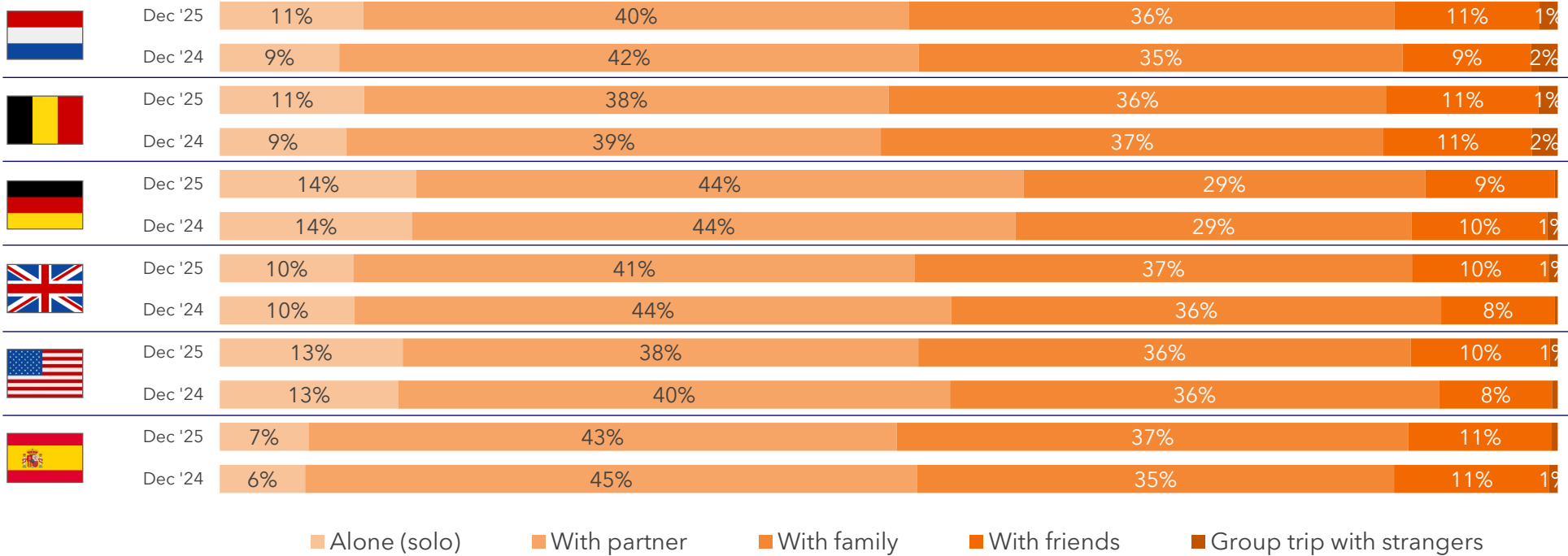


■ Car 
 ■ Plane 
 ■ Train 
 ■ Boat 
 ■ Campervan 
 ■ Coach 
 ■ Bicycle/Moped/Scooter 
 ■ Motorbike 
 ■ Other 
 ■ Don't know yet

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

Question: Which means of transport are you considering using to travel to your next holiday destination in Europe? (excluding domestic holidays)







As shown below, the majority go on holiday with their partner (average 41%), followed by a holiday with family (average 35%). Furthermore, an average of 11% have plans for a solo trip and 10% for a holiday/trip with one or more friends. The number of solo travellers is highest among Germans and lowest among Spaniards.



Basis: People with holiday plans for 2026 (booked or yet to book)

Question: With which travel group do you plan to take your next holiday (in 2026)?  
 (in the December 2024 survey, this concerned holidays in 2025)

A hotel/guesthouse is the most popular type of accommodation (average 50%). This is followed by an apartment (average 13%) and private accommodation (average 8%). Bungalows (parks) are particularly popular among Dutch people. British and American people are relatively more likely to choose private accommodation (e.g. Airbnb).

						
Hotel/guesthouse	39% (41%)	47% (46%)	50% (51%)	52% (52%)	57% (60%)	56% (55%)
Bed and breakfast	4% (4%)	8% (5%) ↑	3% (3%)	5% (4%)	4% (4%)	3% (3%)
Apartment	18% (15%) ↑	10% (13%) ↓	22% (22%)	10% (10%)	2% (2%)	16% (16%)
Bungalow (park)	15% (14%)	6% (6%)	2% (2%)	1% (2%)	1% (1%)	1% (1%)
Campsite	8% (7%)	5% (4%)	4% (4%)	2% (2%)	4% (4%)	2% (2%)
Group accommodation	2% (1%)	1% (2%)	0% (0%)	1% (1%)	1% (0%)	2% (1%)
With a private individual (e.g. Airbnb)	5% (6%)	7% (9%)	5% (6%)	12% (12%)	12% (11%)	7% (7%)
Boat	1% (1%)	1% (1%)	2% (2%)	3% (3%)	5% (4%)	1% (1%)
Second home / permanent residence	1% (1%)	2% (3%)	1% (1%)	1% (1%)	1% (1%)	2% (2%)
Home of family/friends/acquaintances	3% (5%)	7% (5%)	6% (5%)	5% (6%)	8% (9%)	7% (8%)
Other	1% (2%)	1% (1%)	1% (2%)	3% (3%)	2% (1%)	1% (1%)

Basis: People with holiday plans for 2026 (booked or yet to book).  
 Marking: 3 highest scores per country. Arrow: significant difference compared to the measurement a year ago.  
 The scores from a year ago are shown in brackets.

Question: What type of accommodation do you plan to stay in during your next holiday in 2026?  
 (in the Dec '24 measurement, this concerned a holiday in 2025)

For their next holiday in their own country, Dutch people most often choose a bungalow, even though this option is now less popular than a year ago. For holidays elsewhere in Europe, bungalows are chosen more often than a year ago, as are apartments. Despite a decline in the choice of hotels/guesthouses (elsewhere in Europe), these remain the most popular form of accommodation there.









	In our own country	Elsewhere in Europe
Hotel/guest house	29% (22%)	40% (46%) ↓
Bed and breakfast	4% (7%)	5% (4%)
Apartment	7% (6%)	23% (20%) ↑
Bungalow (park)	35% (44%) ↓	10% (7%) ↑
Campsite	14% (10%)	7% (8%)
Group accommodation	2% (1%)	2% (1%)
With a private individual (e.g. Airbnb)	4% (3%)	5% (6%)
Boat	0% (2%)	1% (0%)
Second home / permanent residence	1% (1%)	1% (1%)
Home of family/friends/acquaintances	1% (3%)	3% (4%)
Other	1% (1%)	2% (1%)

Basis: People with holiday plans for 2026 (booked or yet to book).  
 Marking: 3 highest scores per country. Arrow: significant difference compared to the measurement a year ago.  
 The scores from a year ago are shown in brackets.

Question: What type of accommodation do you plan to stay in during your next holiday in 2026?  
 (in the Dec '24 measurement, this concerned a holiday in 2025)







Beach holidays are the most popular choice (average 23%). This is followed by city breaks (average 12%), holidays with friends/family (average 11%) and nature holidays (average 10%). Cruises score relatively high among Americans.

						
Winter sports holiday	4%	3%	2%	1%	1%	1%
Beach holiday	20%	24%	32%	26%	18%	18%
Water sports holiday	1%	1%	1%	0%	1%	1%
Walking holiday (hiking)	4%	6%	6%	1%	2%	2%
Cycling holiday	3%	2%	1%	0%	0%	0%
Other type of active holiday	2%	2%	1%	2%	3%	5%
Touring holiday	6%	5%	6%	5%	3%	4%
Cruise	1%	2%	3%	5%	9%	1%
Visit to event	2%	1%	1%	3%	4%	2%
City break	10%	9%	12%	14%	9%	19%
Cultural holiday	7%	9%	5%	4%	4%	12%
Visiting friends/family/etc.	6%	6%	7%	7%	11%	7%
Nature holiday	12%	10%	13%	6%	9%	7%
Wellness holiday	3%	1%	3%	2%	4%	3%
Holiday with friends/family/etc.	12%	12%	3%	16%	15%	11%
Culinary holiday	2%	2%	2%	1%	1%	3%
Shopping holiday	1%	2%	1%	1%	2%	1%
Volunteer work	0%	0%	1%	0%	0%	0%
Other	4%	3%	2%	3%	3%	1%

Basis: People with holiday plans for 2026 (booked or yet to book)  
Marking: 5 highest scores per country

Question: How would you describe your next holiday?

On average, flexible cancellation conditions are the most important factor when choosing a holiday destination (72% on average consider this (very) important). This is followed by 'staying in a quiet place' (average 67%) and, in third place, 'destination close to home' (average 28%). Among Dutch and German travellers, the importance of flexible cancellation conditions has decreased. Dutch travellers also feel less strongly about the destination being close to home. Finally, Americans now consider a stay in a quiet location less important than a year ago.

						
Flexible cancellation policy	60% (64%) ↓	69% (70%)	74% (78%) ↓	68% (69%)	72% (75%)	88% (87%)
Destination close to home	23% (27%) ↓	29% (29%)	41% (43%)	22% (22%)	24% (25%)	27% (25%)
Stay in a quiet place	66% (69%)	75% (76%)	70% (70%)	53% (54%)	57% (64%) ↓	79% (76%)

Basis: People with holiday plans for 2026 (booked or yet to book).  
 Percentage: top 2 (very important + important). Arrow: significant difference compared to a year ago.  
 The scores from a year ago (when planning for 2025) are shown in brackets.

Question: How important are these aspects to you when choosing your holiday destination?



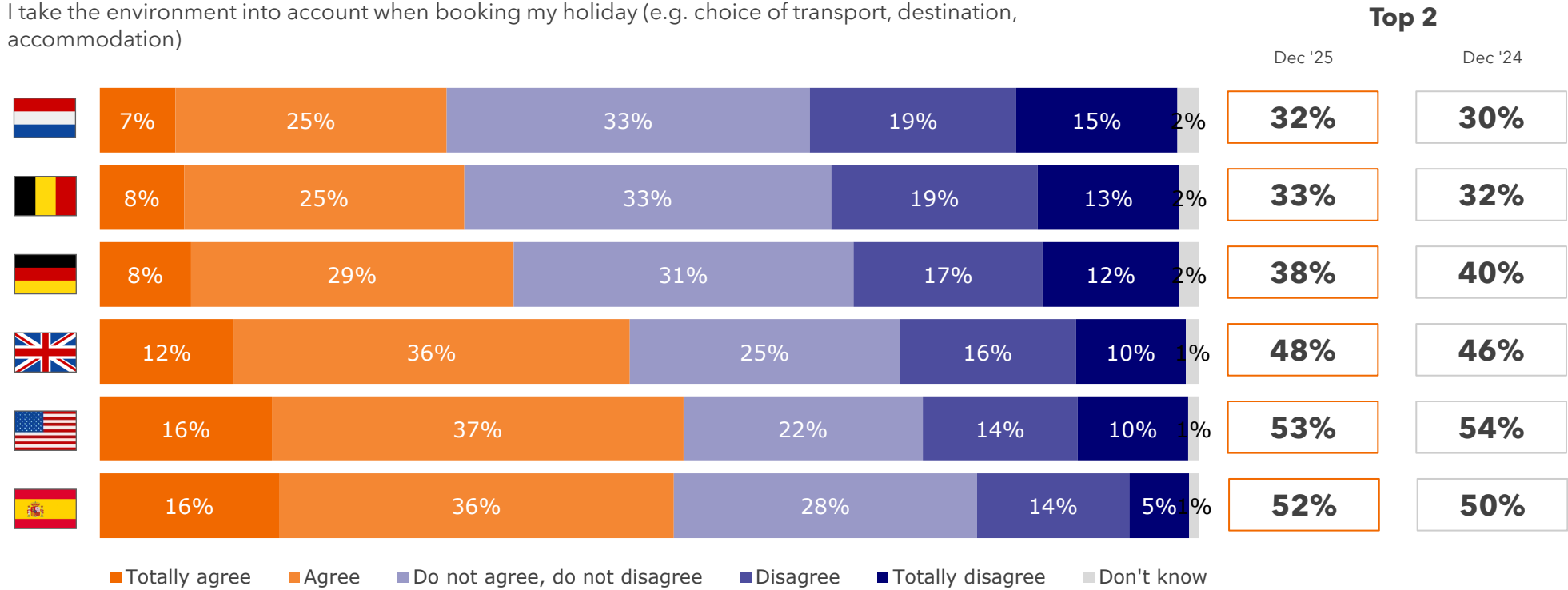


# 5. Sentiment

- Sustainability
- Extreme weather
- International conflict
- Overtourism

On average, 43% of all respondents (totally) agree with the statement 'I take the environment into account when booking my holiday'. Last year, this average was 42%. Of the countries listed below, Dutch and Belgian respondents agree with the statement to the least extent (32% and 33% respectively).

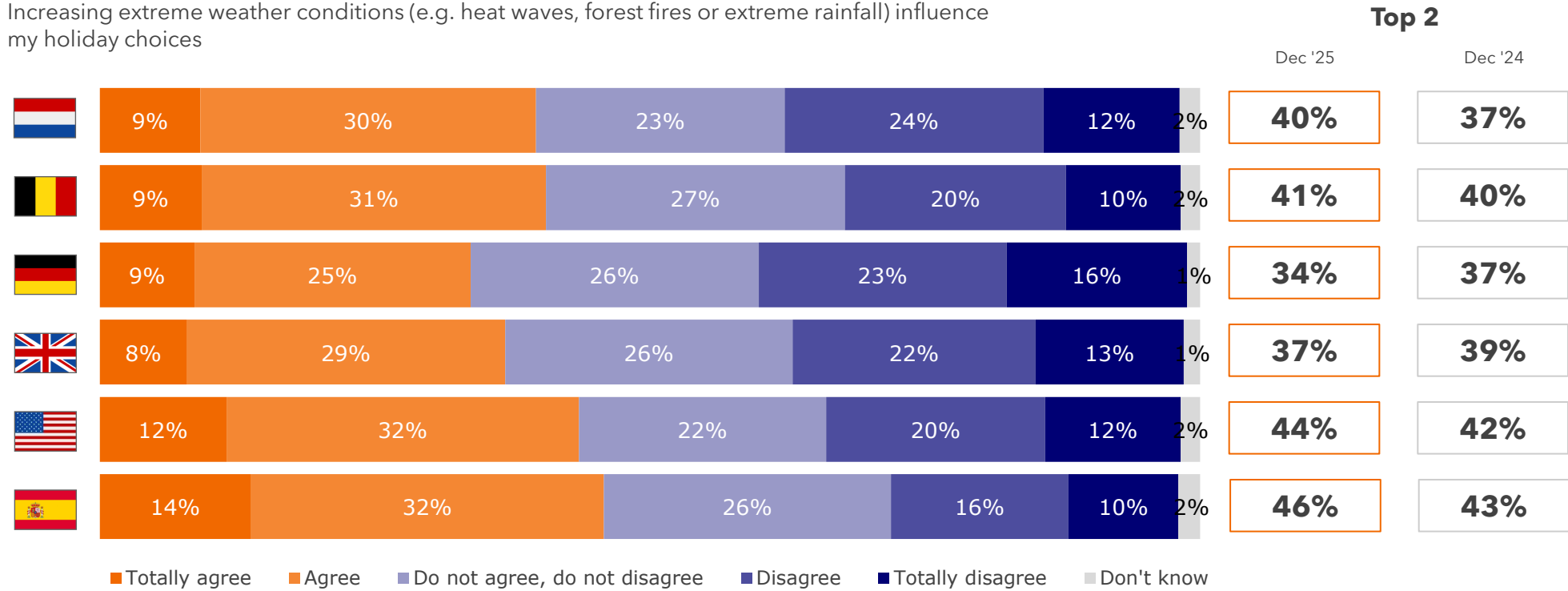
I take the environment into account when booking my holiday (e.g. choice of transport, destination, accommodation)



Basis: everyone (entire sample)  
Rounding differences may occur in the top 2%.







On average, 40% of respondents (totally) agree with the statement that increasing extreme weather conditions influences their choice of holiday destination. A year ago, this figure was also 40%. Germans are the least likely to agree with the statement (34%), while the Spanish are the most likely (46%).

Increasing extreme weather conditions (e.g. heat waves, forest fires or extreme rainfall) influence my holiday choices



Basis: everyone (entire sample)  
Rounding differences may occur in the top 2%.

As a result of increasingly extreme weather conditions, people are most likely to adjust the period in which they go on holiday (average 48%). This is followed by adjusting the destination (average 40%). Among Dutch people, these two scores are equally high. Overall, the holiday period is being adjusted more than a year ago, due to the risk of extreme weather.

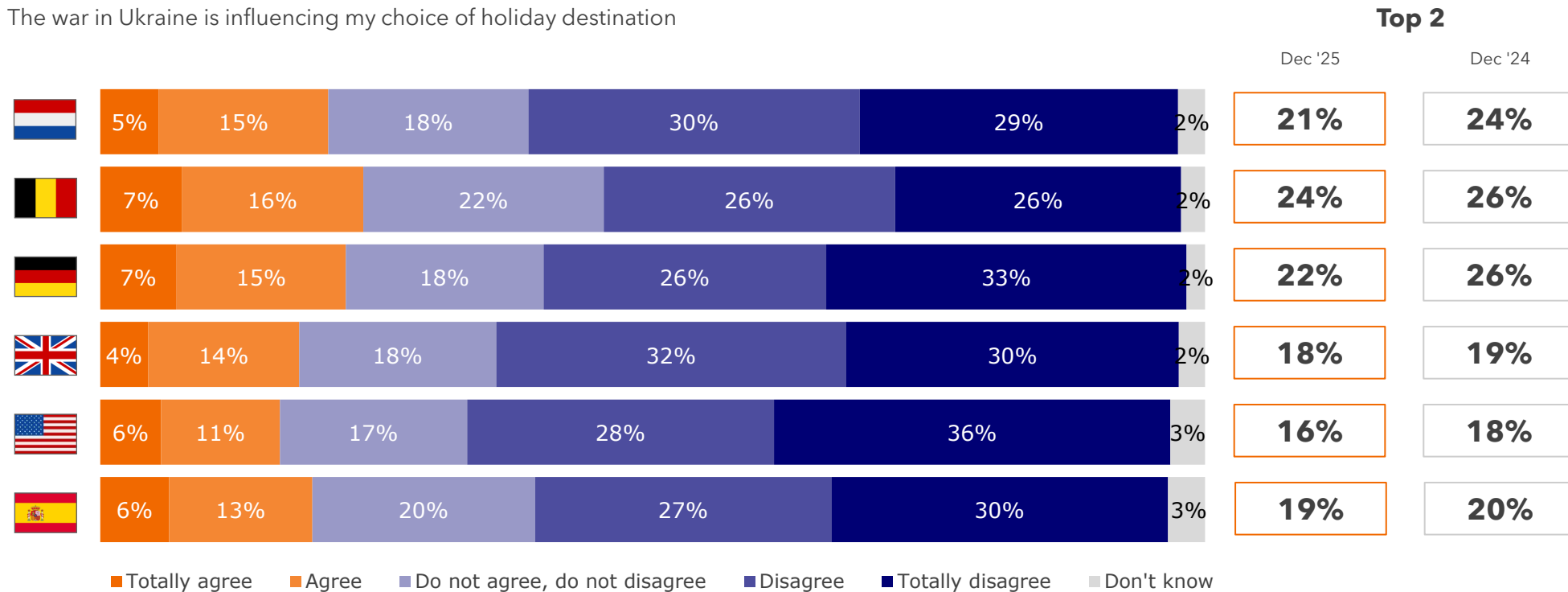
						
I adjust my destination	48% (60%) ↓	42% (40%)	55% (53%)	35% (35%)	32% (35%)	32% (33%)
I adjust my holiday period	48% (39%) ↑	56% (46%) ↑	52% (45%) ↑	44% (45%)	46% (43%)	42% (36%) ↑
I book more last-minute	22% (18%)	15% (15%)	17% (17%)	20% (19%)	19% (21%)	24% (25%)
I pay extra attention to terms and conditions and insurance policies	21% (16%) ↑	18% (18%)	23% (19%)	34% (28%) ↑	35% (37%)	35% (34%)
Other, namely	3% (3%)	0% (3%)	1% (2%)	2% (2%)	3% (1%)	1% (2%)

Basis: people who agree with the statement that increasing extreme weather conditions influence their holiday choices.  
 Marking: highest score per country.  
 Scores in brackets are from a year ago.

Question: How do increasing extreme weather conditions influence your holiday choices?  
 Multiple answers possible.

Exactly one-fifth of respondents (20%) indicate that the war in Ukraine influences their choice of holiday destination. A year ago, this figure was 22% on average. Among Americans, this score is currently the lowest (16%) and among Belgians the highest (24%).

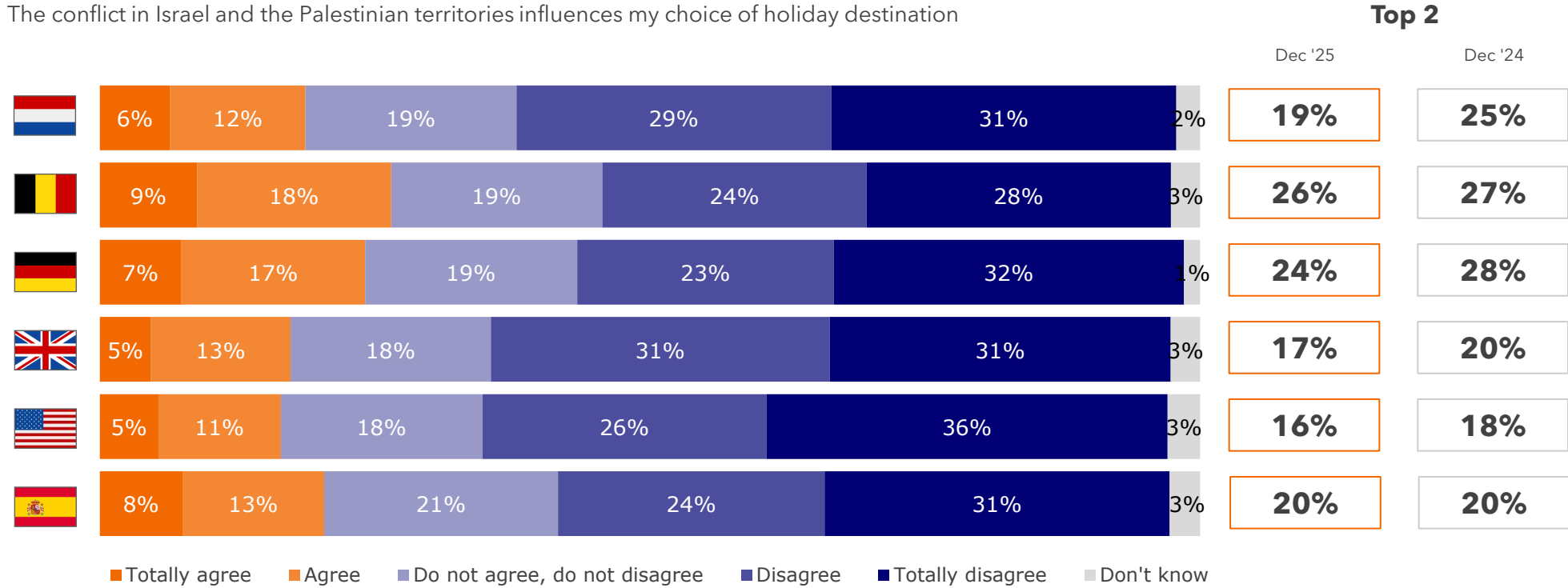
The war in Ukraine is influencing my choice of holiday destination



Basis: everyone (entire sample)  
 Rounding differences may occur in the top 2%.

Approximately one-fifth (21%) of respondents indicate that the conflict in Israel and the Palestinian territories influences their choice of holiday destination. A year ago, this figure was 23%. The top two scores currently range from 16% among Americans to 26% among Belgians.

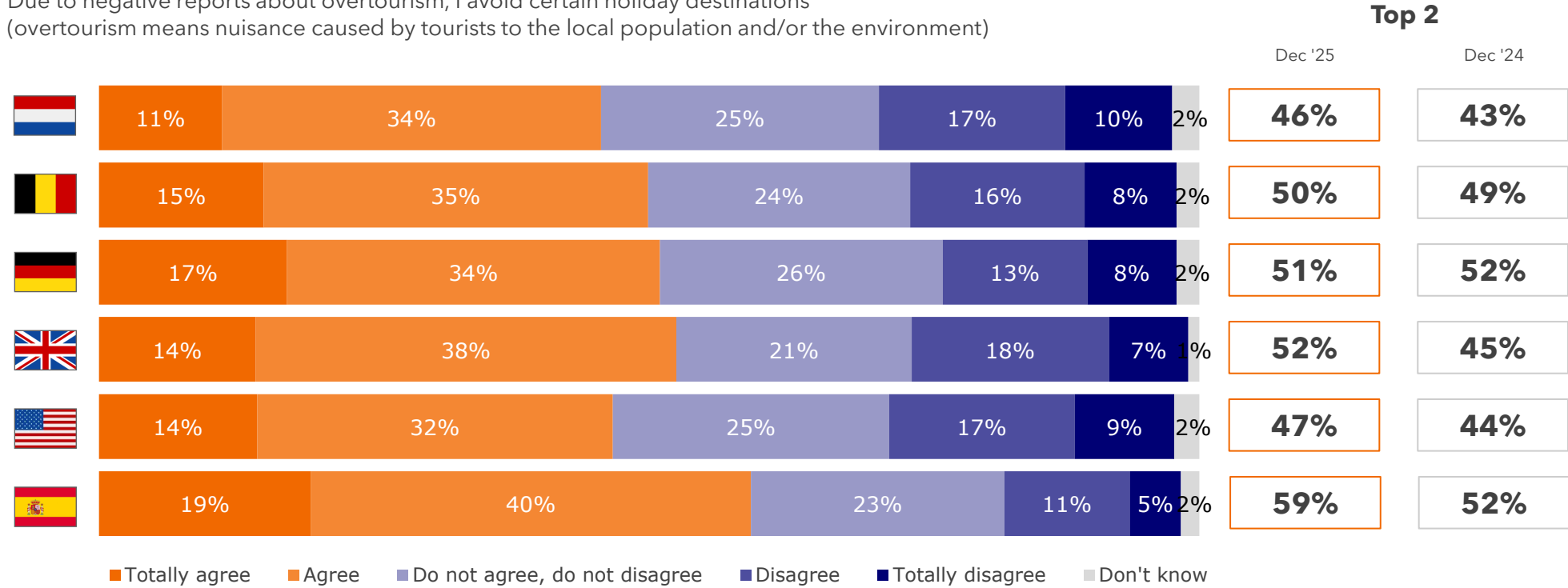
The conflict in Israel and the Palestinian territories influences my choice of holiday destination



Basis: everyone (entire sample)  
 Rounding differences may occur in the top 2%.

On average, 51% say they avoid certain holiday destinations because of negative reports about overtourism. A year ago, this average was 47%. The score is lowest among Dutch and American respondents (46% and 47%) and highest among Spanish respondents (59%). This issue is now more important to Spanish and British respondents than it was a year ago (both +7 percentage points).

Due to negative reports about overtourism, I avoid certain holiday destinations  
(overtourism means nuisance caused by tourists to the local population and/or the environment)



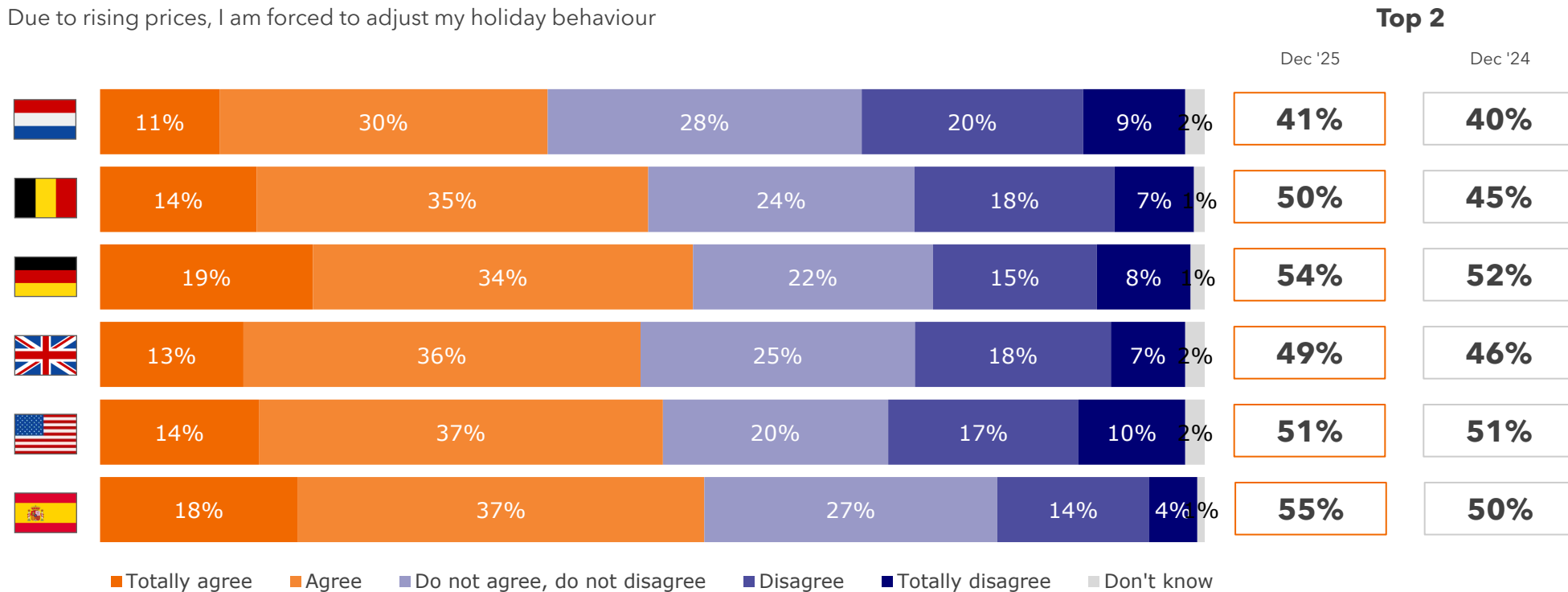
Basis: everyone (entire sample)  
Rounding differences may occur in the top 2%.



# 6. Influence of prices







Exactly half (average 50%) indicate that they are forced to adjust their holiday behaviour as a result of rising prices. A year ago, this figure was slightly lower, at an average of 47%. The Spanish and Germans agree with this statement to the highest degree (55% and 54% respectively), while the Dutch agree the least (41%).

Due to rising prices, I am forced to adjust my holiday behaviour



Basis: everyone (entire sample)  
 Rounding differences may occur in the top 2%.

When people adjust their holiday behaviour (due to higher prices), they mainly do so by choosing cheaper accommodation/stay (avg. 45%) or going on holiday less often (avg. 44%). This is followed by shortening the holiday (avg. 32%). Belgians are now choosing cheaper accommodation/stays more often as a cost-saving measure than a year ago. Also, more Belgians and Germans are choosing to save money at the destination itself, for example by eating out less often.

						
Shorter holidays	29% (29%)	28% (33%) ↓	26% (31%) ↓	30% (34%)	36% (39%)	42% (42%)
Less frequent holidays	41% (42%)	46% (44%)	50% (48%)	42% (47%) ↓	48% (43%) ↑	34% (31%)
Cheaper accommodation/stay	44% (45%)	43% (36%) ↑	46% (42%)	42% (41%)	44% (44%)	47% (50%)
Cheaper transport	16% (15%)	14% (12%)	13% (11%)	19% (16%)	21% (22%)	17% (17%)
Saving at the destination itself	28% (30%)	28% (23%) ↑	30% (25%) ↑	26% (29%)	31% (33%)	32% (29%)
Avoiding the high season	25% (23%)	25% (21%)	26% (27%)	30% (30%)	27% (25%)	22% (26%)
Other, namely	4% (3%)	2% (3%)	1% (3%)	2% (3%)	1% (1%)	1% (2%)

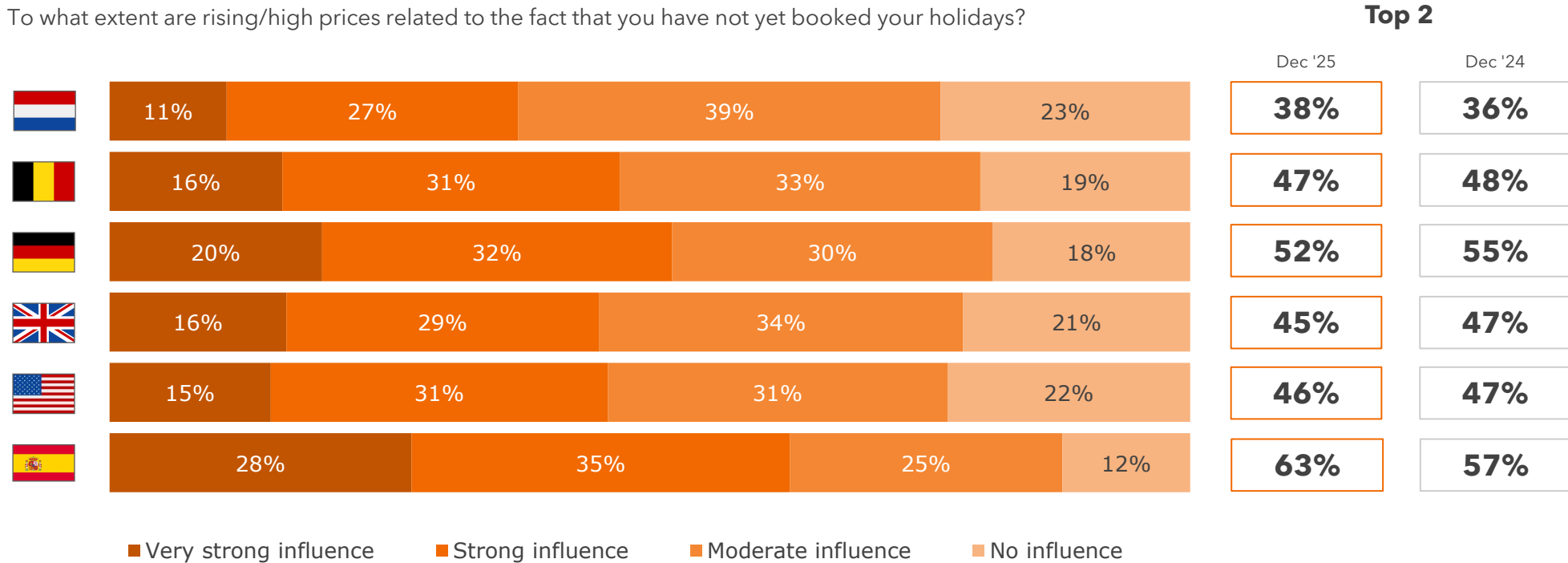
Basis: People who (completely) agree with the statement 'Rising prices are forcing me to adjust my holiday behaviour'.  
 Marking: the highest score for each country.  
 Scores from a year ago are shown in brackets. Arrow: significantly higher/lower.

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



Of those who intend to take a holiday but have not yet booked, an average of 49% indicate that rising/high prices have a (very) strong influence on their decision. The top two scores currently range from 38% among Dutch people to 63% among Spanish people.

To what extent are rising/high prices related to the fact that you have not yet booked your holidays?



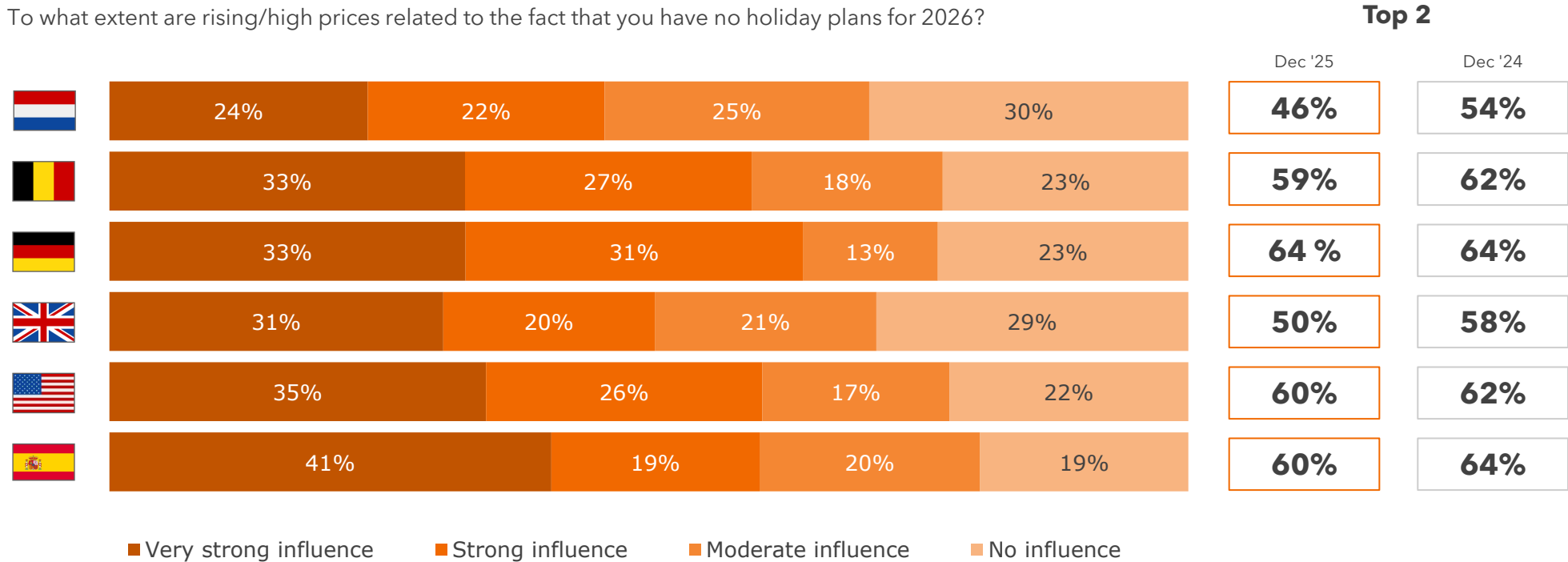
Basis: People who have not yet booked, but who intend to take a holiday in 2026. Rounding differences may occur in the top 2%.

Question: To what extent are rising/high prices related to the fact that you have not yet booked your holidays? (a year ago, the question was about 2025)



On average, 57% of people without holiday plans for 2026 indicate that rising/high prices play a (very) significant role in this. This score is lowest among Dutch people (46%) and highest among Germans (64%).

To what extent are rising/high prices related to the fact that you have no holiday plans for 2026?

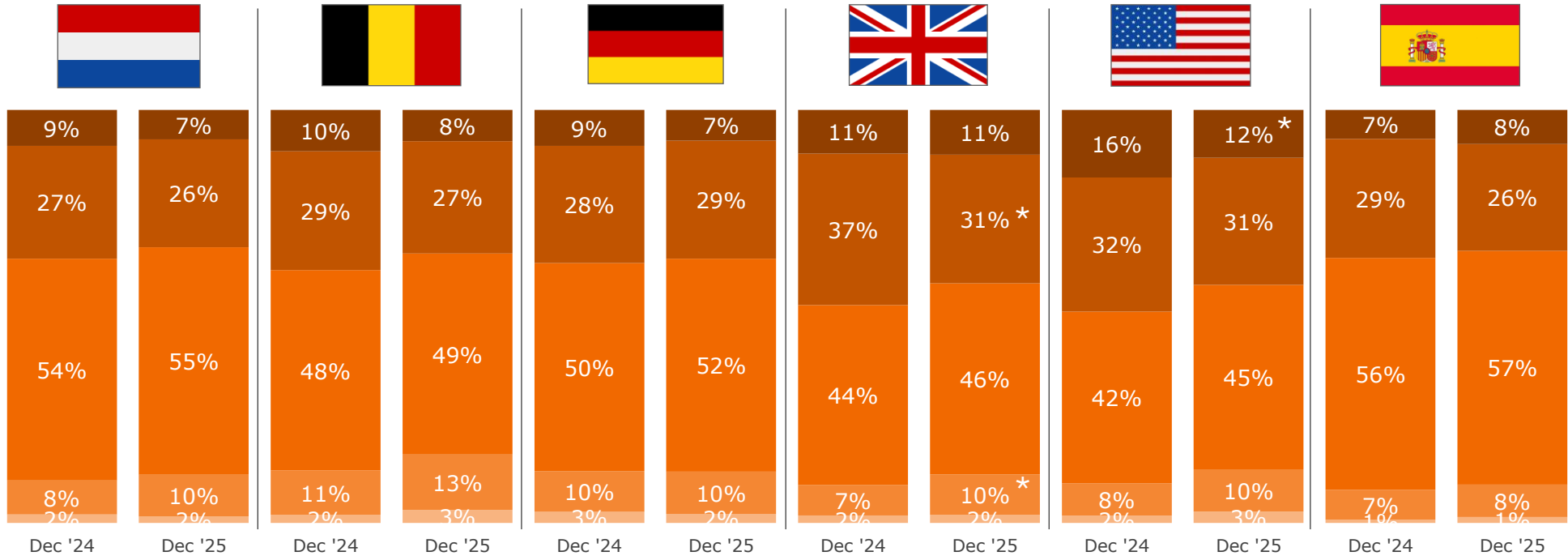


Basis: People who currently have no holiday plans for 2026. Rounding differences may occur in the top 2%.

Question: To what extent are rising/high prices related to the fact that you have no holiday plans for 2026? (a year ago, the question was about 2025)

Of the people who intend to go on holiday in 2026, an average of 51% indicate that they will have a similar holiday budget for their next holiday as in previous years. In addition, an average of 28% indicate that they will have a slightly higher budget.

The holiday budget for my next holiday in 2026 is...



Much lower
  Lower
  Similar
  Slightly higher
  Much higher







Basis: People with holiday plans for 2026 (booked or yet to book) (a year ago, the question was about the year 2025)  
 \*: significant difference compared to the measurement taken 1 year ago

Question: Which situation applies most to you?



Approximately one-fifth of respondents are unable to indicate how they perceive the prices of accommodation (hotels and holiday parks) in the countries listed below. This shows that people are not always aware of prices across the border. In their own country, they generally have a (much) better idea of this and are less likely to answer 'don't know'. The Dutch and Belgians are most likely to answer 'don't know' when asked about their experience of prices in the United Kingdom.

How do you perceive the prices of accommodation (hotels and holiday parks) in the following countries?  
 Below is the percentage who answered 'don't know'.

						
In the Netherlands	6%	18%	20%	23%	29%	17%
In Belgium	22%	8%	27%	24%	30%	17%
In Germany	18%	23%	6%	22%	25%	15%
In the United Kingdom	34%	28%	23%	5%	24%	12%
In France	24%	13%	19%	16%	22%	11%







Basis: everyone (entire sample).  
 Percentage: answered 'don't know'.

Question: How do you perceive the prices of accommodation (hotels and holiday parks) in the following countries?



More Spanish respondents perceive the prices of accommodation (hotels and holiday parks) in the countries listed below to be (very) high, compared to people surveyed in the other five countries. Among the five destinations listed below, the United Kingdom is perceived as having the highest accommodation prices. Americans, however, consider accommodation prices to be highest in France, while the Dutch perceive prices to be highest in their own country.

How do you perceive the prices of accommodation (hotels and holiday parks) in the following countries? Below is the percentage that answered 'high or very high' (on a 7-point scale from very low to very high). All respondents who answered 'I don't know' have been excluded from this analysis.

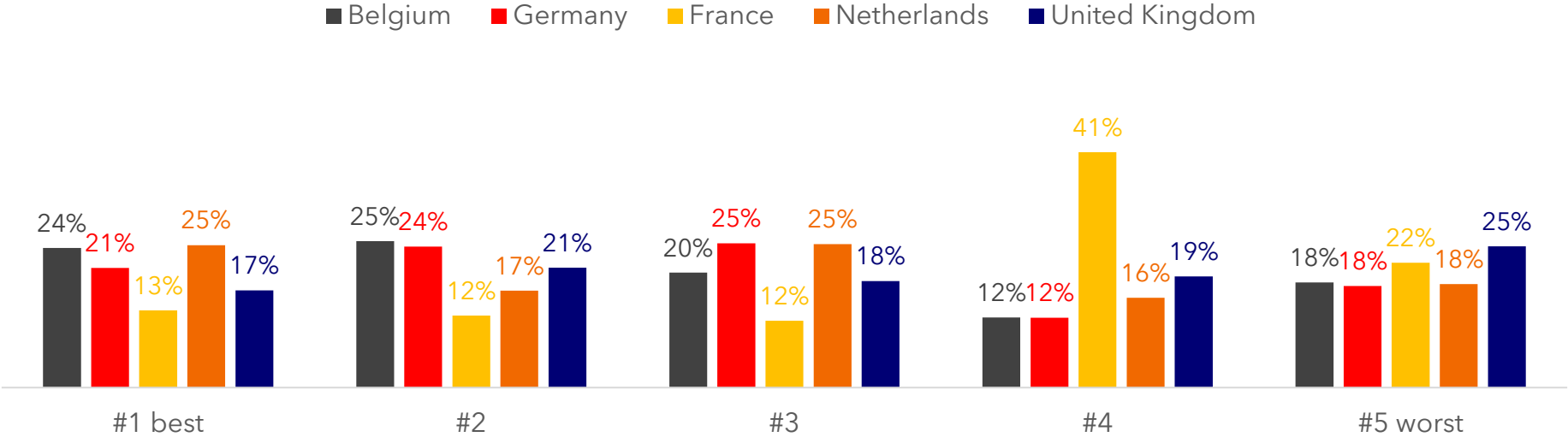
						
In the Netherlands	42%	20%	25%	21%	26%	45%
In Belgium	15%	27%	20%	18%	26%	43%
In Germany	15%	18%	28%	19%	26%	47%
In the United Kingdom	38%	42%	41%	38%	36%	53%
In France	25%	27%	32%	26%	40%	51%

Basis: everyone (entire sample).  
 Percentage: answered 'high or very high'.  
 Highlighted: the highest percentage per surveyed country.

Question: How do you perceive the prices of accommodation (hotels and holiday parks) in the following countries?

The Netherlands is most frequently ranked in first place (25%) in terms of value for money of accommodation (hotels and holiday parks). Belgium also ranks highly in terms of best value for money (24% #1). The United Kingdom was ranked most often as having the worst value for money of accommodation. This was the ranking given by 6,000 respondents from six countries. In fourth place, representing the second poorest price-quality ratio, France stands out with 41%.

How do you rate the value for money of accommodation (hotels and holiday parks) in the following countries?  
 Rank the countries, where 1 = the best value for money and 5 = the worst value for money.  
 Below are the totals for 6,000 respondents (from the Netherlands, Belgium, Germany, the UK, the US and Spain).



Basis: everyone (entire sample).

Question: How do you rate the value for money of accommodation (hotels and holiday parks) in the following countries? Rank the countries, where 1 = best value for money and 5 = worst value for money.







## About the Holiday Sentiment Monitor

Twice a year, the Holiday Sentiment Monitor (HSM) of the Netherlands Board of Tourism & Conventions (NBTC) provides insight into the holiday intentions of Dutch citizens and residents of the international core markets of Belgium, Germany, the United Kingdom and the United States. Spain has also been added to this edition due to growing visitor numbers.

This monitor examines how current events such as economic conditions, climate and geopolitical developments influence holiday behaviour. The HSM supports the tourism sector and policymakers in responding to changing preferences and market developments.

Element	Description																																												
<b>Method</b>	Online questionnaire																																												
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## Colophon & contact

January 2026

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