Holiday Sentiment Monitor

July 2025

Take outs

1. **Holiday intention of Dutch, German and British stable. Among Americans a big drop.**
On average, 84% of those surveyed intend to go on holiday in the next 12 months. A year ago, the average was 87%. Among Americans, holiday intention has dropped from 84% to 75% compared to a year ago. Currently, holiday intention is highest among the Dutch and the British (both 88%). Among Belgians and Germans, it is 84%.

2. **49% have already booked a holiday, with many people leaving in June, July and August.**
The share that has already booked a holiday is similar to a year ago (50% on average then). The Dutch and British currently have the highest proportion 'already booked' (53% and 51%). Among Americans, it is lowest (42%). Three quarters of those who have already booked indicate that their next holiday will be in June, July or August. Among the Dutch, July stands out the most, with 30%.

3. **Market potential: 35% of those surveyed have holiday intentions but have yet to book. The Dutch book on relatively short notice.**
35% of those surveyed say they have yet to book but have holiday intention for the next 12 months. Of that group, 63% are already planning. They mostly focus on the months of August (average 26%) and September (average 24%). Among the Dutch, however, July is the month most often looked at (25%). Of this group planning for a holiday, the largest group plans to book within 3 to 4 weeks (average 32%). Among Dutch people, the group planning to book within 1-2 weeks is also relatively large (30%).

4. **The Dutch are going more for holidays in their own country or an intercontinental trip. Fewer holiday plans (elsewhere) in Europe.**
Fewer Dutch people are planning to spend their next holiday (elsewhere) in Europe, compared to a year ago. So, there are more plans for domestic holidays and intercontinental trips. The share of Dutch travellers taking domestic holidays of 15 nights or longer has doubled compared to a year ago (from 4% to 8%). Furthermore, Germans are (also) planning more holidays in their own country. Among Brits and Americans, the picture is the opposite; their holiday plans in their own country are lower than a year ago.

5. **North Holland and Limburg most chosen provinces for domestic holidays.**
Dutch people who want to spend their next holiday or weekend away in the Netherlands say they most want to do so in North Holland (19%). This is followed by Limburg (15%) and despite Gelderland having dropped compared to last year, it is still in third place (10%). Compared to a year ago, North Brabant has also dropped. Furthermore, Dutch people aged 18-44 are more likely to choose provinces such as Noord-Holland and Utrecht, and over-45s are more likely to choose Drenthe and Limburg.

Take outs

6. **Spain is the favourite European destination among Dutch, Germans and British.**
Spain is the most popular European holiday destination. Among the Dutch, Germans and British, Spain tops the top 5 with a high score. Among Belgians, France is the favourite holiday country, followed by Spain. The Netherlands takes the final spot, along with Germany and Portugal who are also in fifth place. Among Germans, the Netherlands ranks sixth, so just outside the top 5.

7. **The Dutch travel less by plane and more often by train or motorhome to European destinations.**
Dutch people who go on holiday (elsewhere) in Europe, take the plane less often. The car remains at the same level as a year ago. They mainly go by train and motorhome. Among the British, the share of planes also decreased. There are also differences by age group. Dutch people aged 18-24 go to their European destination by car more than a year ago. The group that most often goes to their European destination by plane is 25-34 years old. Especially among 35-44 and 65+, the share of train is higher this year than a year ago. Among 55-64-year-olds, the share of campervans is relatively high, and among 65+ this is true of coaches.

8. **Relaxing, being together with friends/family and escaping one's surroundings are the main holiday motivations.**
This applies to all five countries surveyed. Furthermore, among Dutch solo travellers, 'time for myself / self-reflection' and 'having unique experiences' are also important motivations. When it comes to sources of information for choosing their next holiday, clear differences are visible. Older Dutch travellers are more likely to choose their next destination based on previous experience compared to younger travellers. Among younger groups, it is notable that they more often use AI or ChatGPT as an information source, as well as social media and social travel platforms such as Airbnb.

9. **Crowds and prices play most important role in choice of holiday destination.**
Half of those surveyed (51%) avoid certain holiday destinations because of (negative reports of) over-tourism. Two thirds of holidaymakers also indicate that they consider 'staying in a quiet place' important. In addition, on average 50% indicate that they have to make other choices because of rising prices, such as by going on holiday less often and/or choosing cheaper accommodation. Furthermore, sustainability considerations and chance of extreme weather are also factors for more than 40% of those surveyed. Finally, 55% of Americans express concern that political tensions may affect how Americans are perceived abroad when travelling internationally.

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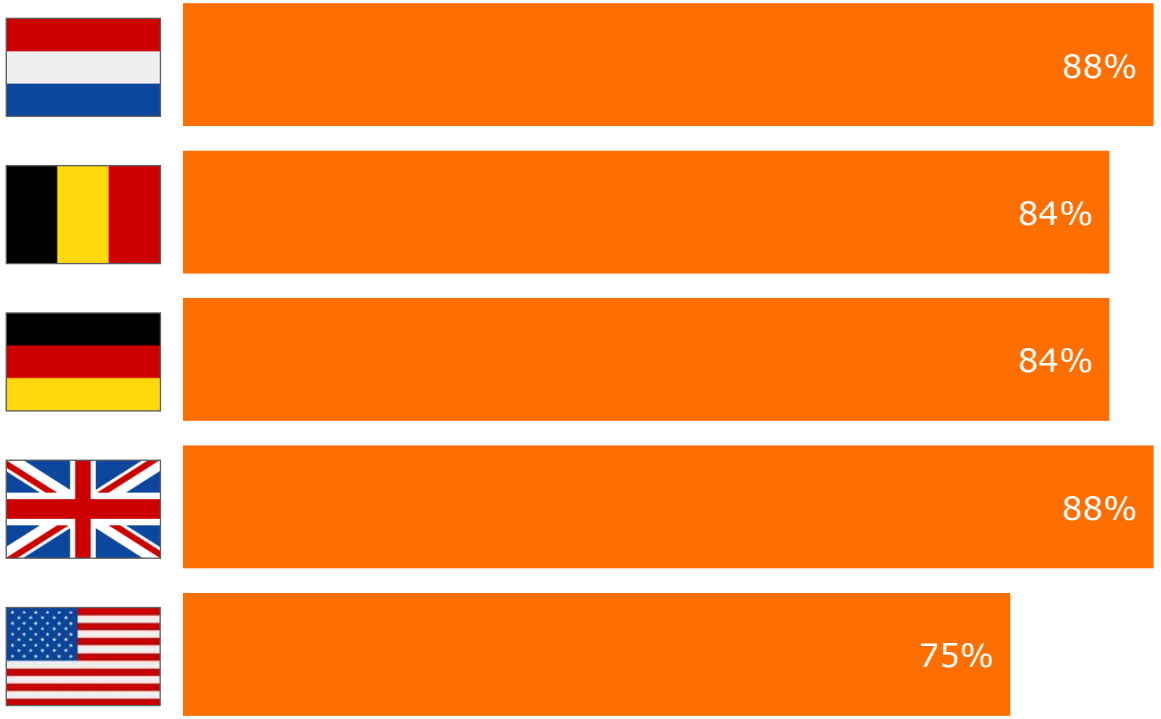
1. Holiday planning results

Holiday intention for the next 12 months is highest among Dutch and British people (both 88%) and lowest among Americans (75%). Of those with holiday intention, some have already booked and some have yet to book. These can be short or long holidays at home or abroad.

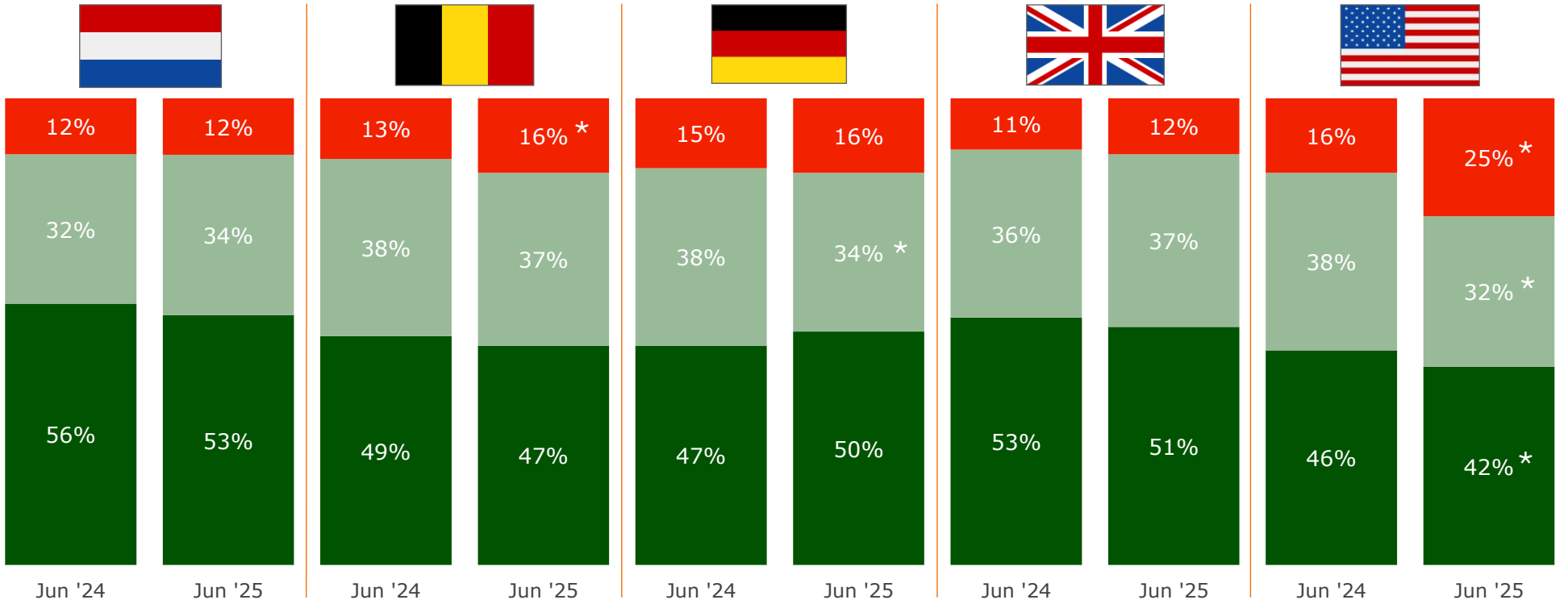


Holiday intention for next 12 months (% top 2):

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

Holiday intention 1/2

On average, 49% have already booked a holiday for the next 12 months. A year ago, this was 50%. The Dutch and British currently have the highest proportion 'already booked' (53% and 51%). Among Americans, holiday intention has fallen compared to a year ago. Among Belgians, this intention has also declined slightly. Among the Dutch, the picture has remained the same.

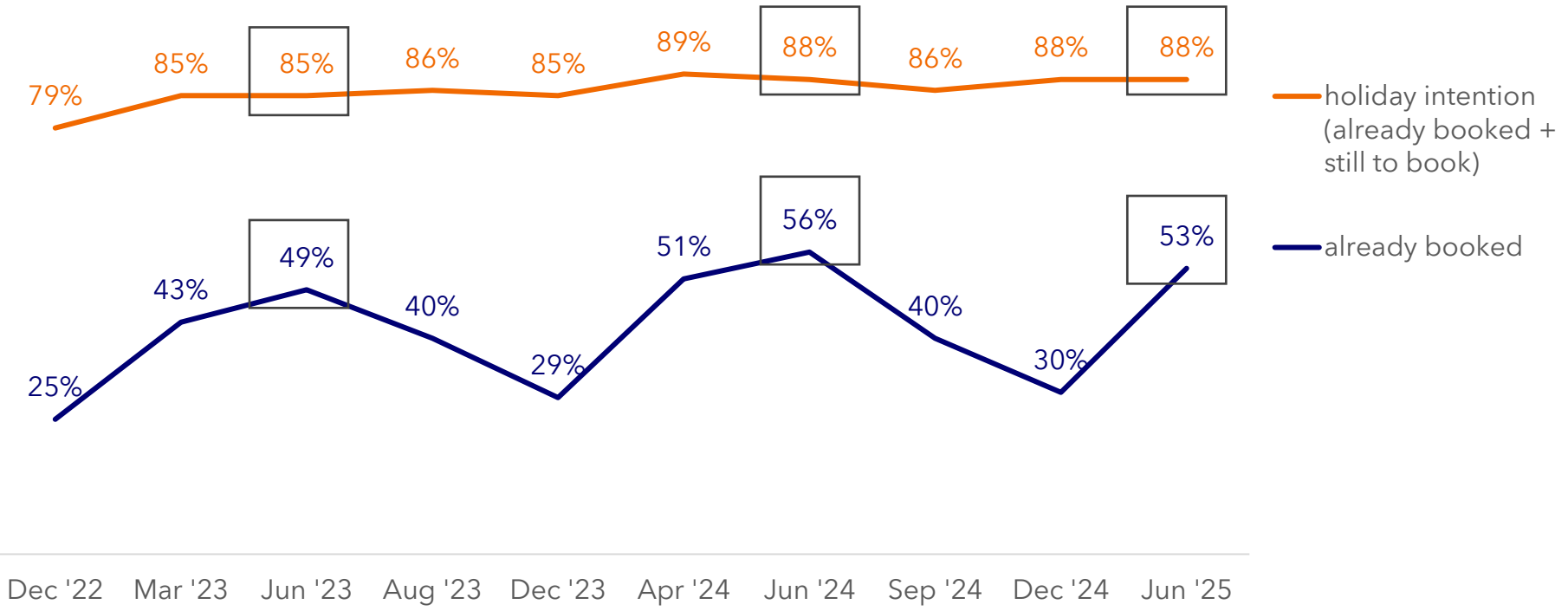


Base: everyone (entire sample)
*: significant difference compared to the measurement 1 year ago

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

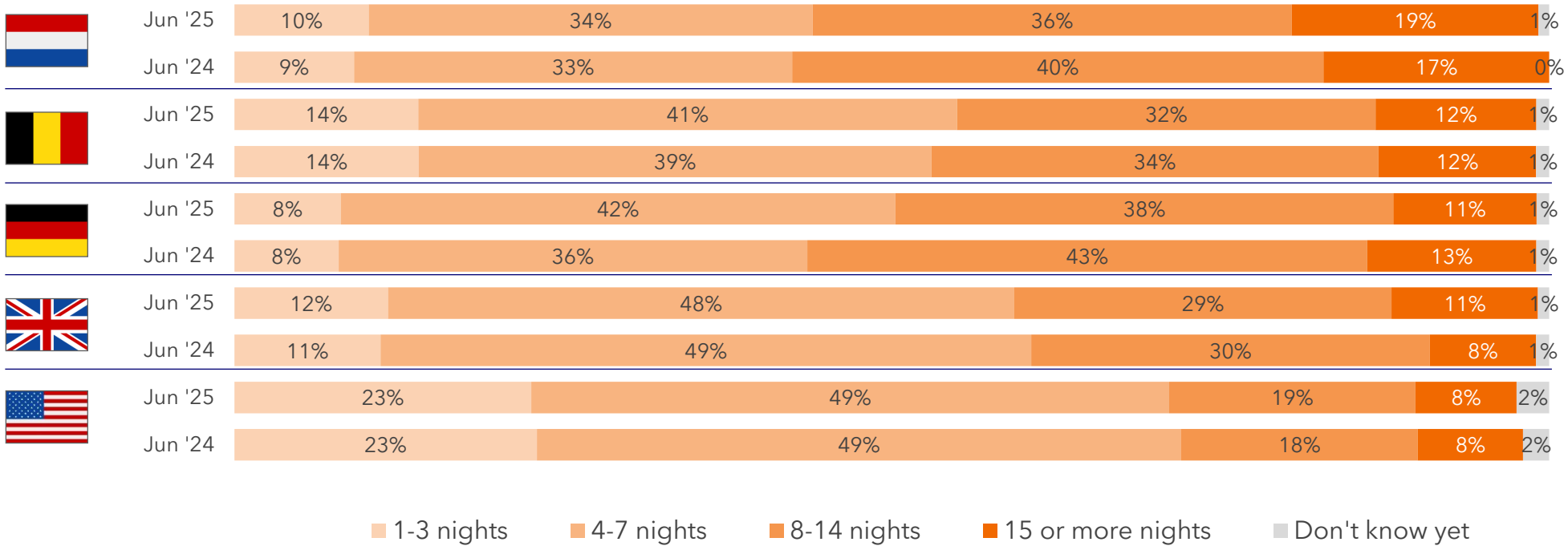
Holiday intention 2/2

Holiday intention (already booked + still have to book) has been stable among Dutch people for quite some time. A year ago, it was also exactly 88%. The share of Dutch people who have already booked is now 53%, where it was 56% a year ago. The annual pattern is that the share of 'already booked' is lower in the winter months and rises in spring / towards summer. In each case, this concerns a holiday intention in the next 12 months (and in the December measurement about the coming calendar year).



Holiday intention over time (NL)

On average, the majority of respondents with a holiday intention are going away for 4-7 nights for their next holiday (average 42%). After that, the 8-14 nights category is the most frequently chosen (average of 31%). A year ago, this was a similar pattern. Among Americans, the proportion of short holidays is highest compared to other countries; 23% go away for 1-3 nights.

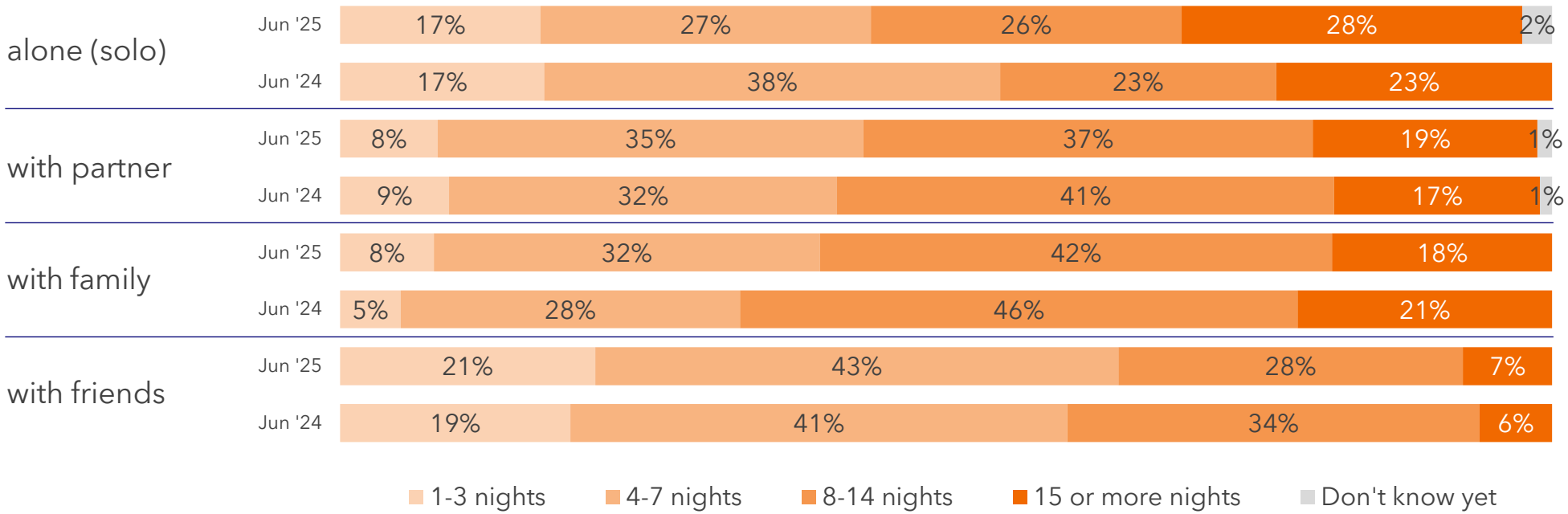


Base: People with holiday plans for the next 12 months (booked or yet to book)

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

Number of nights

Among Dutch solo travellers, compared to a year ago, an increase in longer holidays is visible. Among family holidays or holidays with friends, the proportion of shorter holidays has actually increased.

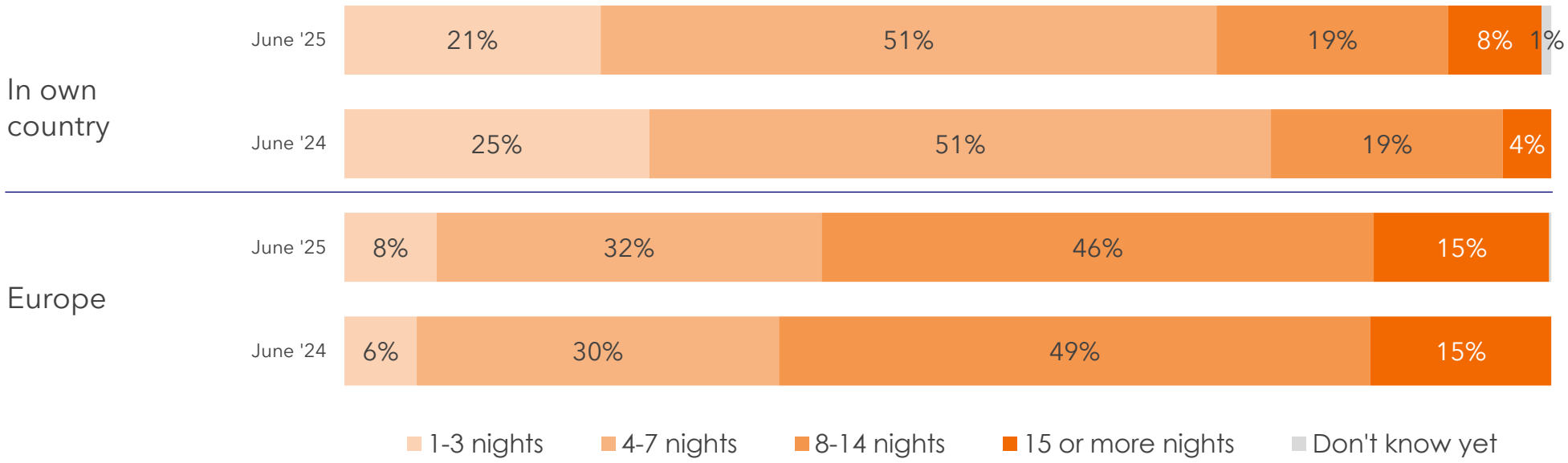


Base: People with holiday plans for the next 12 months (booked or yet to book)
Note: The most common types of travel company are shown here

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

Number of nights vs. travel companion (NL)

Of Dutch people spending their next holiday in their own country, 21% are going for a short holiday (1-3 nights). A year ago, this was 25%. The share of '15 or more nights' is actually higher now (8% instead of 4%). When it comes to a holiday destination (elsewhere) in Europe, 8-14 nights is the most frequently chosen length of stay by Dutch people (46%), although a shorter European holiday (up to 7 nights) is chosen slightly more often than a year ago.



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 vs destination (NL)

Most people booked directly with the provider (average 50%). A year ago, the average for these five countries was 49%. Most Americans who have already booked a holiday say they did so directly with the provider (61%). Additionally, Germans book relatively frequently through a travel organisation/booking website (42%).

Directly with the provider (e.g. directly with the hotel/accommodation/transport company)	51% (46%)	46% (43%)	44% (41%)	47% (48%)	61% (66%)
Via a travel organisation/ -agency or booking website	37% (41%)	38% (44%)	42% (44%)	34% (40%)	16% (15%)
A combination of the above two options	8% (10%)	8% (9%)	9% (12%)	16% (9%)	17% (14%)
Other, namely	2% (3%)	6% (3%)	3% (2%)	3% (2%)	4% (4%)
Do not know	1% (1%)	1% (0%)	1% (2%)	0% (0%)	2% (2%)

For 'other, namely' people mentioned their own holiday home or (holiday) home of friends/family.

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

Questionnaire: How is your next holiday booked?

Among those who have already booked a holiday, the next holiday is mostly in July (average 28%) and June (average 24%). Germans chose June more as departure month than a year ago. July and August were booked less by them. Among Belgians and Brits, on the contrary, June was booked less often. However, the percentage of Brits who booked for September is now higher.

2026	January	1% (0%)	0% (0%)	1% (1%)	1% (1%)	1% (2%)
	February	2% (1%)	0% (1%)	1% (1%)	1% (0%)	2% (1%)
	March	1% (1%)	2% (1%)	1% (1%)	1% (1%)	3% (1%)
	April	1% (1%)	1% (0%)	2% (1%)	1% (1%)	1% (1%)
	May	2% (2%)	3% (1%)	3% (2%)	2% (2%)	1% (3%)
2025	June	21% (21%)	19% (23%)	25% (19%)	23% (28%)	32% (31%)
	July	30% (34%)	37% (36%)	23% (27%)	25% (24%)	23% (25%)
	August	22% (23%)	20% (21%)	20% (24%)	18% (20%)	17% (18%)
	September	12% (12%)	12% (13%)	16% (16%)	17% (13%)	10% (8%)
	October	5% (5%)	4% (4%)	5% (5%)	6% (6%)	5% (6%)
	November	2% (1%)	2% (1%)	1% (2%)	3% (3%)	4% (2%)
	December	2% (1%)	1% (0%)	2% (1%)	2% (1%)	1% (2%)
	Total	**100%**	**100%**	**100%**	**100%**	**100%**

Base: people who have already booked a holiday.
Highlight: the highest percentage per country.
In brackets the scores from a year ago.

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

Departure month of already booked holiday

Of the Dutch who have already booked a family holiday, three quarters go in the month of July or August. By comparison, of Dutch people going on holiday with their partner, 'only' 34% go in July or August. Among them, June is the most popular month. By groups of friends, June and July are the most booked months. Among solo travellers, it is noticeable that a relatively large number is already booked for January.

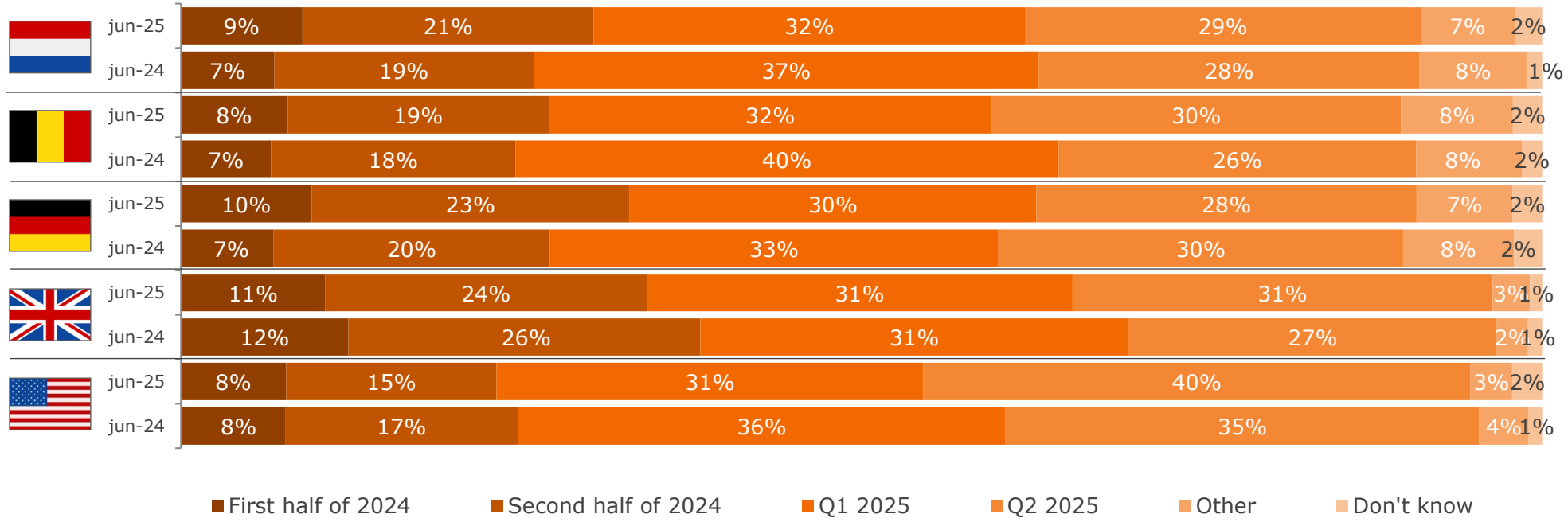
		Alone (solo)*	With partner	With family	With friends*
2026	January	7%	1%	0%	0%
	February	3%	2%	1%	0%
	March	0%	2%	1%	0%
	April	3%	2%	0%	0%
	May	5%	2%	1%	0%
2025	June	13%	31%	11%	26%
	July	25%	18%	45%	26%
	August	18%	16%	29%	24%
	September	16%	17%	7%	12%
	October	5%	6%	3%	8%
	November	3%	2%	0%	2%
	December	2%	2%	1%	2%
	Total	**100%**	**100%**	**100%**	**100%**

Base: people who have already booked a holiday
Highlight: 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?
*Note: for the 'Alone' and 'With friends' categories, the n is around 50 a 60.

Departure month vs. travel companion (NL)

The Dutch and Germans booked longer in advance than a year ago. A higher proportion already booked their upcoming holidays in the previous calendar year. Belgians, Brits and Americans, on the other hand, booked more recently; booking for their upcoming holidays was done more in Q2 (Apr/May/Jun) than it was a year ago.



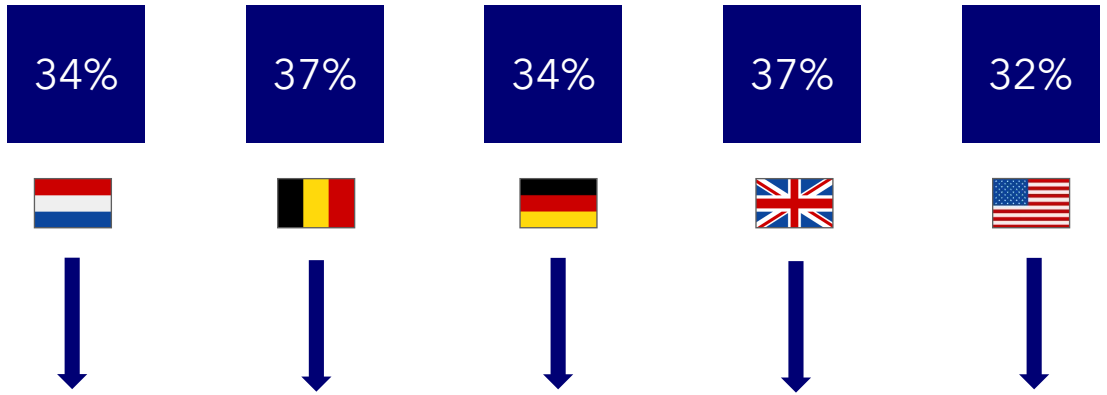
Base: People who have already booked holidays for the next 12 months
The June 2024 measurement covered first and second half of 2023 and Q1 and Q2 of 2024.

Questionnaire: When did you book your next holiday?

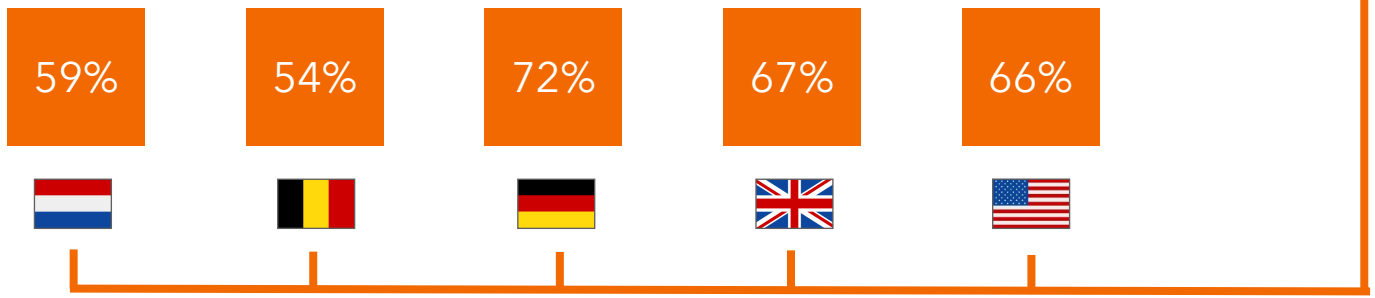
Booking period of already booked holidays

On average, 35% 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 63% is planning a holiday. In this regard, the months of August (average 26%) and September (average 24%) are currently the most looked at. Among the Dutch however, July is the month most often looked at.

Holiday intention but have yet to book

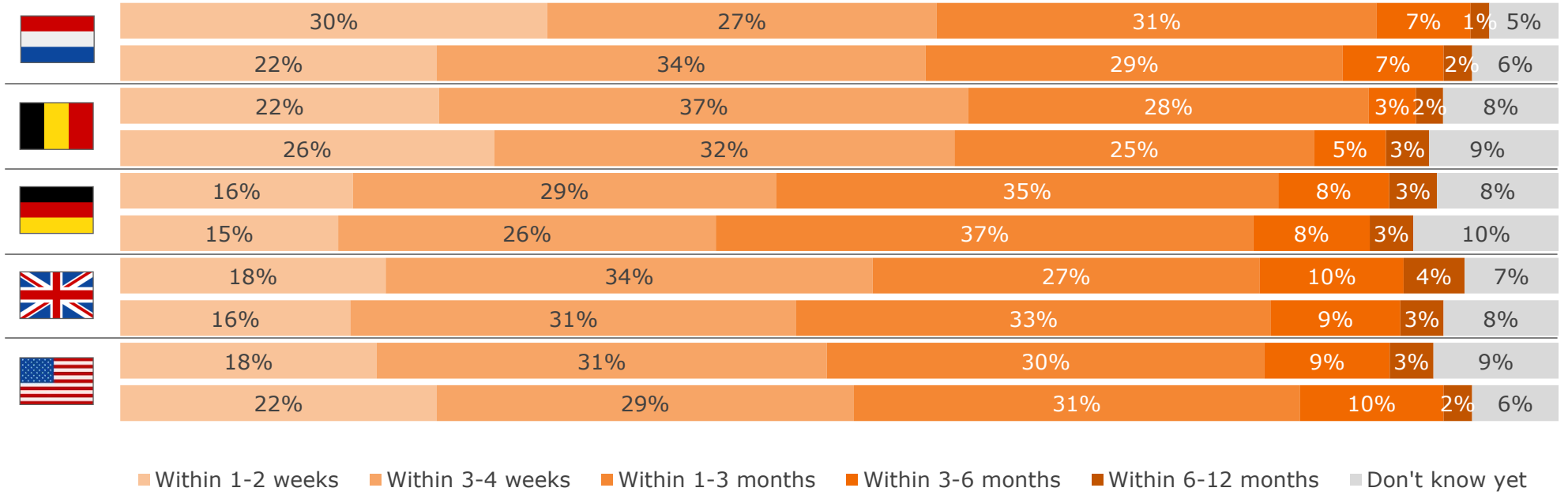


Planning for holidays



2026 January	1%	0%	0%	1%	3%
2026 February	1%	1%	1%	1%	1%
2026 March	0%	1%	1%	1%	1%
2026 April	3%	0%	0%	1%	0%
2026 May	1%	2%	0%	3%	1%
2025 June	7%	7%	7%	4%	7%
2025 July	**25%**	23%	15%	19%	23%
2025 August	22%	25%	**32%**	**25%**	**25%**
2025 September	23%	**31%**	29%	23%	15%
2025 October	9%	5%	7%	9%	11%
2025 November	3%	2%	6%	5%	6%
2025 December	3%	2%	2%	8%	7%
Number	**N=229**	**N=212**	**N=272**	**N=260**	**N=230**

Among people who are planning a holiday, the largest group plans to book it within 3 to 4 weeks (32% on average). In addition, an average of 30% say they plan to book within 1-3 months. The group that wants to book within 1-2 weeks is relatively large among Dutch people; this is now 30%, compared to 22% a year ago.



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

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

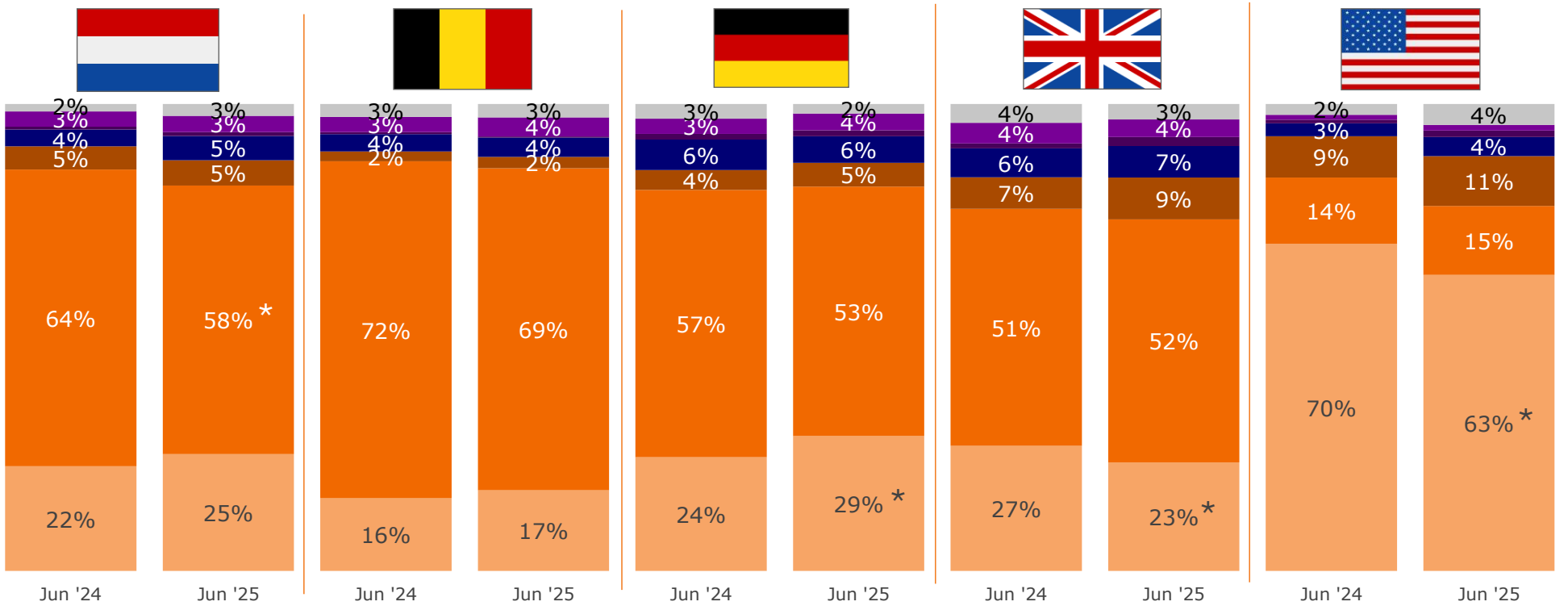
On average 63% of the people who have not yet booked, but do intend to go on holiday in the next 12 months, are already planning an upcoming holiday. If people have a holiday intention but are not yet planning, it is mainly because they have not yet got around to it (average 22%) or their financial situation does not allow it (average 9%). The latter reason is highest among Americans (11%).

Yes (already exploring)	59% (67%)	54% (53%)	72% (71%)	67% (61%)	66% (65%)
No, I have not got around to planning yet	26% (22%)	31% (32%)	13% (13%)	23% (22%)	20% (21%)
No, my financial situation does not allow it (e.g. due to inflation and rising prices)	9% (6%)	9% (10%)	7% (9%)	7% (11%)	11% (11%)
No, because of uncertainties regarding current wars	3% (2%)	5% (4%)	6% (6%)	1% (2%)	3% (1%)
No, for another reason	3% (3%)	2% (1%)	2% (1%)	3% (4%)	1% (2%)

Base: People who have not yet booked (but have holiday intentions for the next 12 months)
In brackets the scores from a year ago.

Q: Are you already planning on your upcoming holiday?

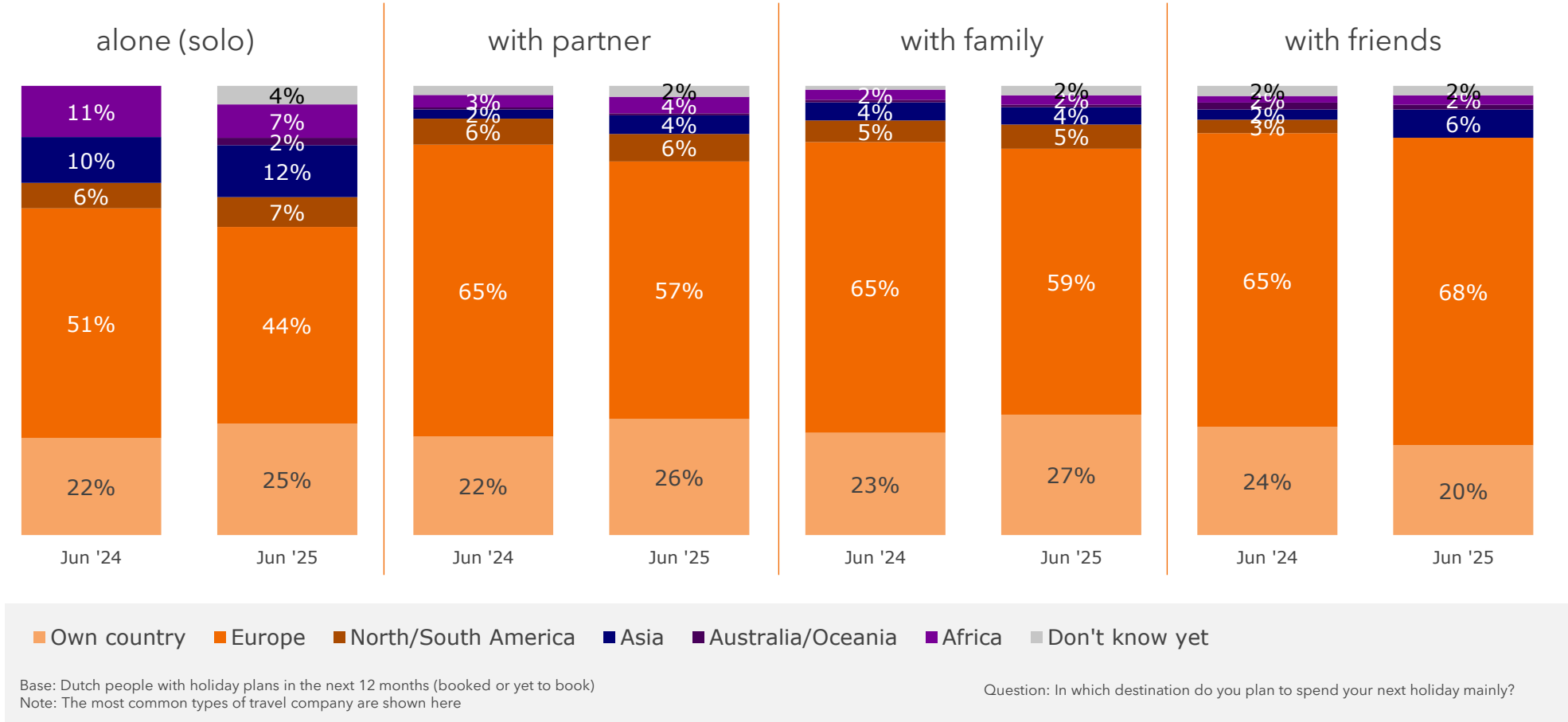
The Dutch are planning their next holiday less in Europe (elsewhere) than a year ago. So there are more plans for domestic holidays and intercontinental trips. Furthermore, Germans are (also) planning more holidays in their own country. Among Brits and Americans, the picture is the opposite; holiday plans in their own country are lower than a year ago.



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

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

Of the four groups, three are choosing to spend their next holiday in the Netherlands (own country) more than a year ago. However, among groups of friends, this is not the case. If own country is chosen more often this year than last year, then this is 'at the expense' of holidays elsewhere in Europe.

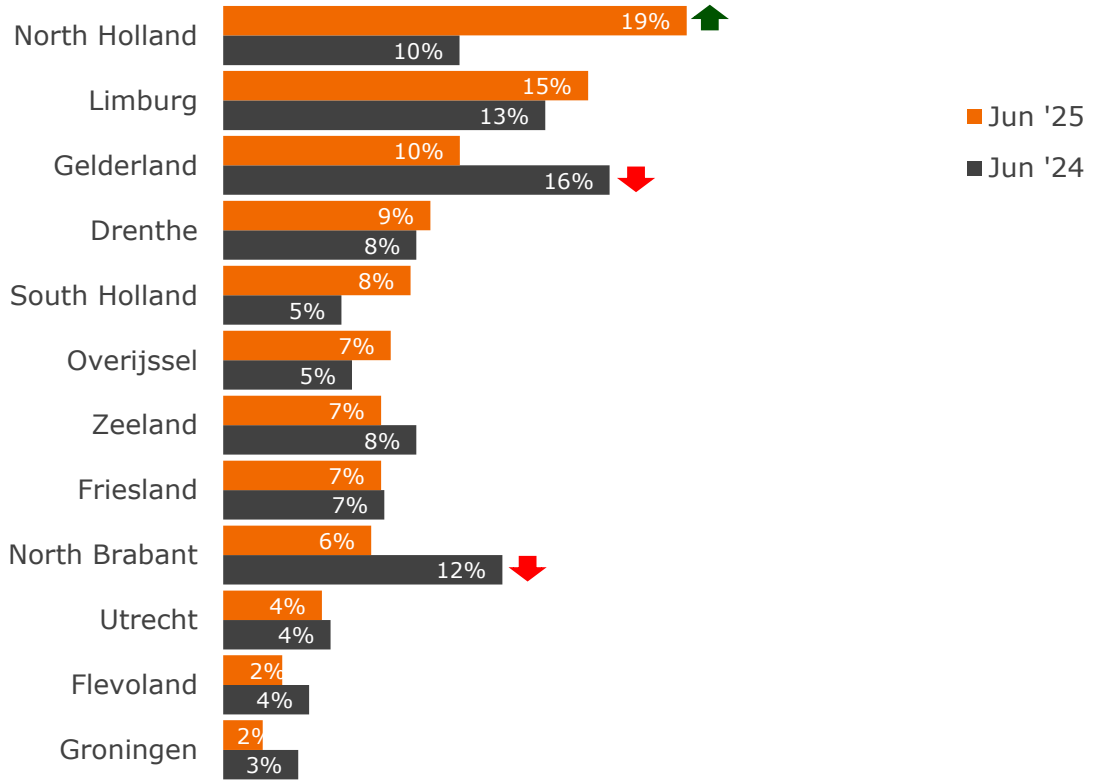


Base: Dutch people with holiday plans in the next 12 months (booked or yet to book)
Note: The most common types of travel company are shown here

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

Region/continent vs. travel companion (NL)

Dutch people who want to spend their next holiday or weekend away in the Netherlands say they most want to do so in North Holland (19%). This is followed by Limburg (15%) and despite Gelderland dropping compared to last year, it is still in third place (10%).

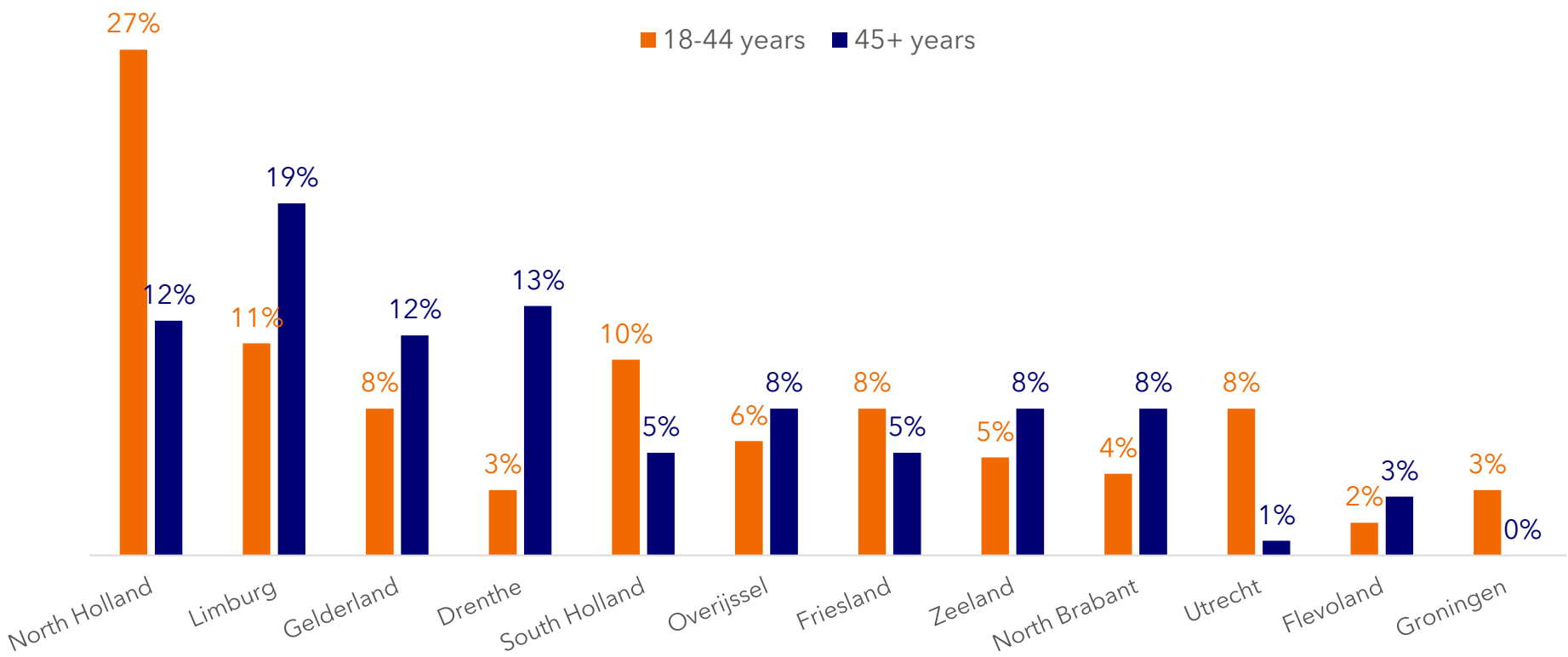


Base: Dutch people with holiday plans in the Netherlands (booked or yet to book)
Arrow: significant difference compared to a year ago

Question: In which province are you planning to spend your next holiday (in Holland) mainly?

Destination province for Dutch holidaymakers 1/2

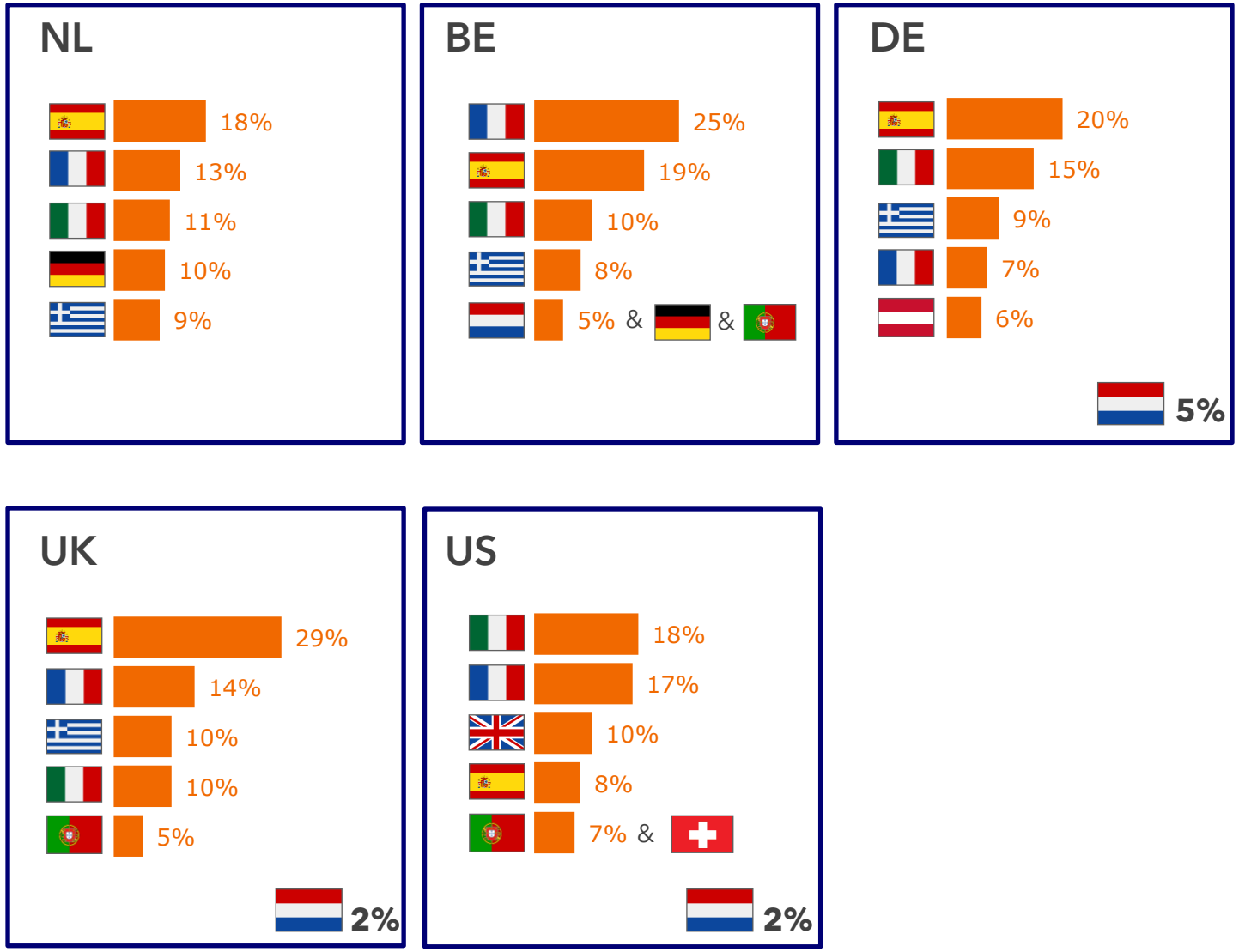
Among Dutch people planning to spend their next holiday in the Netherlands (own country), a difference can be seen in age categories. For example, 18-44 year olds go more to the provinces of North Holland and Utrecht, while 45-plus opt more for Drenthe and Limburg, among others.



Basis: Dutch people with holiday plans in the Netherlands (booked or yet to book)

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

Destination province for Dutch holidaymakers 2/2



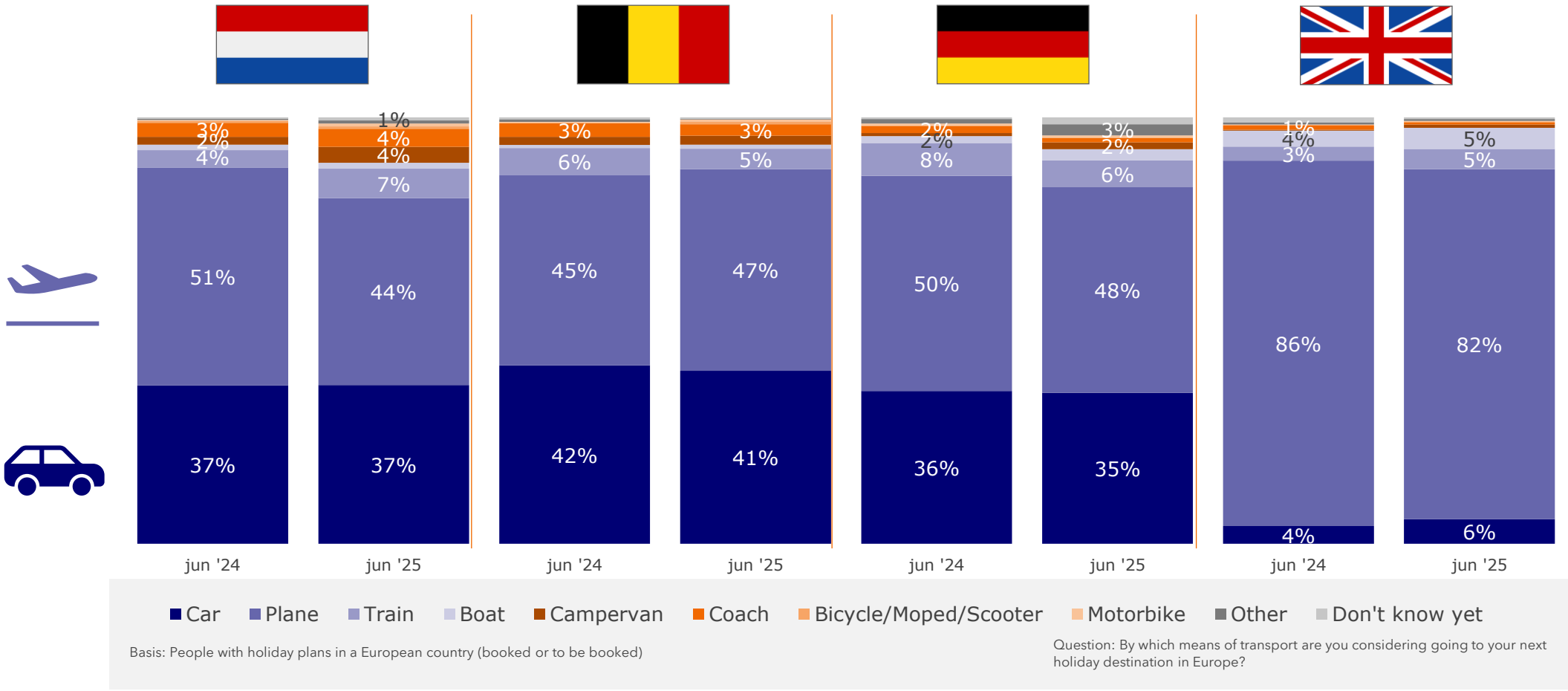
- Spain is the most popular European holiday country. Among the Dutch, Germans and British, Spain tops the top 5.
- Among Belgians, France is the favourite holiday country, followed by Spain. The Netherlands closes the top 5 among Belgians, in a shared spot with Germany and Portugal.
- Among Germans, the Netherlands ranks sixth, so just outside the top 5.
- Besides Spain, Italy and France are also popular holiday destinations in Europe.
- Finally, Greece is also popular. This country features in almost every top 5, except for Americans.
- 'Own country' has not been included in these top 5 European destinations.

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

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

Top 5 European destinations

While for UK, Germany and Belgium the picture is quite similar to a year ago, a striking difference is visible among Dutch people. Dutch people who go on holiday (elsewhere) in Europe are taking the plane to a lesser extent. The car remains at the same level as last year, but the share going by train has increased. Among the British, the plane share has also decreased.

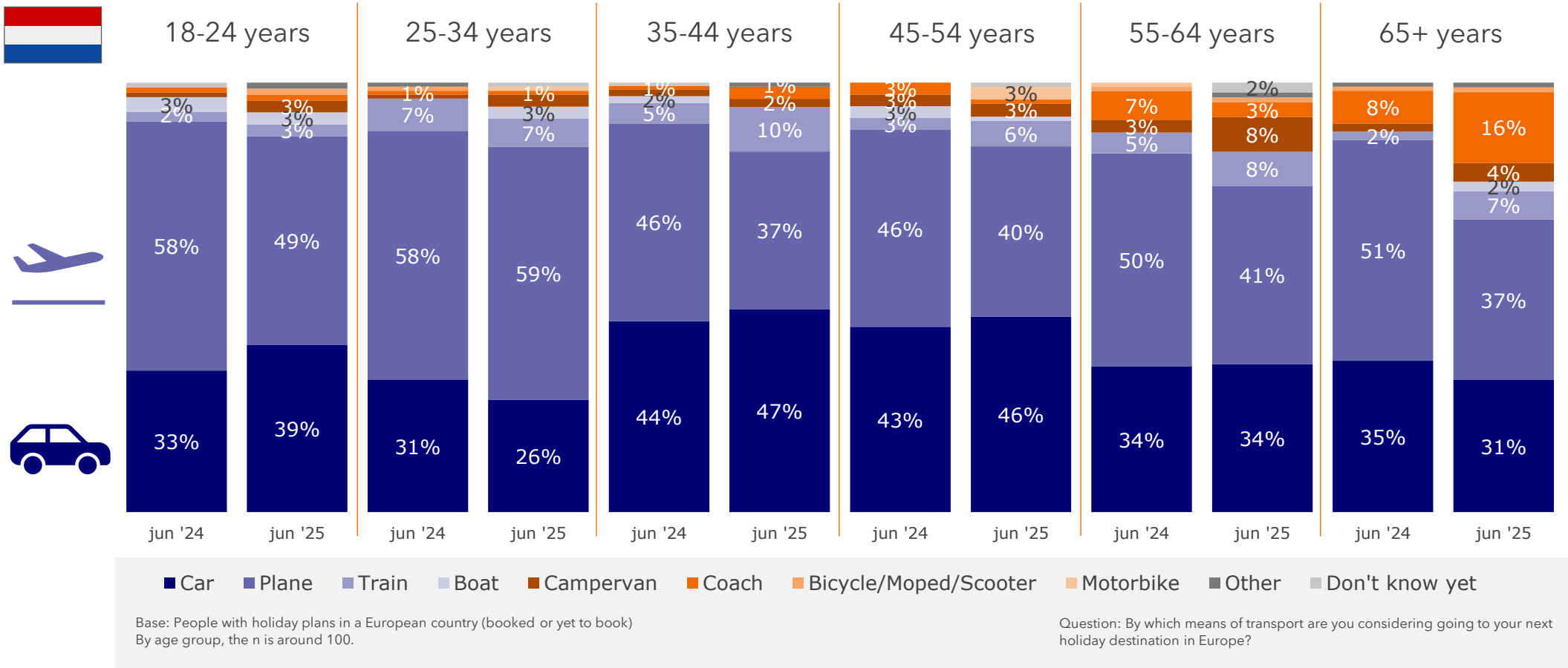


Basis: People with holiday plans in a European country (booked or to be booked)

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

Means of transport for European holidays

Dutch people aged 18-24 go to their European destination by car more than a year ago. The group going most often by plane to their European destination is 25-34. The share of train is higher this year among 35-44 and 65+, than a year ago. Among 55-64-year-olds, the share of campervans is relatively high, and among 65+ this is true for travel by coach.

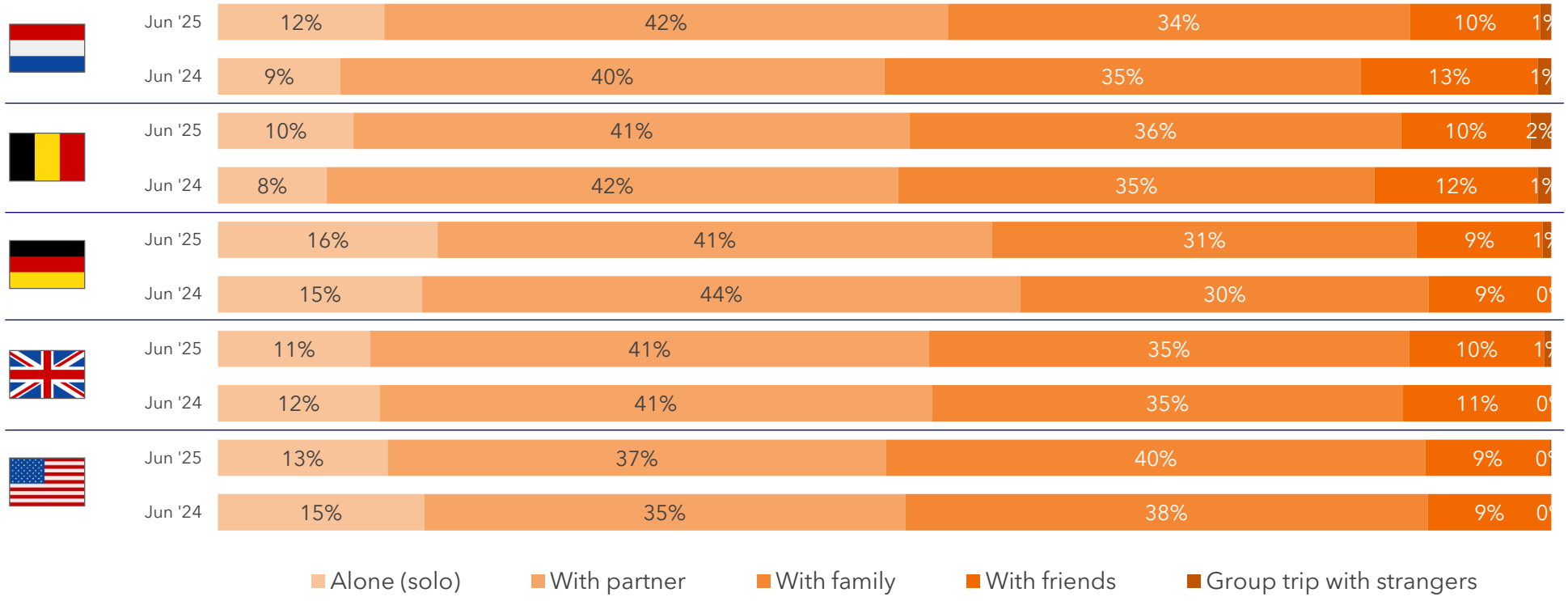


Base: People with holiday plans in a European country (booked or yet to book)
By age group, the n is around 100.

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

Means of transport for European holidays (NL)

On average, the largest group goes on holiday with their partner (41% on average), followed by a holiday with immediate family and/or other family members (35% on average). Only among Americans is the group holidaying with family larger than only with partner. Among Germans, the number of solo travellers is the highest (16%).



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

Questionnaire: Which travel company do you plan to take your next holiday with?

A hotel/guesthouse is the most popular type of accommodation (average 49%). This is followed by an apartment (average 13%) and renting accommodation from a private person (average 8%). A bungalow (park) is especially popular among Dutch people. Americans often stay in a home owned by family/friends.

Hotel/guesthouse	39% (40%)	46% (48%)	47% (52%) ↓	52% (51%)	61% (58%)
Bed and breakfast	5% (4%)	8% (6%)	4% (2%) ↑	5% (7%) ↓	2% (3%)
Apartment	14% (15%)	12% (13%)	23% (21%)	10% (9%)	2% (2%)
Bungalow (park)	13% (12%)	6% (5%)	4% (3%)	2% (1%)	0% (0%)
Campsite	11% (11%)	6% (6%)	5% (4%)	2% (3%)	3% (4%)
Group accommodation	1% (1%)	1% (1%)	0% (1%)	1% (0%)	1% (1%)
With a private person (e.g. Airbnb)	7% (7%)	8% (7%)	5% (4%)	13% (11%)	9% (13%) ↓
Boat	1% (1%)	0% (1%)	2% (2%)	3% (4%)	4% (3%)
Second home / permanent (camping) pitch	1% (1%)	2% (2%)	0% (0%)	1% (2%)	1% (0%)
Residence family/friends/acquaintances	4% (4%)	7% (7%)	6% (7%)	6% (7%)	10% (11%)
Other	2% (1%)	1% (1%)	2% (2%)	2% (2%)	2% (2%)

Base: People with holiday plans for the next 12 months (booked or yet to book).
Highlight: 3 highest scores per country. In brackets the scores from a year ago.
Arrow: significant difference compared to the measurement a year ago.

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

Type of accommodation

For the next holiday in the Netherlands (own country), Dutch people most often choose a bungalow (park), followed by a hotel and a campsite. For holidays elsewhere in Europe, the top 3 is hotel, apartment and campsite. There are no significant differences compared to a year ago.

	At home	Elsewhere in Europe
Hotel/guesthouse	24% (24%)	42% (44%)
Bed and breakfast	7% (7%)	5% (3%)
Apartment	10% (7%)	17% (19%)
Bungalow (park)	34% (35%)	6% (6%)
Campsite	15% (17%)	11% (11%)
Group accommodation	2% (1%)	1% (1%)
With a private person (e.g. Airbnb)	4% (4%)	9% (8%)
Boat	1% (0%)	1% (1%)
Second home / permanent (camping) pitch	0% (1%)	1% (1%)
Residence family/friends/relatives	1% (2%)	3% (4%)
Other	0% (1%)	2% (1%)

Base: People with holiday plans for the next 12 months (booked or yet to book).
Highlight: 3 highest scores per country.
In brackets the scores from a year ago.

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

Type of accommodation vs. destination (NL)

Beach holidays are the most frequently planned (average 26%). This is followed by holidays with friends/family (average 12%) and nature holidays (average 11%). Among Dutch people, a touring holiday scores relatively high.

Winter sports holiday	1%	0%	1%	1%	1%
Beach holiday	23%	27%	34%	27%	17%
Water sports holiday	1%	0%	1%	1%	1%
Walking holiday	5%	6%	4%	2%	2%
Cycling holiday	2%	2%	2%	0%	0%
Other type of active holiday	2%	2%	3%	2%	2%
Touring holiday	8%	5%	5%	5%	4%
Cruise	2%	1%	3%	5%	5%
Visit to event	3%	2%	2%	3%	5%
City break	10%	9%	8%	11%	7%
Cultural holidays	6%	8%	4%	4%	6%
Visits to friends/family/etc	4%	5%	7%	7%	14%
Nature holiday	12%	13%	14%	6%	9%
Wellness holidays	3%	2%	4%	4%	3%
Holidays with friends/family/etc	11%	13%	3%	17%	17%
Culinary holidays	2%	2%	2%	1%	1%
Shopping holiday	2%	1%	1%	1%	1%
Volunteering	1%	1%	0%	0%	1%
Other	4%	2%	2%	3%	3%

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

Question: How would you characterise your next holiday?

Relaxing, being with friends/family and escaping one's surroundings are the main holiday motivations.

Experiencing / learning about other cultures	17%	16%	17%	18%	17%
Relaxing / unwinding / taking a break	49%	48%	47%	56%	44%
Having unique experiences	19%	15%	18%	19%	23%
Escaping your usual surrounding	29%	26%	35%	28%	30%
Learning something new	6%	7%	10%	7%	9%
Meeting new people	5%	5%	7%	8%	6%
Shopping	9%	9%	6%	8%	8%
Spending quality time with friends or family	36%	36%	32%	41%	43%
Taking time for myself / self-reflection	16%	19%	15%	16%	16%
Improving physical and mental vitality/health	9%	12%	12%	13%	11%
Discovering a specific region/area	18%	23%	22%	17%	15%
Spending time in nature / being outdoors more	24%	23%	25%	15%	14%
Seeking adventure	11%	10%	11%	11%	13%
Doing sport / being physically active	6%	6%	6%	3%	4%
Other, namely	1%	1%	1%	1%	1%
None of the above	3%	2%	2%	2%	4%

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

Question: What are, in general, the most important reasons for you to go on holiday? You can choose up to 3 reasons.

Among Dutch solo travellers, holiday motivations are slightly different from those of the other three groups. For solo travellers, 'time for myself / self-reflection' is more important, as is experiencing unique experiences.

	Alone (solo)	With partner	With family	With friends
Experiencing / learning about other cultures	21%	15%	17%	25%
Relaxing / unwinding / taking a break	43%	53%	50%	48%
Having unique experiences	24%	20%	18%	16%
Escaping your usual surrounding	24%	30%	32%	31%
Learning something new	11%	4%	7%	5%
Meeting new people	12%	6%	3%	3%
Shopping	9%	10%	8%	5%
Spending quality time with friends or family	11%	33%	54%	37%
Taking time for myself / self-reflection	31%	16%	13%	18%
Improving physical and mental vitality/health	10%	10%	8%	6%
Discovering a specific region/area	19%	19%	15%	24%
Spending time in nature / being outdoors more	20%	29%	24%	16%
Seeking adventure	13%	11%	13%	11%
Doing sport / being physically active	7%	7%	6%	6%
Other, namely	0%	0%	1%	1%
None of the above	0%	0%	1%	0%

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

Question: what are, in general, the most important reasons for you to go on holiday? You can choose up to 3 reasons.

Holiday motivations (NL)

All respondents were asked which activities they generally like to do during their holidays. Below are the top five per country of origin. For the Dutch, British and Americans, 'eating out' is number one. For Belgians it is sightseeing and for Germans, going to the beach comes first. Sitting on a terrace is only in the top 5 for the Dutch.

1. Eating out (breakfast, lunch, dinner) (38%)	1. Visiting tourist attractions / landmarks (35%)	1. Going to the beach (41%)	1. Eating out (breakfast, lunch, dinner) (39%)	1. Eating out (breakfast, lunch, dinner) (41%)
2. Visiting tourist attractions / landmarks (33%)	2. Eating out (breakfast, lunch, dinner) (34%)	2. Visiting tourist attractions / landmarks (35%)	2. Going to the beach (33%)	2. Going to the beach (30%)
3. Walking/hiking in nature (28%)	3. Visiting a local market (30%)	3. Eating out (breakfast, lunch, dinner) (30%)	3. Visiting tourist attractions / landmarks (32%)	3. Visiting tourist attractions / landmarks (29%)
4. Going to the beach (27%)	4. Walking/hiking in nature (30%)	4. Walking / hiking in nature (29%)	4. Experiencing local culture and traditions (26%)	4. Experiencing local culture and traditions (25%)
5. Sitting on the terrace (26%)	5. Going to the beach (27%)	5. Swimming (24%)	5. Relaxing by the pool (24%)	5. Shopping (22%)

Base: everyone (entire sample).
Highlight: frequently mentioned categories.

Which of the following activities do you, in general, like to undertake during your holidays? You can choose up to 5 activities.

Favourite activities on holiday

The most frequently used sources of information when choosing the next holiday destination are websites of travel providers/ online travel agencies/tour operators (average 51%), a search engine (average 35%) and friends/family/colleagues (average 32%). Websites with reviews from other travellers are also used relatively widely by Brits.

AI / ChatGPT	5%	6%	9%	8%	9%
Websites with reviews from other travellers	20%	16%	20%	32%	24%
Social media (e.g. Facebook, Instagram)	14%	12%	16%	19%	25%
Search engine (e.g. Google, Bing)	36%	29%	35%	38%	37%
Websites of travel providers /online travel agencies / tour operators	53%	51%	56%	57%	37%
Travel tips and articles in magazines or newspapers	9%	8%	10%	13%	13%
Friends, family or colleagues	26%	28%	32%	32%	40%
Travel blogs and websites	8%	8%	6%	13%	12%
Travel books and guides	13%	12%	9%	16%	13%
Travel programmes on TV	8%	6%	13%	14%	10%
Discount/auction website	8%	7%	8%	5%	6%
In-person travel agency or tour operator	8%	15%	14%	13%	8%
Social travel website (e.g. Airbnb)	12%	8%	14%	14%	15%
I do not consult sources	5%	7%	5%	6%	9%
From experience / already known	11%	10%	14%	10%	13%
Other, namely	2%	1%	1%	1%	1%

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

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

Senior Dutch people choose their next holiday destination based on previous experience more often than younger Dutch people do. Among the younger groups, it is noticeable that they use AI / ChatGPT more often as a source of information, as well as social media or social travel websites such as Airbnb.

	18-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65+ years
AI / ChatGPT	13%	11%	6%	3%	3%	0%
Websites with reviews from other travellers	24%	29%	24%	21%	15%	11%
Social media (e.g. Facebook, Instagram)	25%	24%	19%	9%	10%	1%
Search engine (e.g. Google, Bing)	31%	39%	46%	38%	41%	19%
Websites of travel providers / online travel agencies / tour operators	36%	60%	56%	58%	58%	45%
Travel tips and articles in magazines or newspapers	11%	10%	7%	11%	10%	8%
Friends, family or colleagues	31%	37%	32%	23%	22%	16%
Travel blogs and websites	12%	10%	11%	10%	6%	2%
Travel books and guides	11%	14%	13%	14%	14%	11%
Travel programmes on TV	9%	6%	11%	8%	8%	5%
Discount/auction website	14%	13%	12%	4%	5%	5%
Physical travel agency or tour operator	12%	10%	5%	7%	7%	11%
Social travel website (e.g. Airbnb)	25%	23%	16%	9%	5%	1%
I do not consult sources	2%	2%	2%	4%	9%	9%
From experience / already known	1%	5%	7%	15%	11%	20%
Other, namely	0%	0%	0%	3%	3%	3%

Base: everyone (entire sample)
Highlight: 3 highest scores per group.

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

Sources of information (NL)

On average, flexible cancellation conditions are most important when choosing a holiday destination (on average 72% find this (very) important). This is followed by 'staying in a quiet place' (66% on average) and, by a wide margin, 'destination close to home' (32% on average). However, a destination close to home is considered more important than a year ago.

Flexible cancellation conditions	64% (66%)	75% (72%)	77% (77%)	68% (67%)	75% (74%)
Destination close to home	29% (24%) ↑	34% (32%)	40% (39%)	26% (22%) ↑	32% (27%) ↑
Staying in quiet place	69% (68%)	77% (77%)	71% (69%)	54% (53%)	55% (64%) ↓

Base: People with holiday plans for the next 12 months (booked or yet to book).
Percentage: top 2 (very important + important).
In brackets are scores from a year ago. Arrow: significant difference.

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

People expect to spend their longest holiday of 2025 mainly in August (average 22%), September (average 21%) and July (average 20%).

January	1% (1%)	0% (1%)	0% (1%)	1% (1%)	2% (2%)
February	1% (1%)	1% (1%)	1% (1%)	2% (1%)	2% (1%)
March	1% (1%)	1% (1%)	2% (1%)	1% (1%)	2% (3%)
April	2% (1%)	1% (2%)	2% (1%)	2% (2%)	2% (2%)
May	2% (2%)	4% (1%)	3% (3%)	3% (3%)	2% (3%)
June	8% (10%)	7% (9%)	9% (7%)	7% (12%)	12% (11%)
July	22% (23%)	27% (28%)	16% (19%)	16% (16%)	18% (21%)
August	24% (26%)	21% (22%)	25% (25%)	22% (20%)	20% (19%)
September	21% (20%)	22% (23%)	24% (24%)	22% (21%)	14% (12%)
October	7% (7%)	6% (6%)	6% (7%)	7% (9%)	9% (10%)
November	4% (2%)	3% (2%)	4% (3%)	5% (4%)	6% (5%)
December	3% (3%)	3% (2%)	4% (3%)	7% (5%)	6% (7%)
I do not know yet	4% (3%)	4% (3%)	4% (4%)	6% (4%)	6% (4%)
Total	**100%**	**100%**	**100%**	**100%**	**100%**

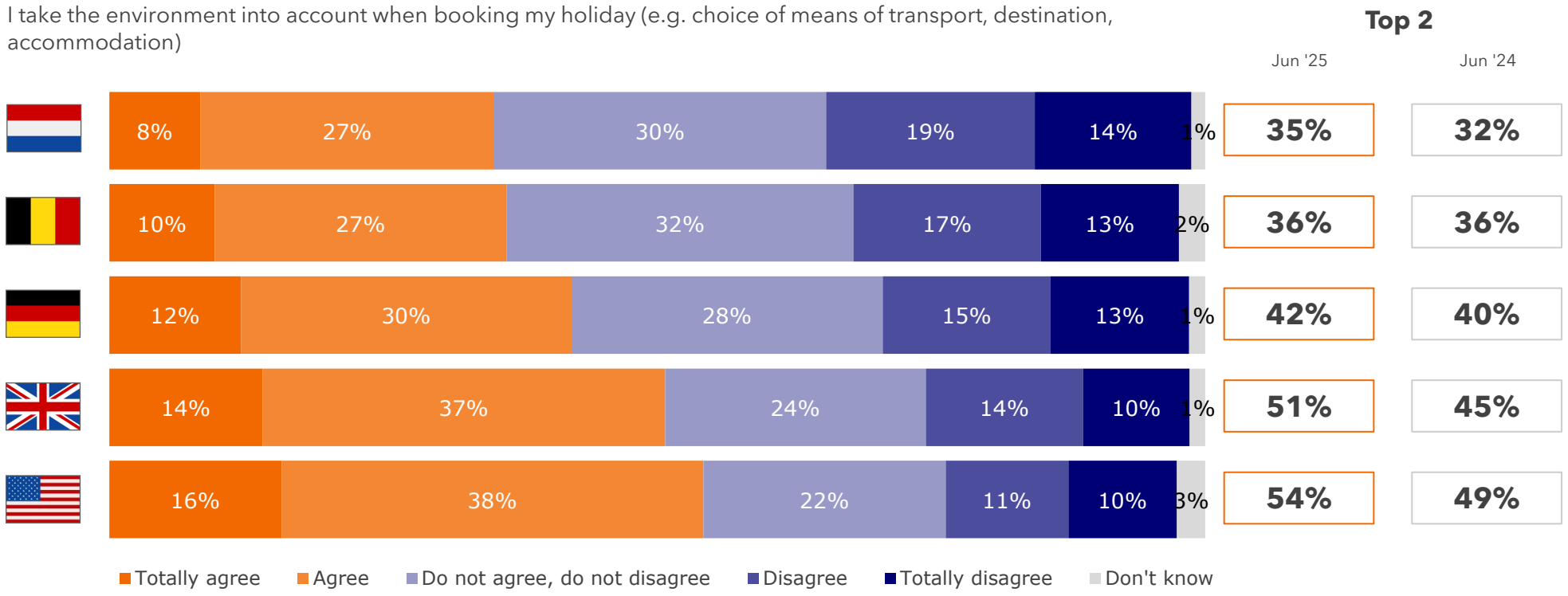
Base: People with a holiday intention for the next 12 months (booked or have yet to book)
Highlight: highest percentage per country
In brackets: score from a year ago.

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

Departure month for longest holiday 2025

Of all respondents, an average of 44% (completely) agreed with the statement 'I take the environment into account when booking my holiday'. A year ago, this was 40% on average. Of the countries listed below, the Dutch and Belgians agree with the statement the least.

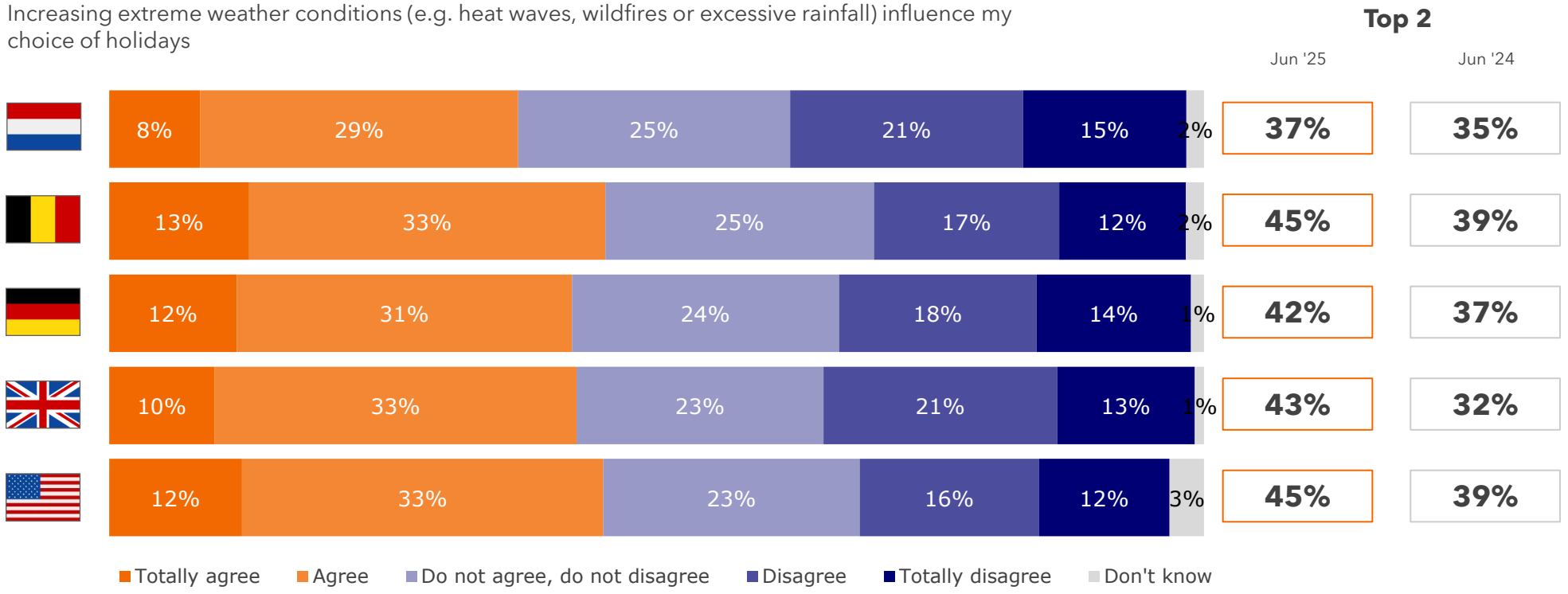
I take the environment into account when booking my holiday (e.g. choice of means of transport, destination, accommodation)



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

On average, 43% of those surveyed (fully) agree with the statement that increasing extreme weather conditions influence holiday choices. A year ago, this was 37%. Probability of extreme weather thus currently plays a bigger role in holiday choice. Dutch people least agree with the statement (37%) and Belgians and Americans most (both 45%).

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



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

Of those indicating that (chance of) extreme weather affects their choice of holiday, most adjust their holiday period (average 49%). This is followed by adjusting the destination (average 42%). Adjusting the holiday period is now most often mentioned by Dutch people, whereas a year ago, adjusting the destination was mentioned most often. Brits and Americans pay relatively high attention to conditions and insurance.

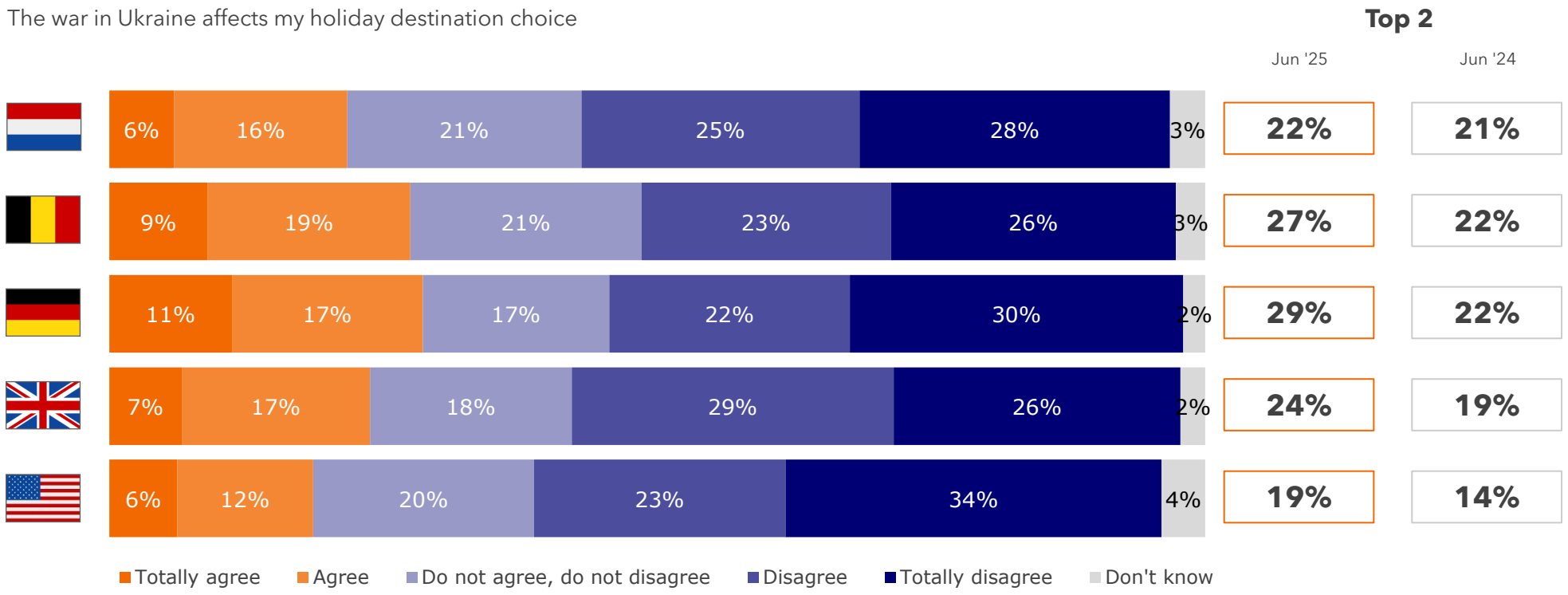
I adjust my destination	46% (47%)	40% (35%)	56% (50%)	34% (24%)	38% (27%)
I adjust my holiday period	51% (46%)	53% (50%)	53% (47%)	47% (42%)	42% (43%)
I book more last-minute	21% (17%)	21% (20%)	23% (21%)	19% (23%)	22% (22%)
I pay extra attention to conditions and insurance	16% (21%)	20% (21%)	23% (24%)	34% (36%)	34% (41%)
Other, namely	2% (3%)	2% (3%)	1% (1%)	1% (2%)	3% (2%)

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

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

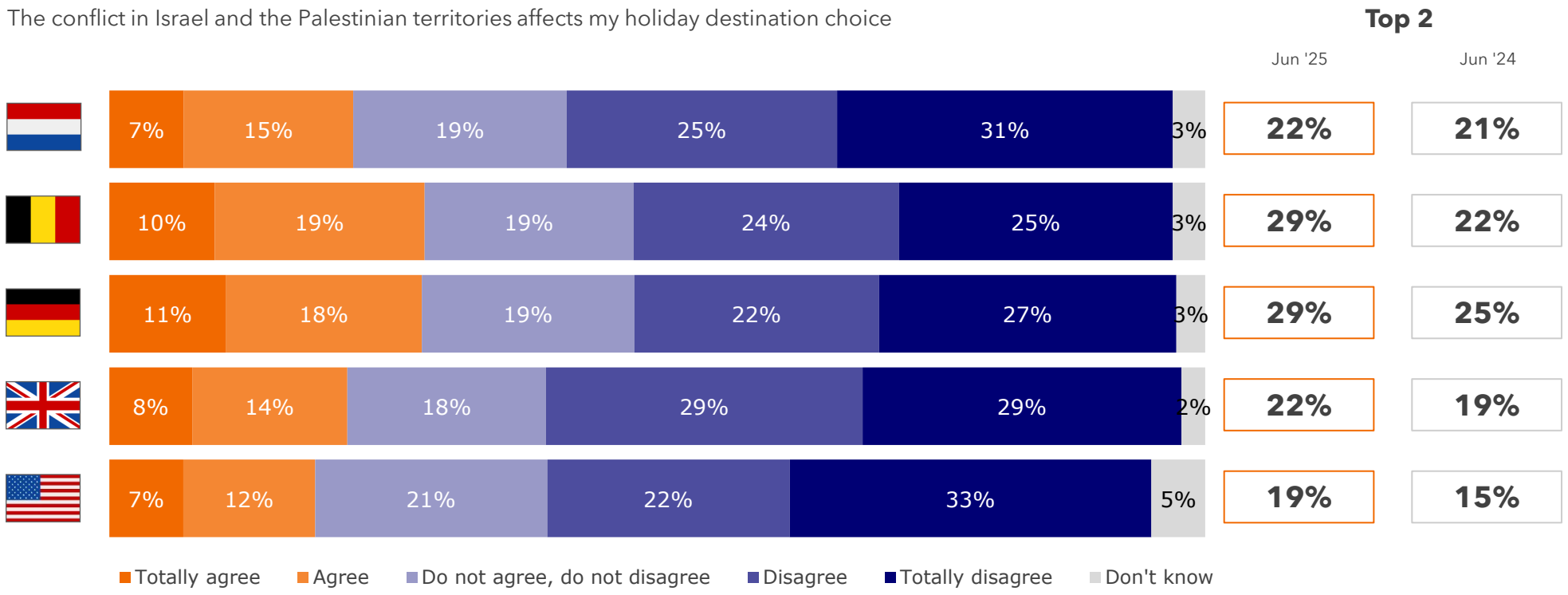
Extreme weather (2/2)

About a quarter (24%) of those surveyed say the war in Ukraine affects their choice of holiday destination. A year ago, this was 20% on average. Among Americans, this score is currently lowest (19%) and highest among Germans (29%).



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

Around a quarter (24%) of those surveyed also say that the conflict in Israel and the Palestinian territories affects their choice of holiday destination. A year ago, this was 20%. The top2 scores currently range from 19% among Americans to 29% among Germans and Belgians.

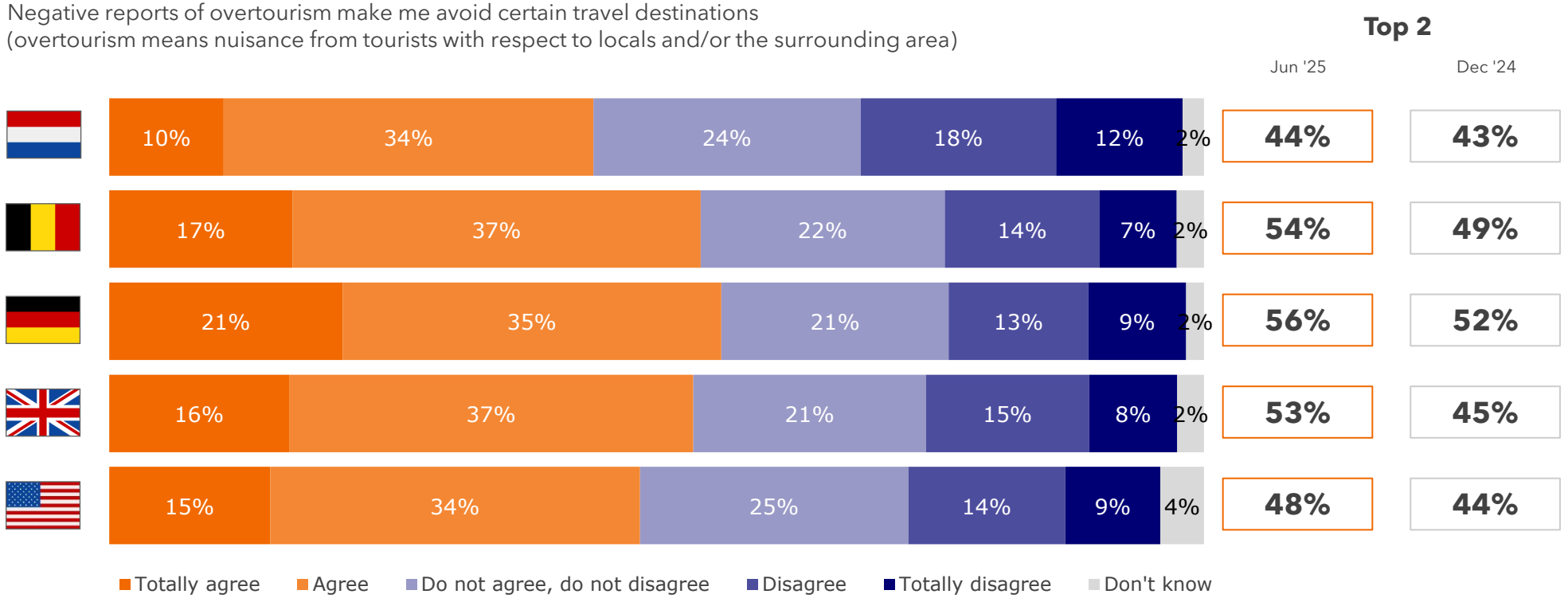


Base: everyone (entire sample)
Rounding differences may occur for the top 2%.

Israel and Palestinian territories

On average, 51% say they avoid certain holiday destinations due to negative reports of overtourism. This score is lowest among Dutch people (44%) and highest among Germans (56%). Six months ago, the average for these five countries was 46%.

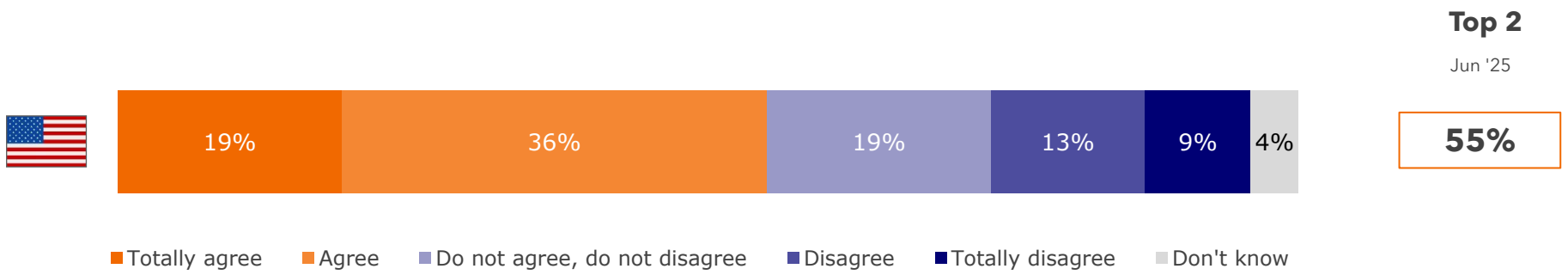
Negative reports of overtourism make me avoid certain travel destinations
(overtourism means nuisance from tourists with respect to locals and/or the surrounding area)



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

More than half of Americans (average 55%) worry that political tensions may affect how they are perceived abroad when travelling internationally.

I am concerned that political tensions might affect how Americans are perceived abroad when travelling internationally.



Top 2

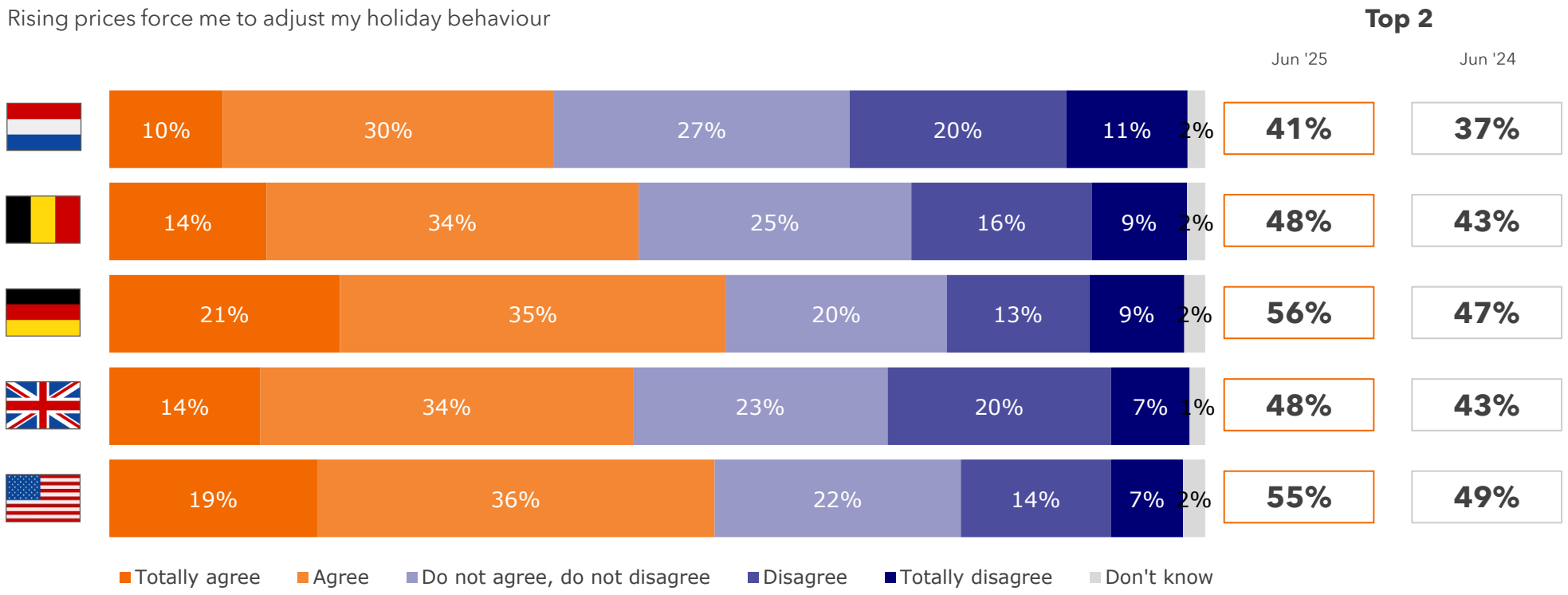
Jun '25

55%

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

2. Influence of rising prices on holiday plans

Half of those surveyed (on average 50%) said they were forced to adjust their holiday behaviour as a result of rising prices. A year ago, this was 44% on average. However, last year's research gave the example of 'fuel, gas/energy, groceries etc', whereas this year, this description was omitted. Scores range from 41% (Dutch) to 55% (Americans) and 56% (Germans).



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

If people adjust their holiday behaviour (due to higher prices), they do so mainly by going on holiday less often (average 48%) and/or choosing cheaper accommodation (average 44%). This is followed by shortening their holidays (average 32%). Dutch and Belgians choose avoiding the high season less often (as a saving measure) compared to a year ago.

Shorter holidays	28% (27%)	29% (31%)	34% (31%)	27% (35%) ↓	40% (37%)
Going on holiday less often	41% (44%)	48% (42%) ↑	51% (53%)	50% (51%)	50% (51%)
Cheaper accommodation	43% (43%)	39% (40%)	47% (41%) ↑	47% (42%)	44% (41%)
Cheaper transport	17% (19%)	14% (14%)	16% (11%) ↑	17% (19%)	22% (24%)
Save on costs in the destination itself	30% (35%)	22% (23%)	26% (30%)	32% (30%)	28% (32%)
Avoiding the high season	18% (23%) ↓	21% (27%) ↓	20% (24%)	27% (30%)	25% (23%)
Other, namely	3% (3%)	2% (3%)	2% (2%)	1% (1%)	2% (2%)

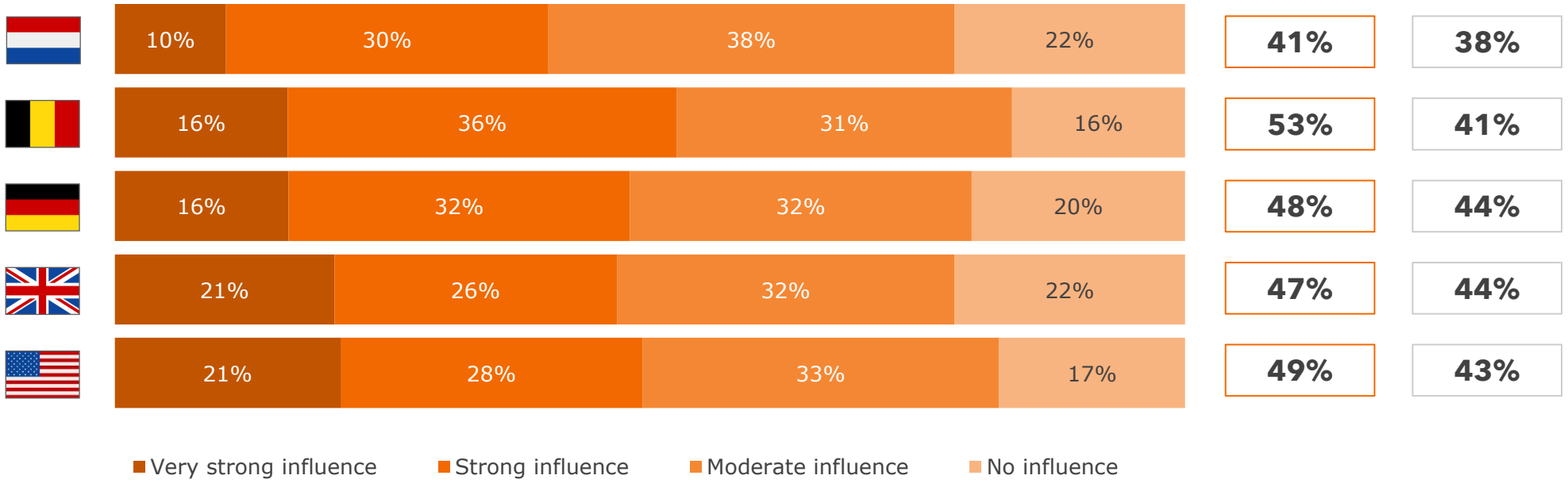
Base: People who (totally) agree with the statement 'Because of rising prices, I am forced to adjust my holiday behaviour'.
Highlight: the highest score of each country.
In brackets the scores from a year ago. Arrow: significantly higher/lower.

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

Adapting holiday behaviour because of rising prices

Of those who have holiday intentions but have not yet booked, an average of 47% say that rising/high prices have a (very) big influence on this. The top2 scores currently range from 41% among Dutch people to 53% among Belgians.

To what extent do rising/high prices have to do with the fact that you have not yet pre-booked a holiday for the next 12 months?*



*Note: In June '24, this question mentioned examples (of higher prices) such as fuel, gas/energy, groceries, this was omitted in June '25.

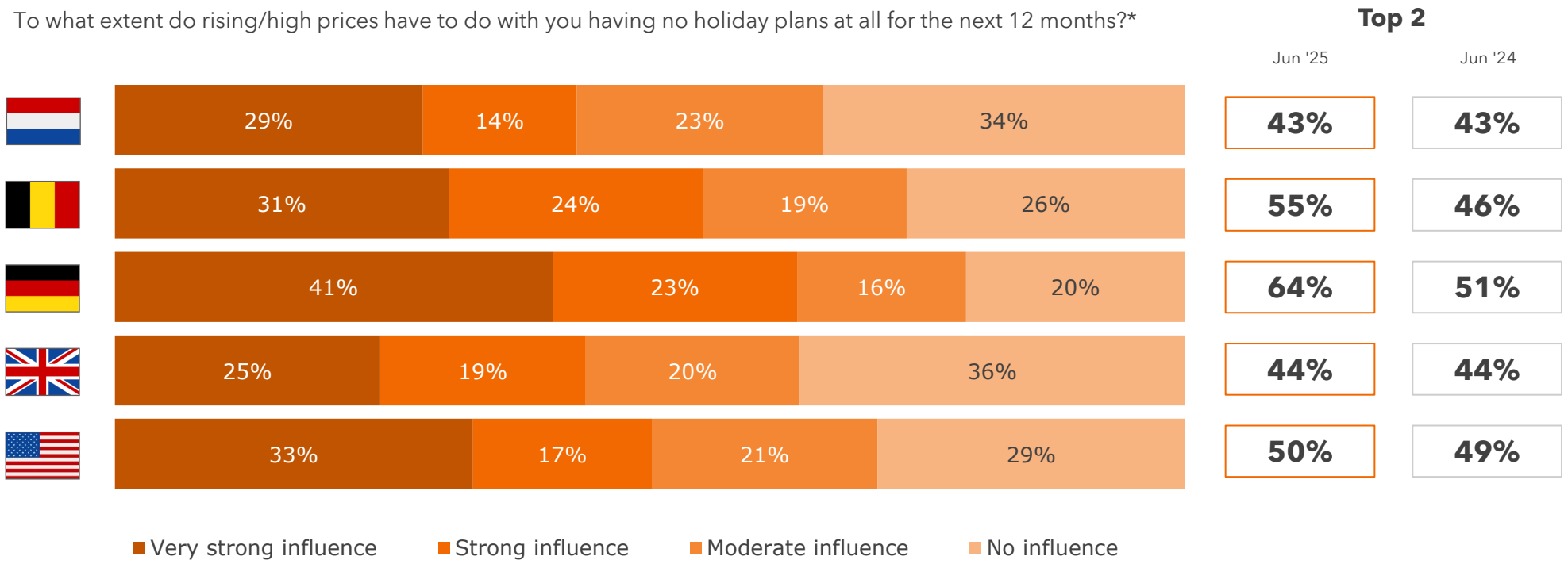
Base: People who have not yet booked but have holiday intentions for the next 12 months.
Rounding differences may occur at the top 2%.

Questionnaire: To what extent are the rising/high prices related to the fact that you have not yet pre-booked a holiday for the next 12 months?

Influence of rising prices if not yet booked

On average, 52% of people without holiday plans say that rising/high prices play a (very) big influence on this. Among Dutch people, this score is lowest (43%) and highest among Germans (64%). A year ago, the average among these five countries was 47%*.

To what extent do rising/high prices have to do with you having no holiday plans at all for the next 12 months?*



*Note: In June '24, this question mentioned examples (of higher prices) such as fuel, gas/energy, groceries, this was omitted in June '25.

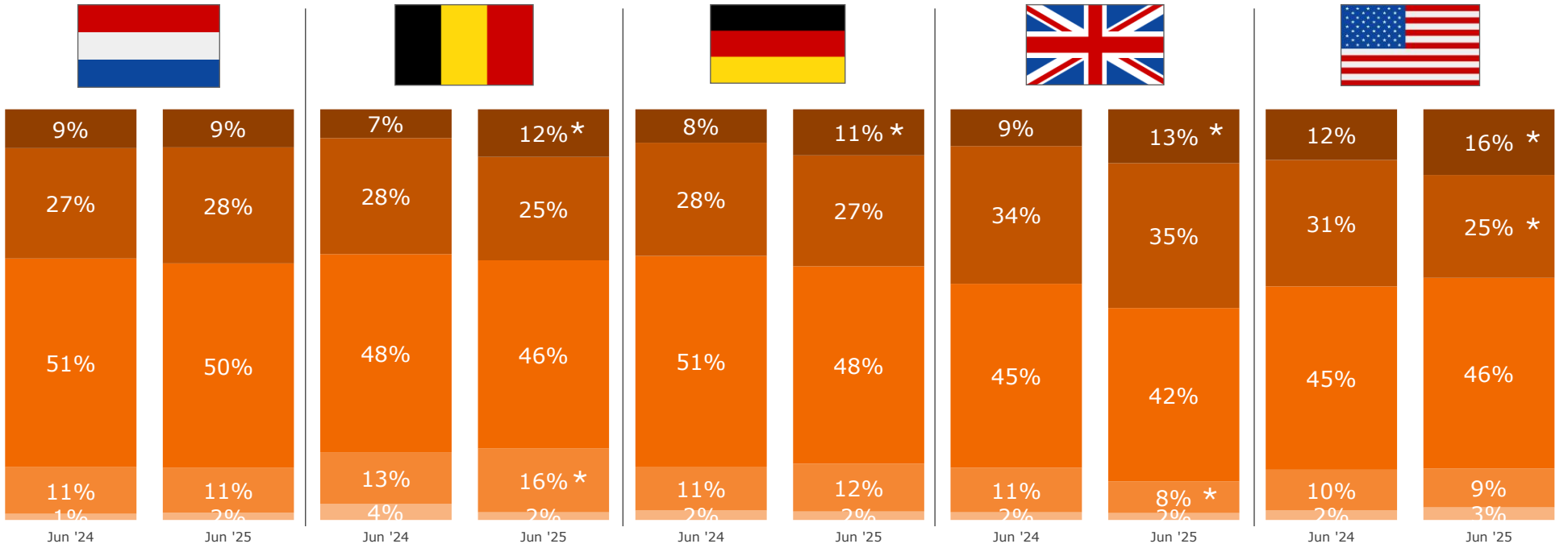
Base: People who currently have no holiday intention for the next 12 months.
Rounding differences may occur at the top 2%.

Questionnaire: To what extent do rising/high prices relate to you having no holiday plans at all for the next 12 months?

Influence of rising prices if no holiday plans

Of those with a holiday intention for the next 12 months, on average 46% say they have a similar holiday budget for their next holiday as in previous years. On average 28% have a slightly higher budget than in previous years. Especially in the UK, people now have a (slightly or much) higher budget than what they indicated a year ago.

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



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

Q: Which situation applies most to you?

Appendix

About the Holiday Sentiment Monitor

The Holiday Sentiment Monitor (HSM) from the Netherlands Board of Tourism & Conventions (NBTC) provides insights twice a year into the holiday intentions of Dutch residents and those from key international markets: Belgium, Germany, the United Kingdom, and the United States.

The monitor examines how current events – such as economic conditions, climate-related factors, and geopolitical developments – influence holiday behaviour. The HSM supports policymakers and the tourism sector in responding to changing visitor and (inter)national market developments.

Element	Description
Method:	Online
Target group:	0 + 1 measurement: NL/BE/DE/FR/UK/USA/CHINA 2-measurement: NL/BE/DE/UK 3-Measurement: NL/BE/DE/FR/UK/USA/CHINA 4-Measurement: NL/BE/DE/UK 5-measurement to 11-measurement: NL/BE/DE/FR/UK/USA/CHINA 12-measurement to 15-measurement: NL/BE/DE/FR/UK/USA 16-measurement: NL/BE/DE/FR/UK/USA (+CHINA APART) 17-measurement: NL/BE/DE/FR/UK/USA 18-measurement: NL/BE/DE/FR/UK/USA 19-measurement: NL/BE/DE/FR/UK/USA/CHINA* 20-measurement: NL/BE/DE/FR/UK/USA 21-measurement: NL/BE/DE/FR/UK/USA 22-measurement: NL/BE/DE/FR/UK/USA/ES 23-measurement: NL/BE/DE/UK/USA
Sample source:	Consumer panel of Dynata (except the 16-measurement in China, which was via WeChat).
Sample size:	Net n=1,000 per 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-meting to 4-metng: in 2020 5-measurement: 7 Jan to 13 Jan 2021 6-measurement: 18 Mar to 23 Mar 2021 7-measurement: 19 May to 25 May 2021 8-measurement: 1 Jul to 6 Jul 2021 9-measurement: 1 Sep - 7 Sep 2021 10-measurement: 15 Nov - 21 Nov 2021 11-measurement: 31 Mar - 6 Apr 2022 12-measurement: 13 Jun - 21 Jun 2022 13-measurement: 2 Sep - 8 Sep 2022 14-measurement: 5 Dec to 9 Dec 2022 15-measurement: 9 Mar to 14 Mar 2023 16-measurement: 1 Jun to 7 Jun 2023 17-measurement: 25 Aug to 31 Aug 2023 18-measurement: 1 Dec to 8 Dec 2023 19-measurement: 2 Apr to 8 Apr 2024 20-measurement: 30 May to 5 Jun 2024 21-measurement: 30 Aug to 6 Sep 2024 22-measurement: 29 Nov to 5 Dec 2024 23-measurement: 2 June to 6 June 2025

Colophon & contact

July 2025

Cover photo and photos on pages 50 and 51

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