

**Customer Insights
Aviation Marketing, Cargo en Customer Experience**

Corona Sentiment Monitor Holiday Plans

Second measurement

July 2020



NBTC
Holland Marketing



Research design

- In collaboration with NBTC Holland Marketing, Schiphol (Customer Insights and Aviation Marketing, Cargo and Customer Experience) carried out an international survey to monitor a.o. the travel- and holiday intention and sentiment in times of corona.
- The monitor will be repeated several times in the coming months to see potential trends and monitor development, as attitudes and behavior will change depending on corona developments in the Netherlands and abroad.

Specifications of the research

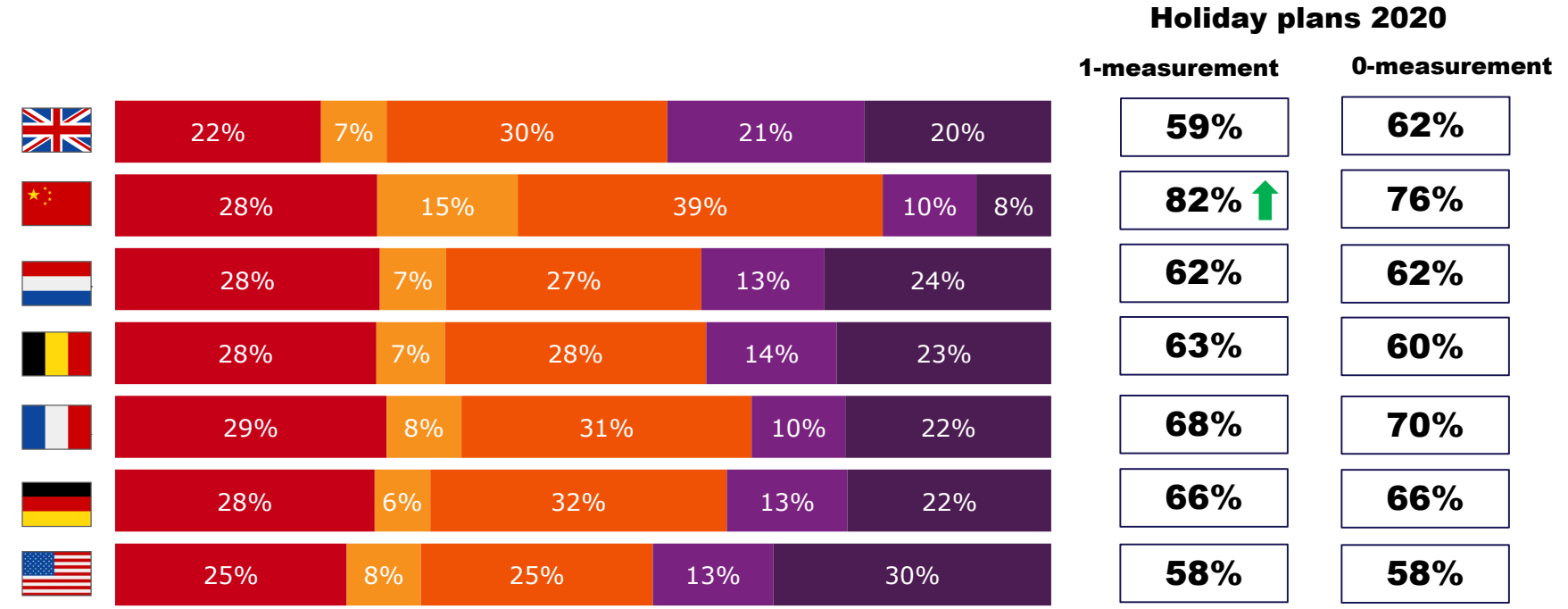
- **Goal:** Insights in international holiday plans and influence of corona virus on travel behavior
- **Method:** Online research
- **Target group:** NL / BE / DE / FR / UK / USA / China; 18+ nationally representative
- **Sample source:** The sample is taken from the Dynata consumer panel
- **Sample size:** Net n=1,000 per country (18+ nationally representative of age, gender and region)
- **Fieldwork period:** 0-measurement: May 21 to June 1, 2020
1-measurement: June 17 to June 26, 2020

More information

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Holiday intention 2020 (1/2)

Overall, the total intention to go on holiday has remained almost the same in all countries, except China. It is clear that China has entered a different phase: eight out of ten people have holiday plans, whereas this is two-thirds or less for other countries. Of the European countries in this study, the intention remains the highest in France.



■ Yes, already booked
 ■ Yes, voucher
 ■ Yes, still have to book
 ■ No, next year
 ■ No, no plans at all

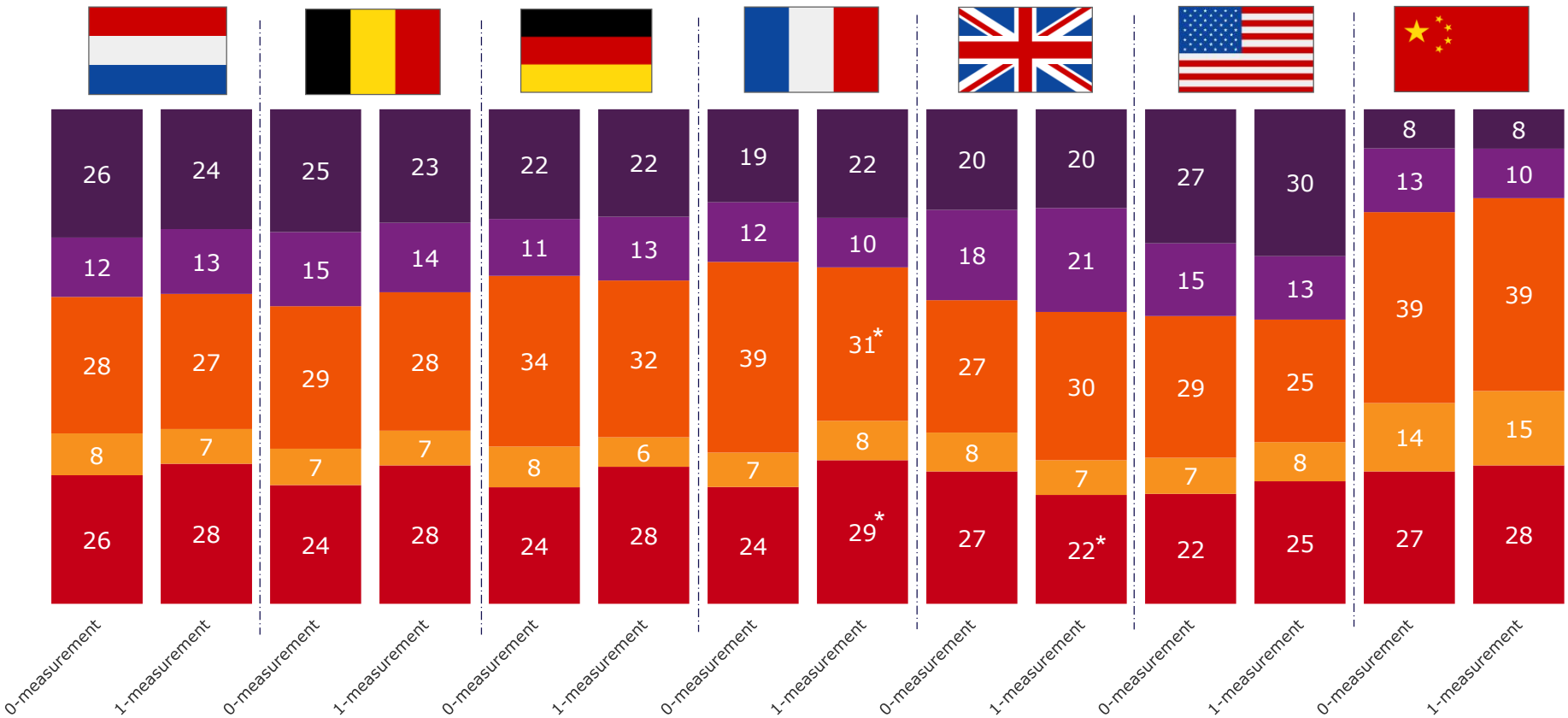
Base:
Total sample

Question:
Do you currently intend to go on holiday somewhere this year (in 2020)?

↑ Significant increase

Holiday intention 2020 (2/2)

Overall, the total intention to go on holiday has remained almost the same in all countries. Looking at the specific categories, we see significant changes, particularly in France and England. In France the number of people who have already booked their holiday has increased, whereas in England the number of bookings has decreased. In England, the group that has already booked is shrinking faster than the group that has yet to book is growing.



■ Yes, already booked
 ■ Yes, voucher
 ■ Yes, still have to book
 ■ No, next year
 ■ No, no plans at all

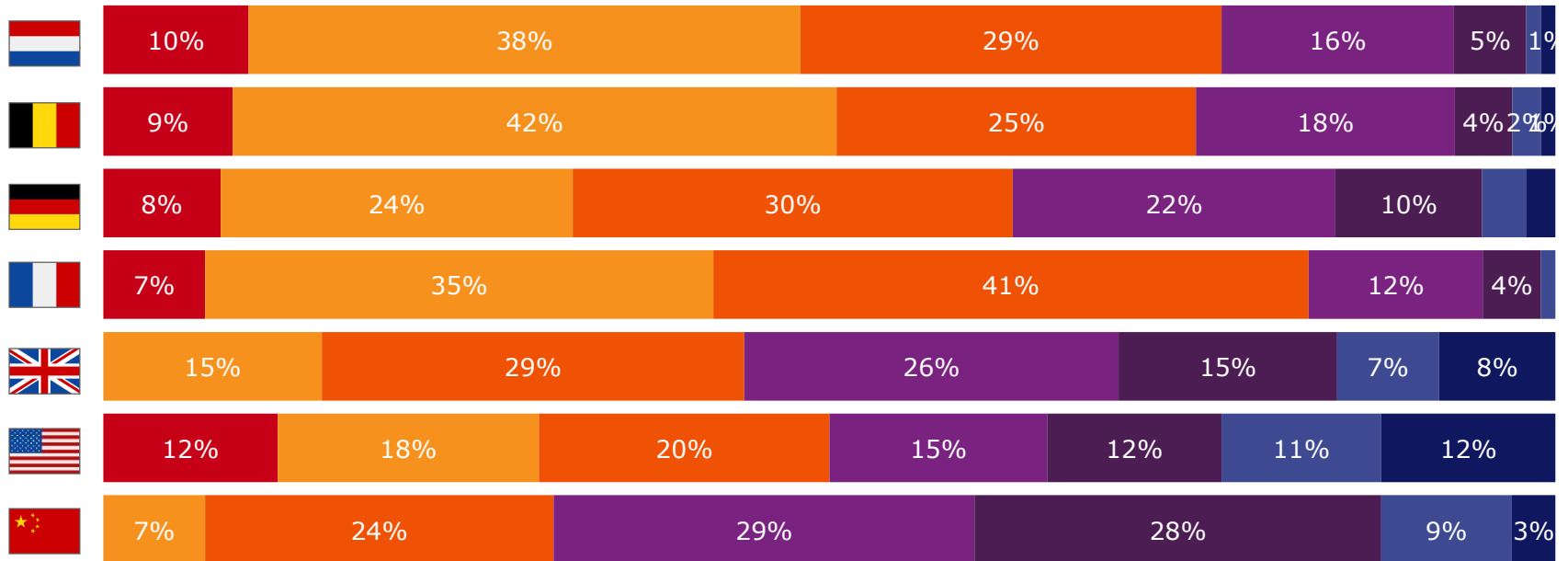
Base:
Total sample

*: significant difference

Question: Do you currently intend to go on holiday somewhere this year (in 2020)?

Departure month if booked

Holidays that have already been booked are primarily in the months of July and August. In France, the number of travellers in August is significantly higher than those in other countries. In Germany and Great Britain a considerable portion of the holidays are scheduled for September.



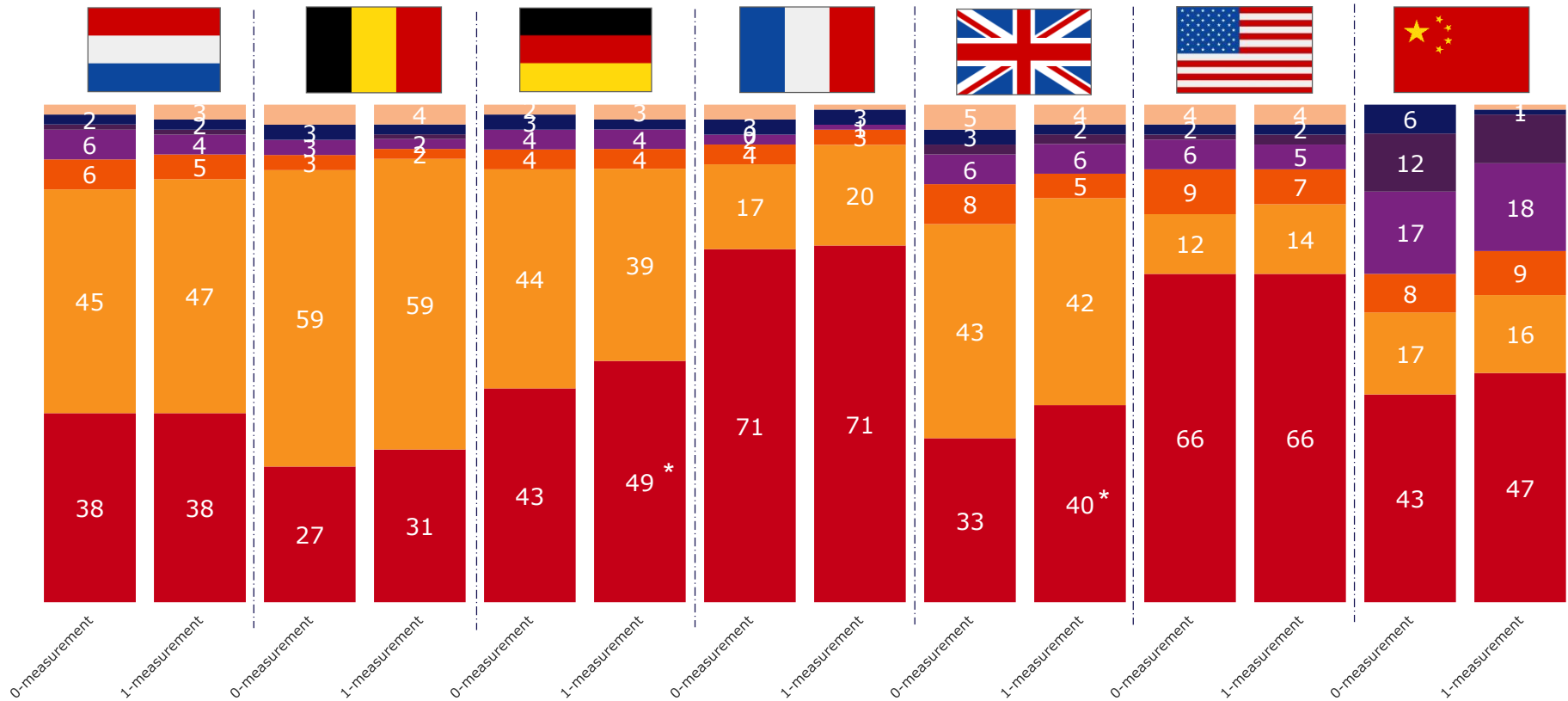
■ June
 ■ July
 ■ August
 ■ September
 ■ October
 ■ November
 ■ December

Basis:
People who have already booked a holiday in 2020

Question:
In what month are you leaving for this holiday?

Region/Continent

Compared to the first measurement, the number of people with holiday plans in their own country has increased significantly in Germany and Great Britain. France still has the largest proportion of people with holiday plans in their own country. The number of Dutch people going on holiday in their own country remains the same.



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

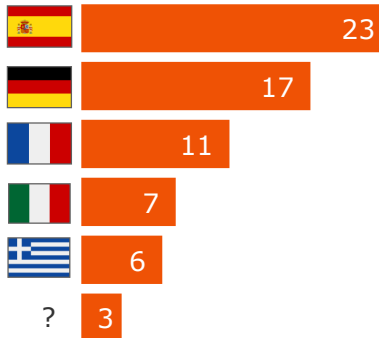
Basis:
People with holiday plans (booked/voucher/ still have to book)

*: **significant increase**

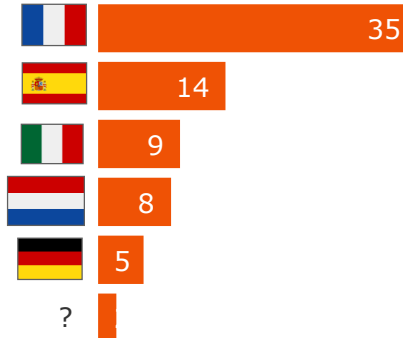
Question:
Where do you plan to spend the majority of your holiday?

European destination – Top 5: The Netherlands is becoming more popular!

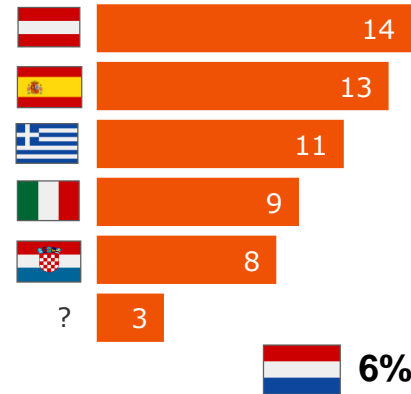
NL



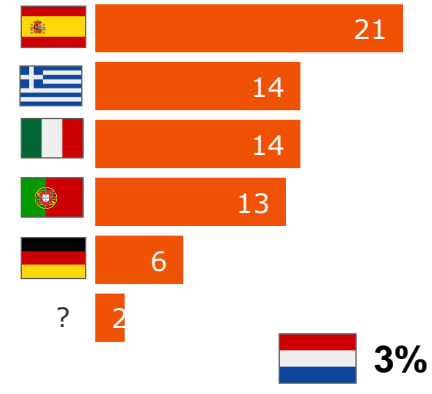
BE



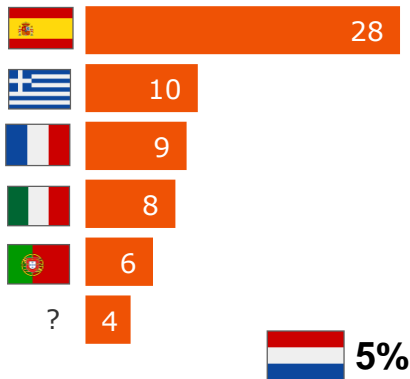
DE



FR



GB

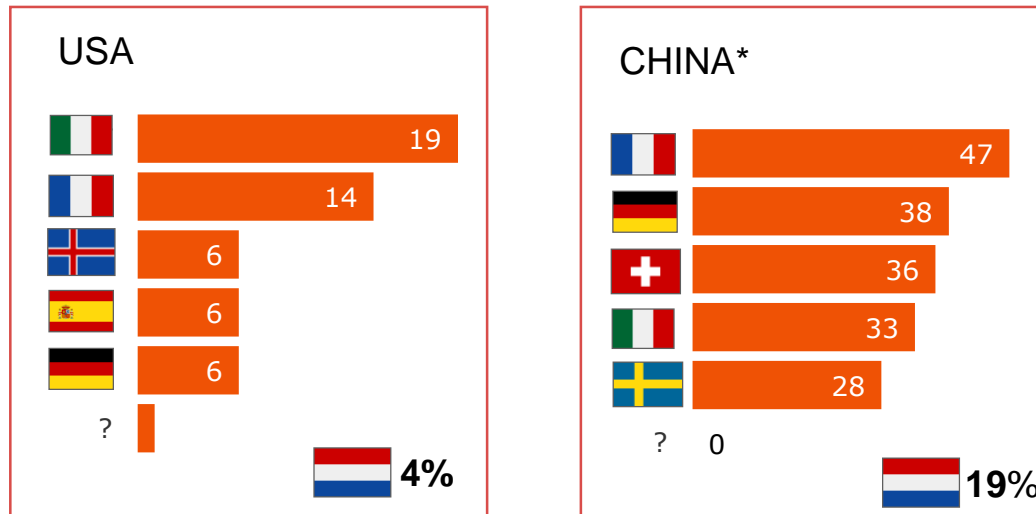


- Spain remains by far the most popular holiday destination, even during these unusual times. This applies not only to Dutch people with holiday plans but also to people with holiday plans from all European countries included in this study.
- Other Mediterranean countries such as Greece, Portugal, and Italy also remain popular, although significantly less so than Spain.
- With regard to the first measurement, the Netherlands has clearly become more popular. More people from all countries indicated that they will visit the Netherlands this year for a holiday. This applies to our neighbouring countries in particular.

Basis:
Respondents with holiday plans in a European country.

Question:
Where in Europe do you plan to spend the majority of your holiday?

European destination – Top 5 (2/2)



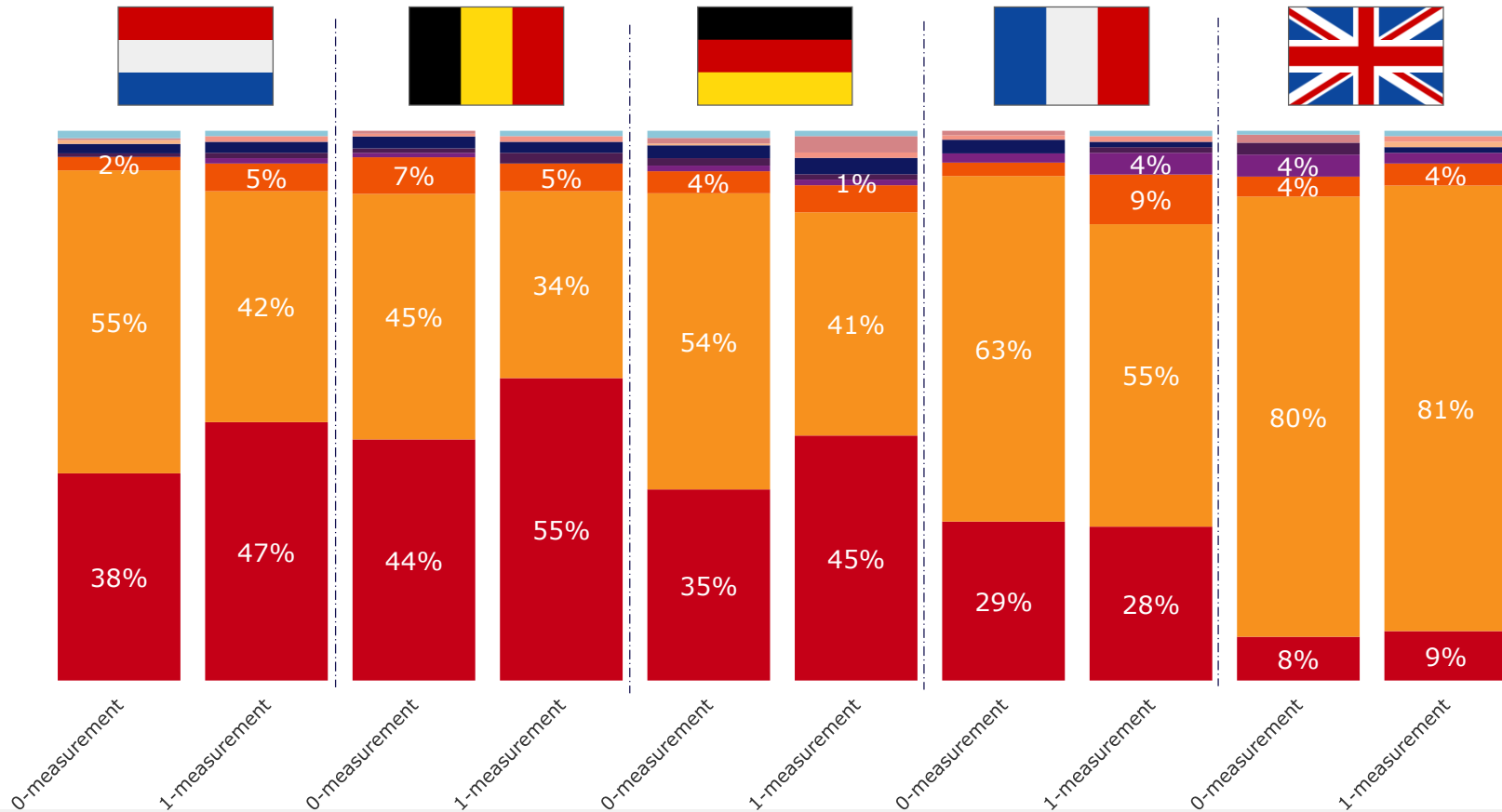
- Two out of five people with holiday plans in Europe who are living in the USA, chose Italy as their main destination. The Netherlands has also become more popular among Americans but continues to hold a small market share when it comes to the main destination for a stay in Europe.
- Chinese travellers who come to Europe often stay in several countries. Almost half of the Chinese travellers with holiday plans in Europe will visit France. Nearly one in five will also visit the Netherlands.

Basis:
Respondents with holiday plans in a European country.

Question:
Where in Europe do you plan to spend the majority of your holiday?
* Chinese respondents were able to indicate multiple countries.

Means of transport for European holiday plans

Road-trip holidays have become much more popular among Dutch, Belgian, and German travellers. Although air traffic is picking up again, travelling by plane may still cause some fear in people from these countries.

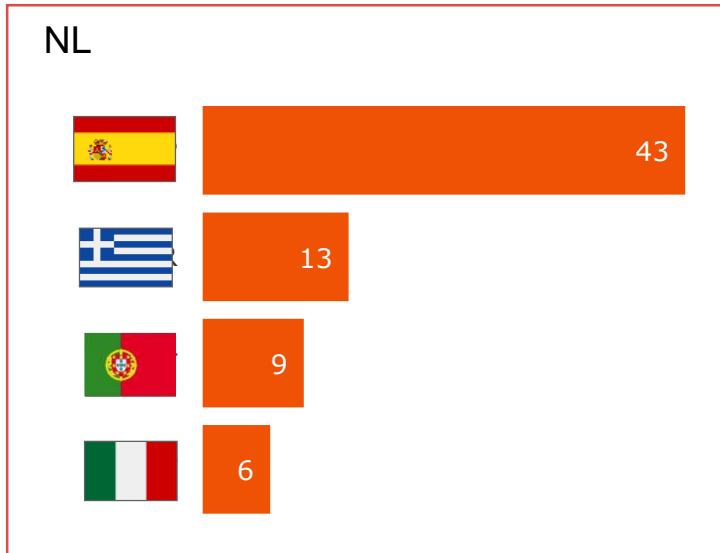


■ Car
 ■ Plane
 ■ Train
 ■ Boat
 ■ Campervan
 ■ Coach
 ■ Bicycle/moped
 ■ Motorbike
 ■ Different
 ■ Don't know yet

Base: Respondents with holiday plans in a European country.

Question: What means of transport are you planning to take to your holiday destination in Europe?

European top destinations for Dutch people travelling by plane



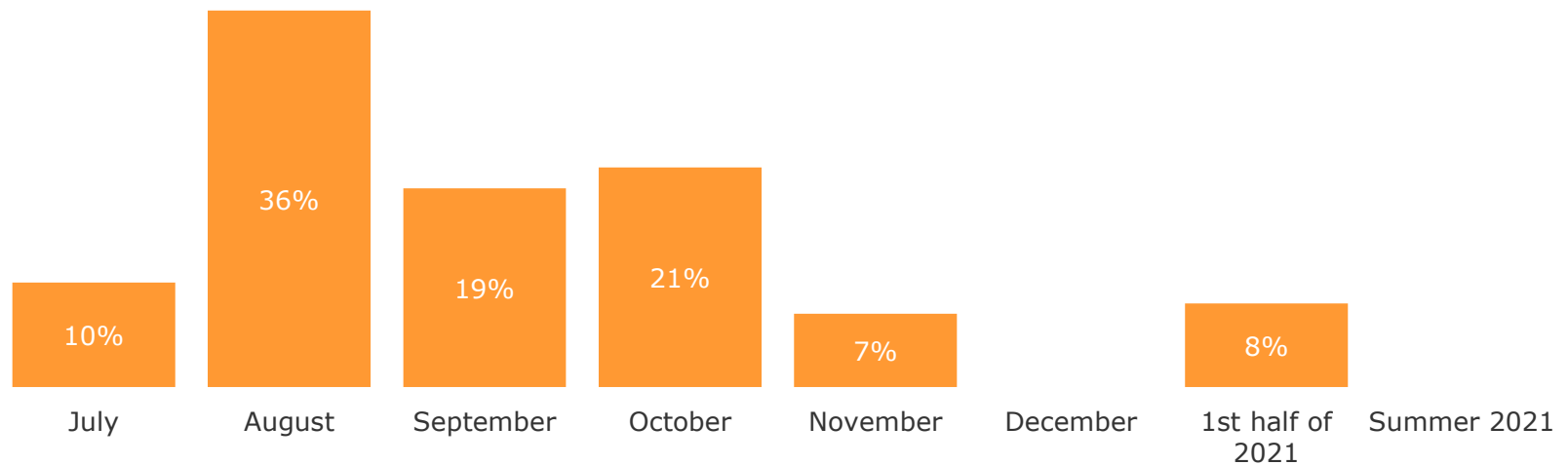
- Even in these unusual times, Spain remains by far the most popular holiday destination for Dutch people travelling by plane. Its share has also increased, from 32% to 43%.
- Greece is also fairly popular, although significantly less so than Spain.
- Remarkably, Portugal has risen to third place.
- France used to be in a higher place. Perhaps travelling by car is preferred?

Basis:
Dutch people with holiday plans who choose plane as their means of transport.

Question:
Where in Europe do you plan to spend the majority of your holiday?

When do the Dutch want to go on a holiday in Europe by plane?

- 46% of all Dutch travellers with the intention of going on a European holiday by plane still want to go on vacation during this summer (June, July, and August) (was 42%). There seems to be a shift towards a later date: in the summer holidays from July to August. After the summer holidays, this shift tends more towards October. In terms of the date of the holiday, at least for the shorter term, people seem to err on the side of caution.
- However, the holidays by plane are being postponed to the summer of next year less than last measurement.
- Of all Dutch people who intend to fly to their European holiday destination, a third have a voucher for that holiday due to a previously cancelled flight.

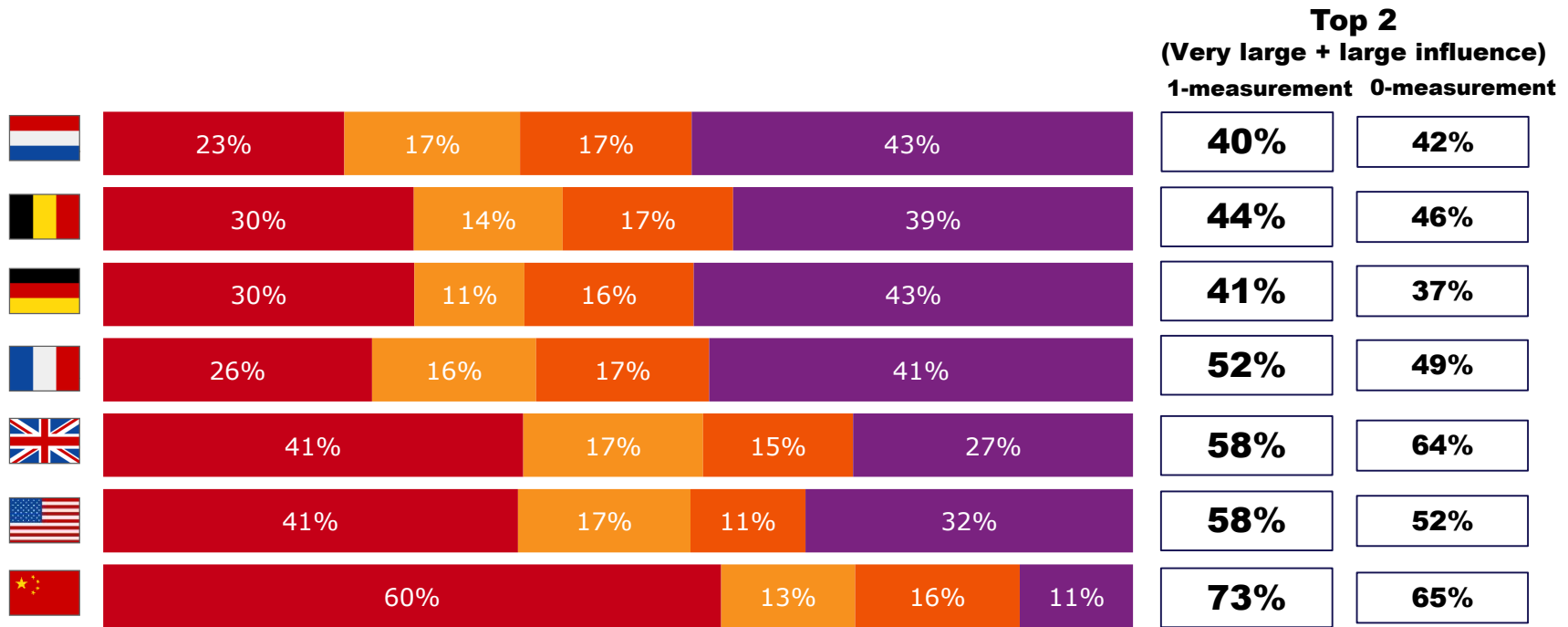


Basis:
Dutch people with holiday plans in Europe who choose to travel by plane.

Question:
In what month are you leaving for this holiday?

Influence of corona if no holiday plans

The coronavirus pandemic still has a considerable influence on the choice of whether or not to go on holiday. This applies to Chinese travellers in particular. However, that also goes for Great Britain and the United States, where six out of ten people who are not going on holiday indicated that the coronavirus pandemic has had a major impact on this decision. It is striking that in Germany and France the extent to which the coronavirus affects the lack of holiday plans has become more pronounced. In the Netherlands, two out of five people without holiday plans indicated that the coronavirus affected this decision.



■ Very large influence
 ■ Large Influence
 ■ Limited influence
 ■ No influence

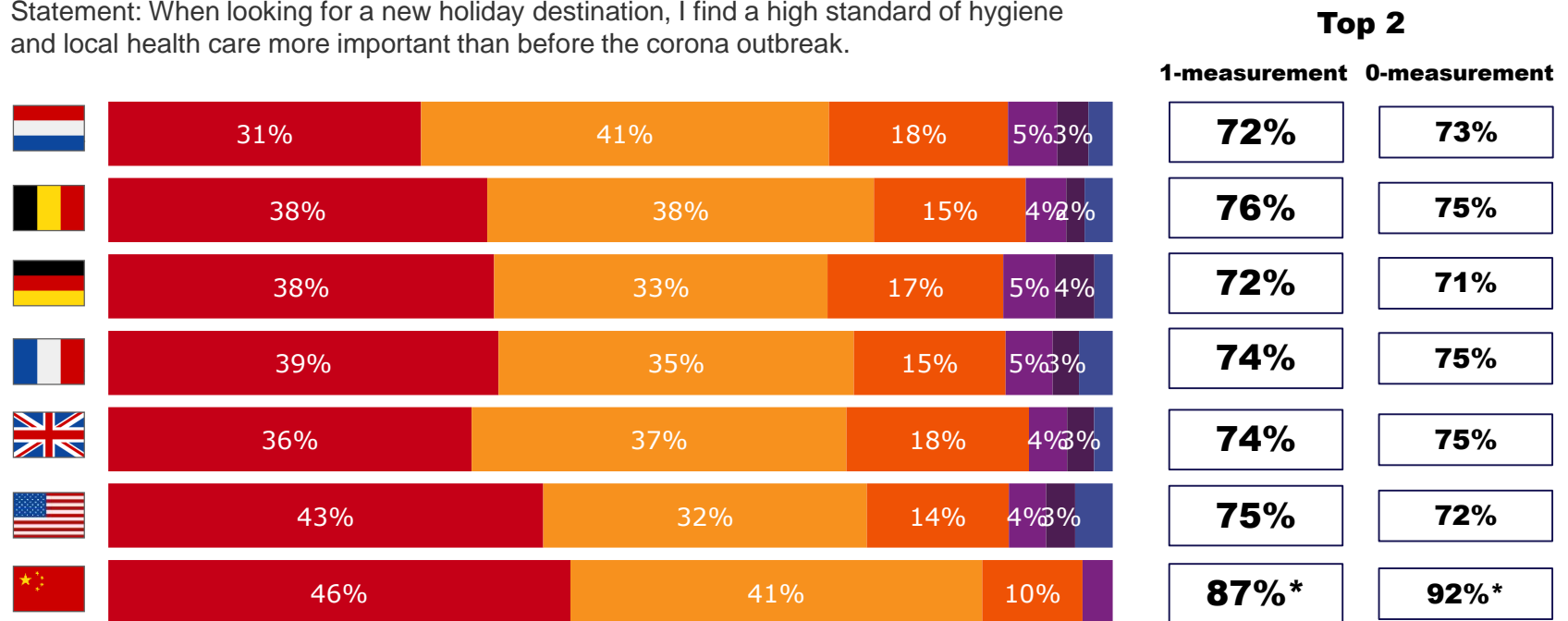
Basis:
People without holiday plans

Question:
To what extent does the current coronavirus/COVID-19 pandemic affect the fact that you have no holiday plans at all at the moment?

Statement: Hygiene and healthcare

The presence of good hygiene and healthcare at the holiday destination plays a greater role in the orientation phase for three-quarters of the people than before the coronavirus pandemic. For travellers from China to a European destination, it is even an absolute prerequisite.

Statement: When looking for a new holiday destination, I find a high standard of hygiene and local health care more important than before the corona outbreak.



■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

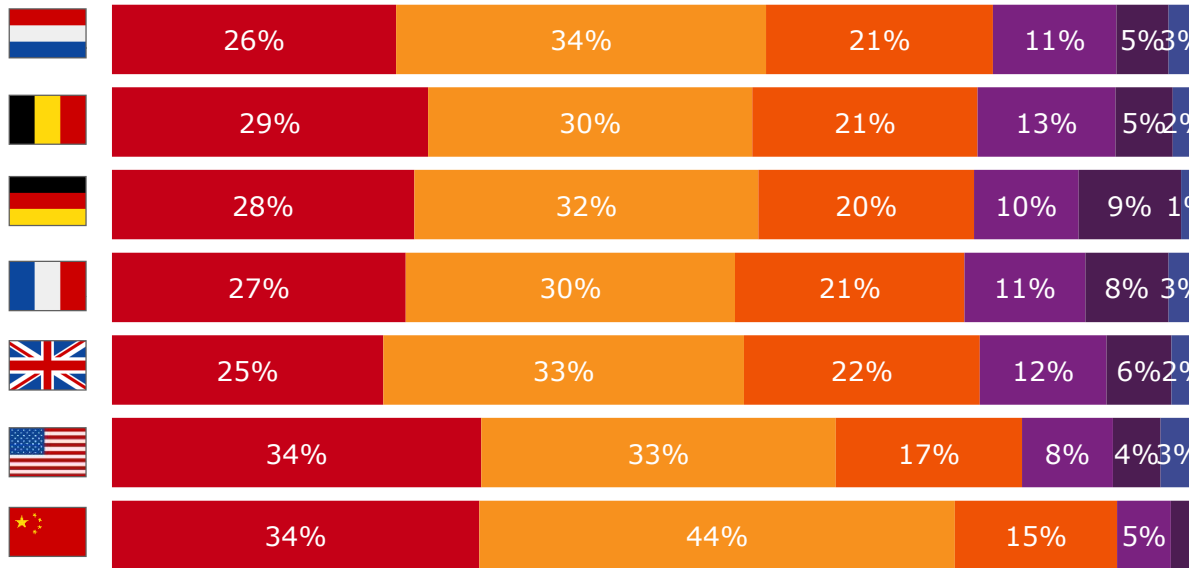
Base:
Total sample

Statement China: When looking for a new holiday destination outside of China, good hygiene and good health care on the spot are more important than before the corona outbreak.

Statement: A holiday closer to home

More than four out of five Chinese people indicated that they prefer a holiday in China because of the coronavirus pandemic. For the other countries, three out of five people said they prefer to spend their holidays closer to home due to the coronavirus.

Statement: Due to the corona outbreak, I prefer to stay closer to home for my holiday(s) in the near future.



Top 2	
1-measurement	0-measurement
60%	64%
59%	61%
60%	60%
58%	59%
58%	59%
67%	64%
78%*	81%*

■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Base:
Total sample

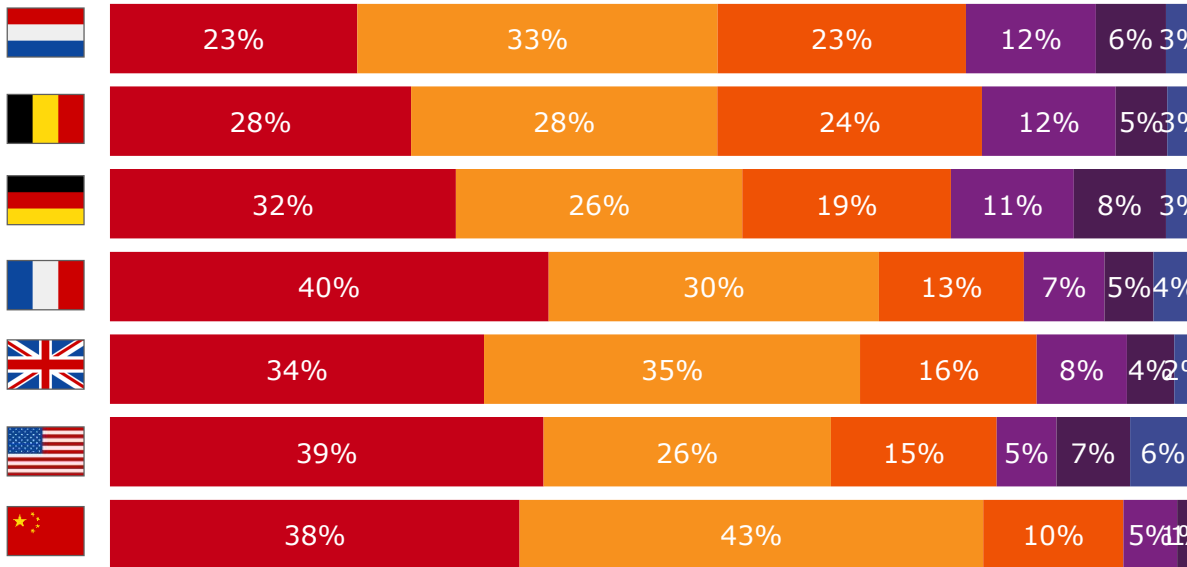
Statement China: Due to the corona outbreak, I prefer to stay in China for my holiday(s) in the coming period instead of travelling to a destination outside of China.

Statement: Travelling when there are no infections

Confidence appears to be returning when it comes to visiting other countries. In most countries, the number of people who indicated that they will not travel to a country until they are sure that there are no more infections, is decreasing.

Statement:

I will only go to another country when I am sure that there are no more corona infections.



Top 2

1-measurement	0-measurement
56%	60%
56% ↓	63%
58%	57%
71%	74%
69% ↓	73%
65%	63%
81%	85%

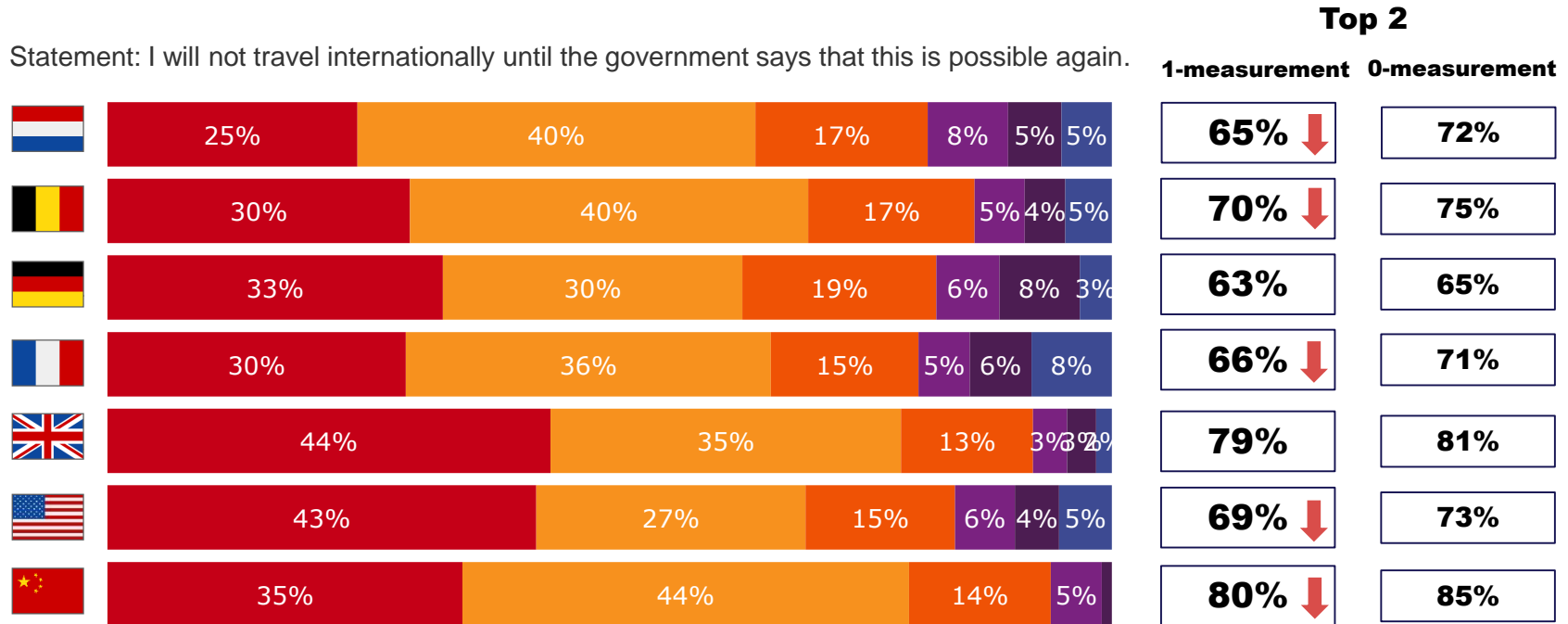
■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Base:
Total sample

Statement: Influence of government advice on travel

Travellers still strongly adhere to the government's advice: in all countries, the majority indicated that they will only travel internationally if the government approves of it. However, it is clear that people's confidence in relying on their own feelings when it comes to international travel is growing. In the Netherlands, Belgium, France, China, and the US it was found that people are less swayed by government recommendations.

Statement: I will not travel internationally until the government says that this is possible again.



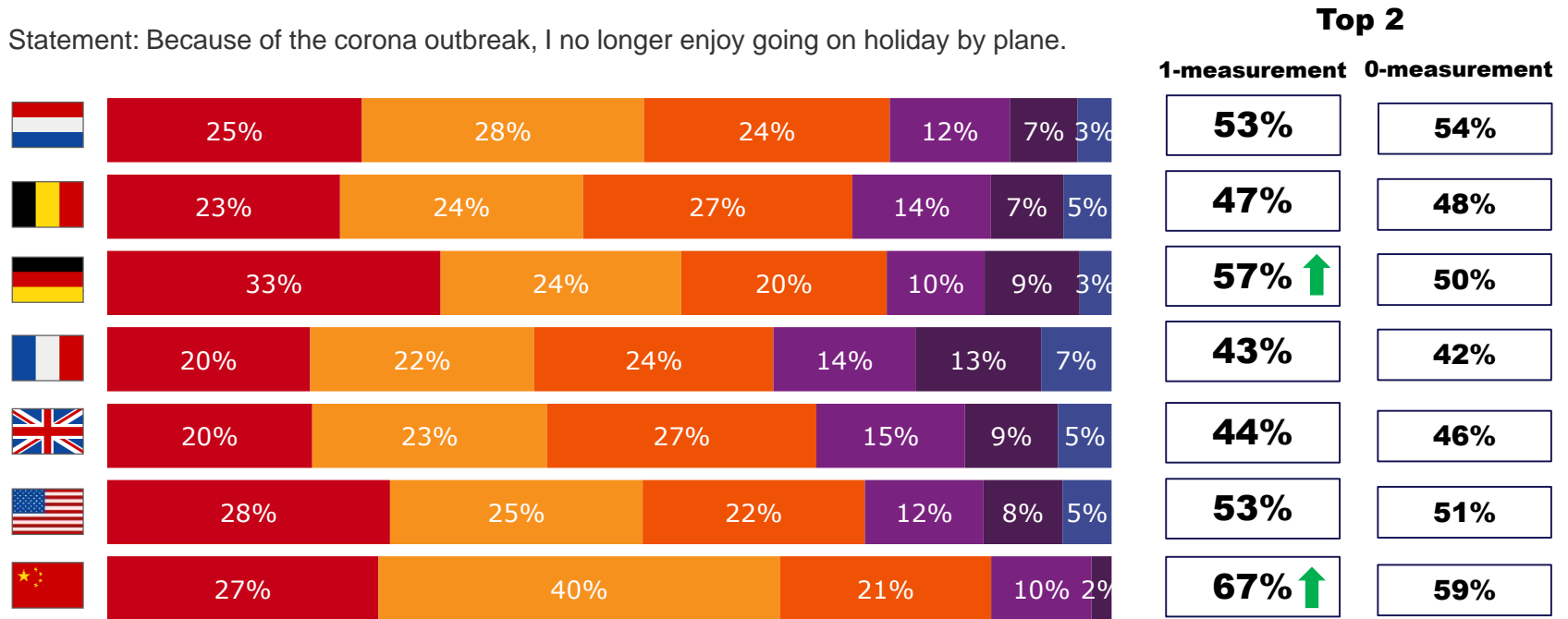
■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Base:
Total sample

Statement: Popularity of flying

In almost all countries, half of the people indicated that, given the current situation, they have a less pleasant feeling about going on holiday by plane. Compared to the first measurement, this feeling has become stronger among German and Chinese travellers.

Statement: Because of the corona outbreak, I no longer enjoy going on holiday by plane.



■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Base:
Total sample

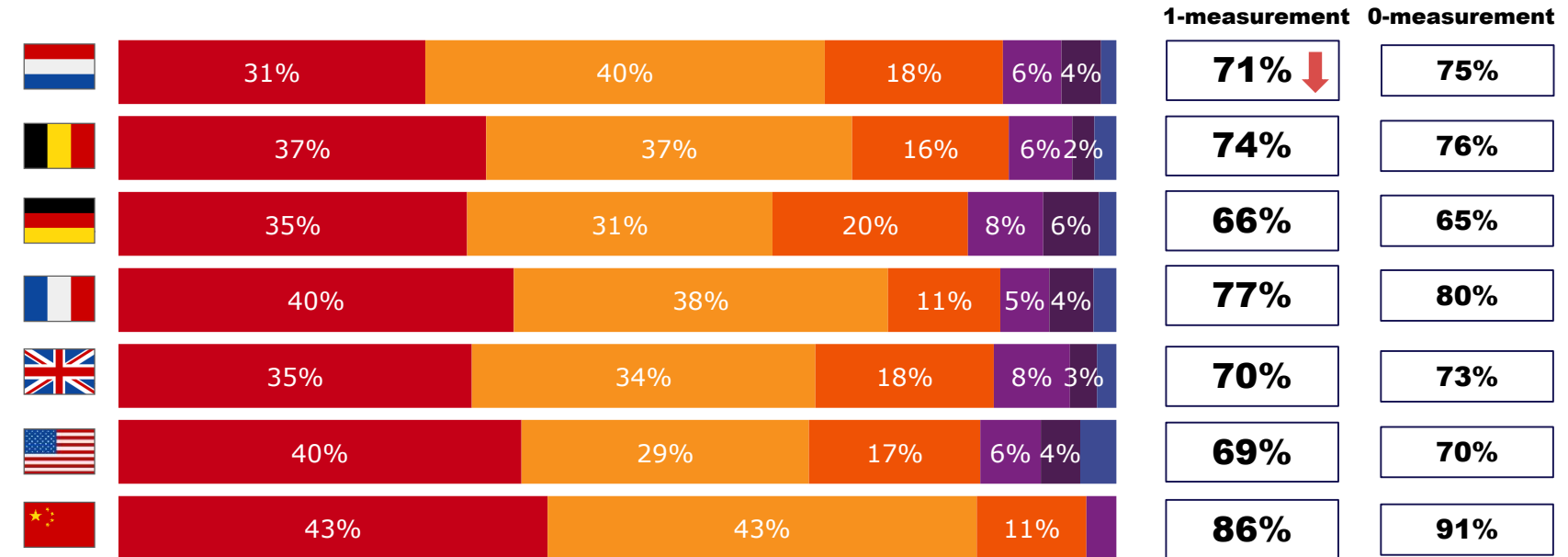
↑ Significant increase

Statement: Busy tourist spots

The Chinese and French, in particular, indicated that they want to avoid crowded tourist spots during their next holiday. The Dutch seem to feel a bit freer again and are less likely to avoid tourist spots.

Statement: Due to the corona crisis, I will avoid busy tourist spots during my upcoming holidays.

Top 2



■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Base:
Total sample




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Group



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