

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

Corona Sentiment Monitor Holiday Plans

June 2020



NBTC
Holland Marketing


Schiphol
Group

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.
- The results of the next measurement are expected to be available July 3.

Specifications of the research

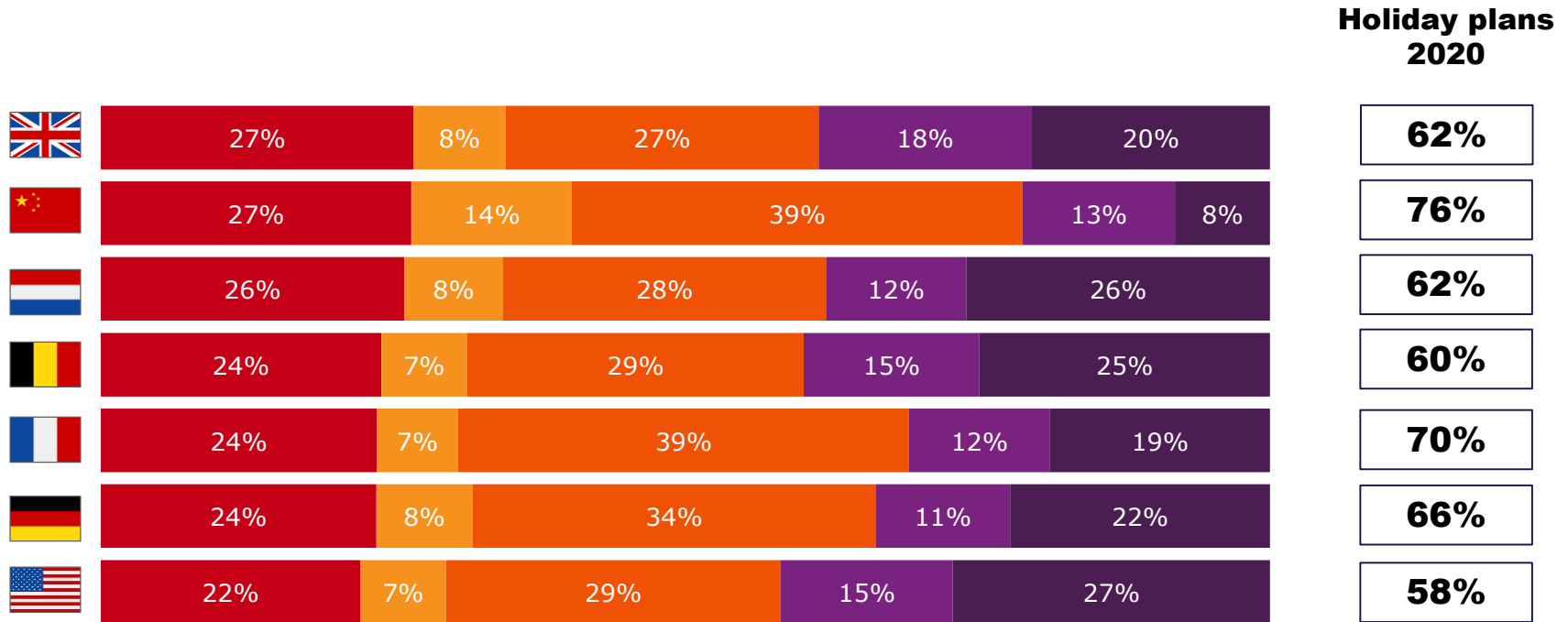
- **Goal:** insights in international holiday plans and influence of corona virus on travel behavior
- **Method:** Online research
- **Doelgroep:** NL / BE / DE / FR / UK / USA / China; 18+ nationally representative
- **Sample source:** The sample is taken from the Dynata consumer panel
- **Sample size:**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

More information

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Holiday intention 2020

In a majority of countries, about a quarter of people have already actually booked a holiday. If we look at the total holiday intention, it is clear that China is already in a different phase: more than three quarters of the people have holiday plans, where this is two thirds or lower for other countries. Of the European countries in this study, the intention in France is the highest.



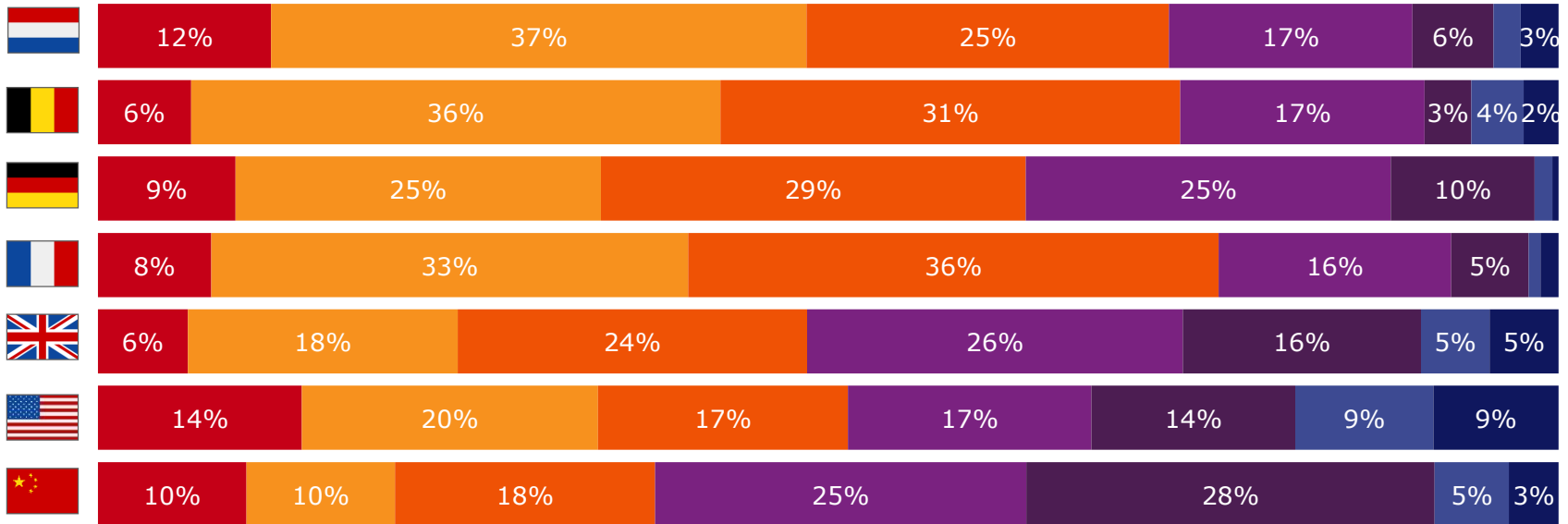
■ Yes, already booked
 ■ Yes, received voucher
 ■ Yes, but still have to book
 ■ No, next year
 ■ No, no intention at all

Base:
Total sample

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

Departure month if booked

The majority of booked holidays take place in July and August. Most Chinese have planned their holidays in September and October. Also from Germany and Great Britain a considerable part takes place in September.



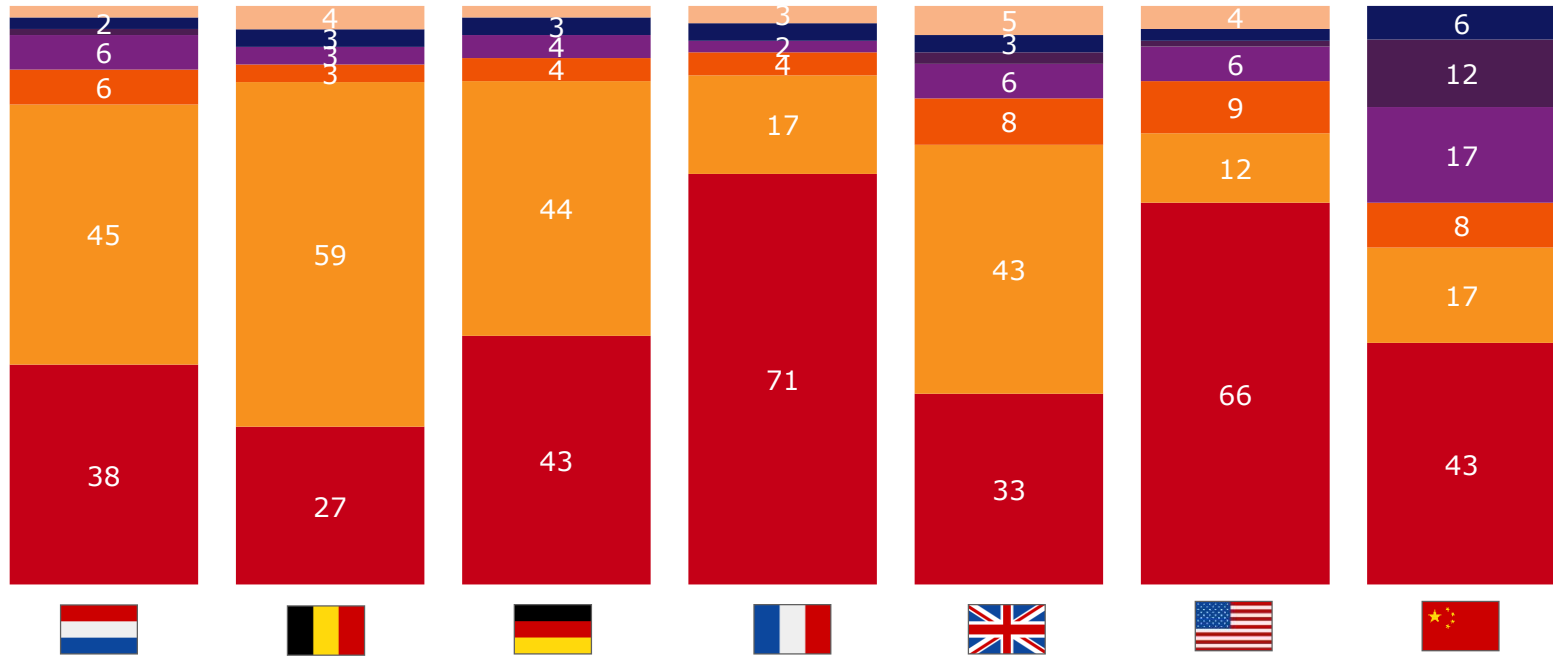
■ June
 ■ July
 ■ August
 ■ September
 ■ October
 ■ November
 ■ December

Base: People who have already booked for a holiday in 2020

Question: In which month in 2020 are you planning to leave for this holiday?

Region / continent

The French Government's call to its citizens to spend their holiday domestically seems to have effect: the French are by far the most likely to plan a holiday in their own country. In the Netherlands, about two out of five people with holiday plans expect to go on holiday in their own country.



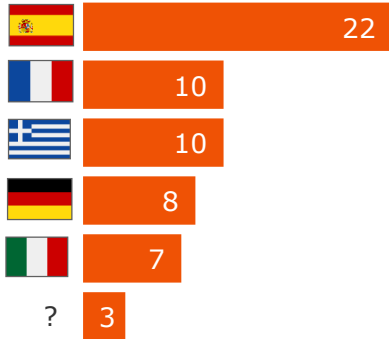
■ Own country
 ■ Europe
 ■ North or South America
 ■ Asia
 ■ Australia/Oceania
 ■ Africa
 ■ Do not know yet

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

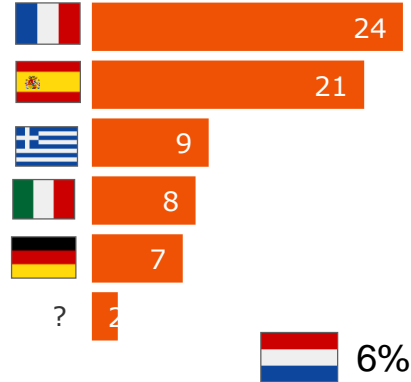
Question:
In which destination do you intend to spend most of this holiday?

European destination - Top 5

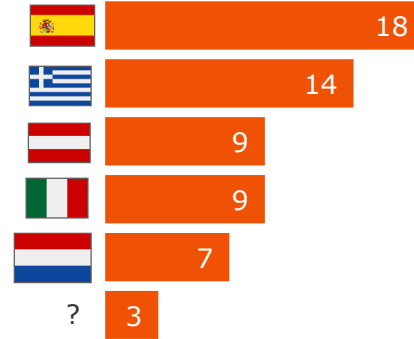
NL



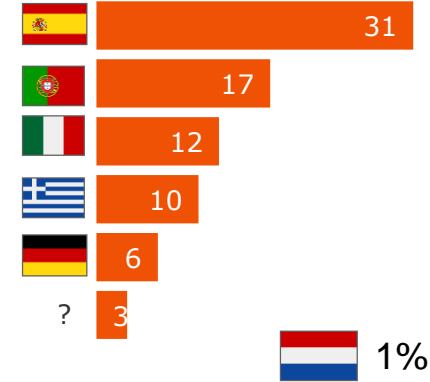
BE



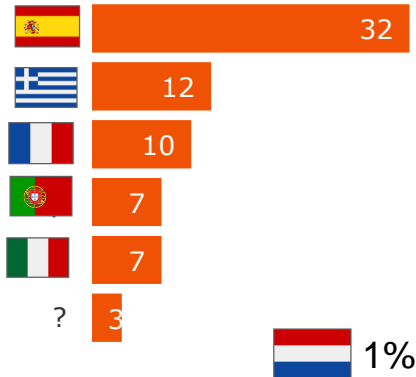
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FR



GB

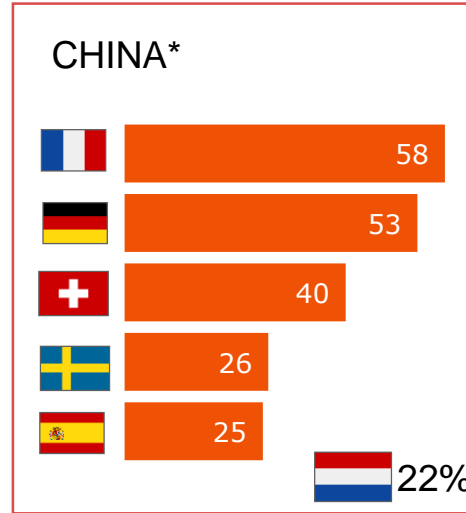
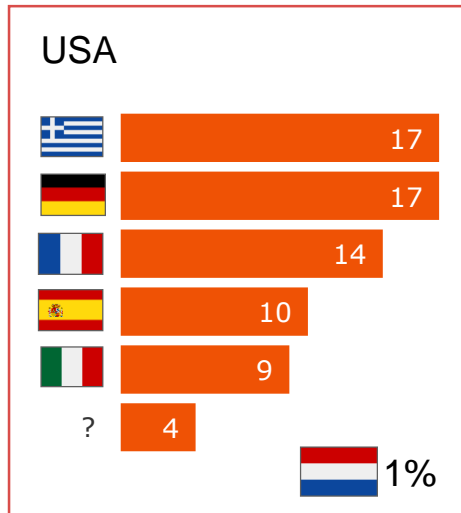


- Spain remains by far the most popular holiday destination overall. This applies to almost every country included in this study.
- Other Mediterranean countries such as Greece, Portugal and Italy remain popular as well, although significantly less than Spain.
- Among Germans with holiday plans in Europe, the Netherlands is the 4th most popular holiday destination this season. Few holidaymakers from Belgium, France and the United Kingdom are expected as well.

Base:
Respondents with holiday plans in a European country.

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

European destination - Top 5



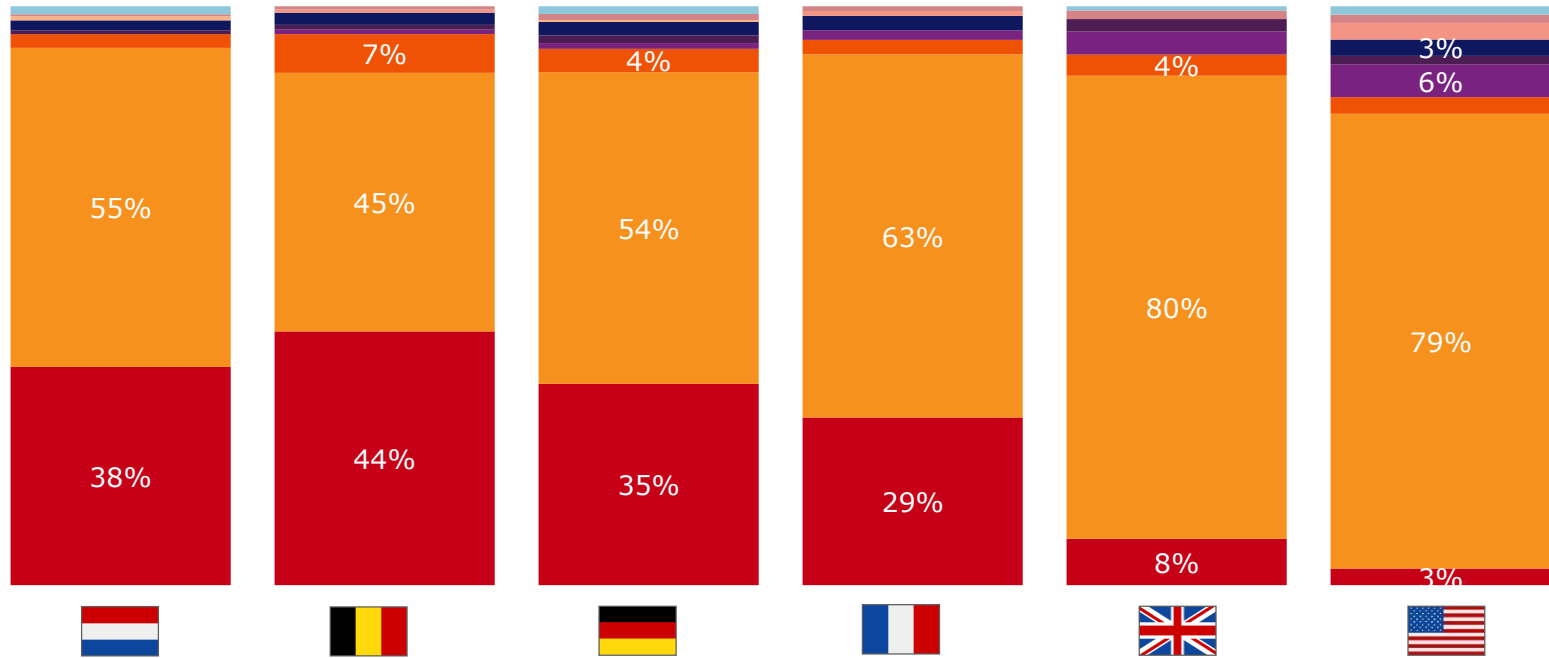
- Two out of five people with holiday plans to Europe and living in the USA choose Greece or Germany as their main destination. Only a few choose the Netherlands as their main destination for their stay in Europe.
- Chinese holidaymakers who travel to Europe often stay in multiple countries. More than half of the Chinese with holiday plans to Europe will visit France and/or Germany and more than 20% intend to visit the Netherlands.

Base:
Respondents with holiday plans in a European country.

Question:
Where in Europe do you plan to spend most of this holiday?
* Chinese respondents were able to choose multiple countries.

Means of transport when traveling to a European destination

If case of European holiday plans, the plane is the most popular means of transport. Particularly the French expect to travel by plane.

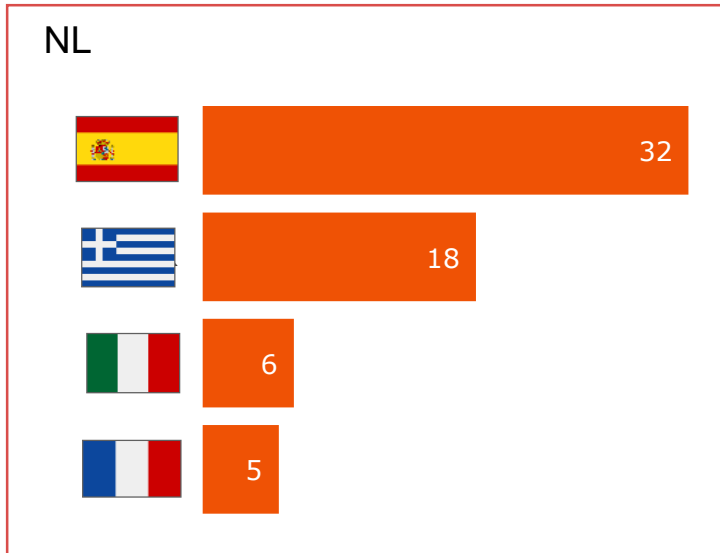


■ Car
 ■ Plane
 ■ Train
 ■ Boat
 ■ Campervan
 ■ Coach
 ■ Bicycle/moped
 ■ Motorbike
 ■ Different
 ■ Don't know yet

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 of Dutch people by plane



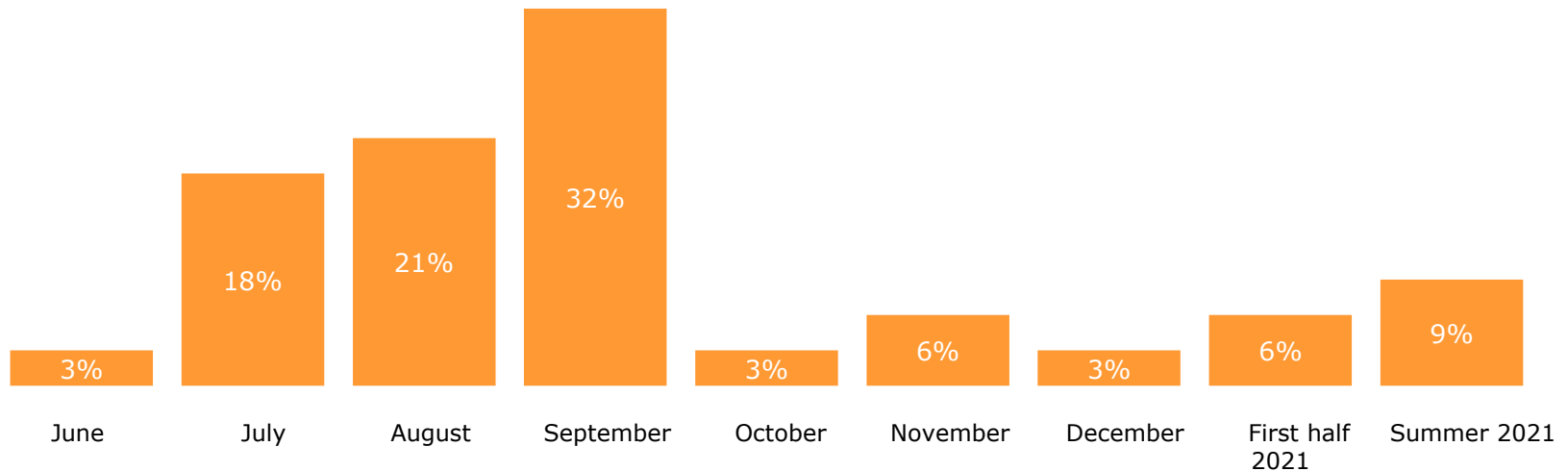
- Even in these times, Spain remains by far the most popular holiday destination for Dutch people traveling by plane.
- Greece is popular as well, although significantly less than Spain.
- Italy, and to a lesser extent France, follow at a respectable distance.

Base:
Dutch people with holiday plans who choose plane as a means of transport.

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

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

- 42% of all Dutch travelers with the intention of going on holiday by plane still want to go during the traditional summer months (June, July and August). Remarkably, more than 30% might want to play it safe and go on holiday in September (after the traditional summer months).
- About one in ten postpone their holiday until the summer break next year.
- More than a third of all Dutch people with the intention to fly to a European holiday destination have received a voucher for that holiday from a previously canceled flight.



Base:
Dutch people with holiday plans within Europe who choose the plane as a means of transport.

Question:
In which month in 2020 are you planning to leave for this holiday?

Travel motives



1. Relaxation 34%
2. Getting away 26%
3. Quality time with family/friends 16%
4. Experience culture 11%
5. Improve physical and mental vitality/health 5%



1. Relaxation 34%
2. Quality time with family/friends 24%
3. Getting away 20%
4. Experience culture 8%
5. Improve physical and mental vitality/health 5%



1. Relaxation 42%
2. Quality time with family/friends 19%
3. Getting away 13%
4. Experience culture 11%
5. Improve physical and mental vitality/health 5%



1. Quality time with family/friends 30%
2. Relaxation 29%
3. Getting away 19%
4. Experience culture 8%
5. Improve physical and mental vitality/health 4%



1. Relaxation 26%
2. Quality time with family/friends 25%
3. Getting away 22%
4. Experience culture 11%
5. Improve physical and mental vitality/health 3%



1. Quality time with family/friends 32%
2. Relaxation 20%
3. Getting away 20%
4. Experience culture 8%
5. Meeting people 4%

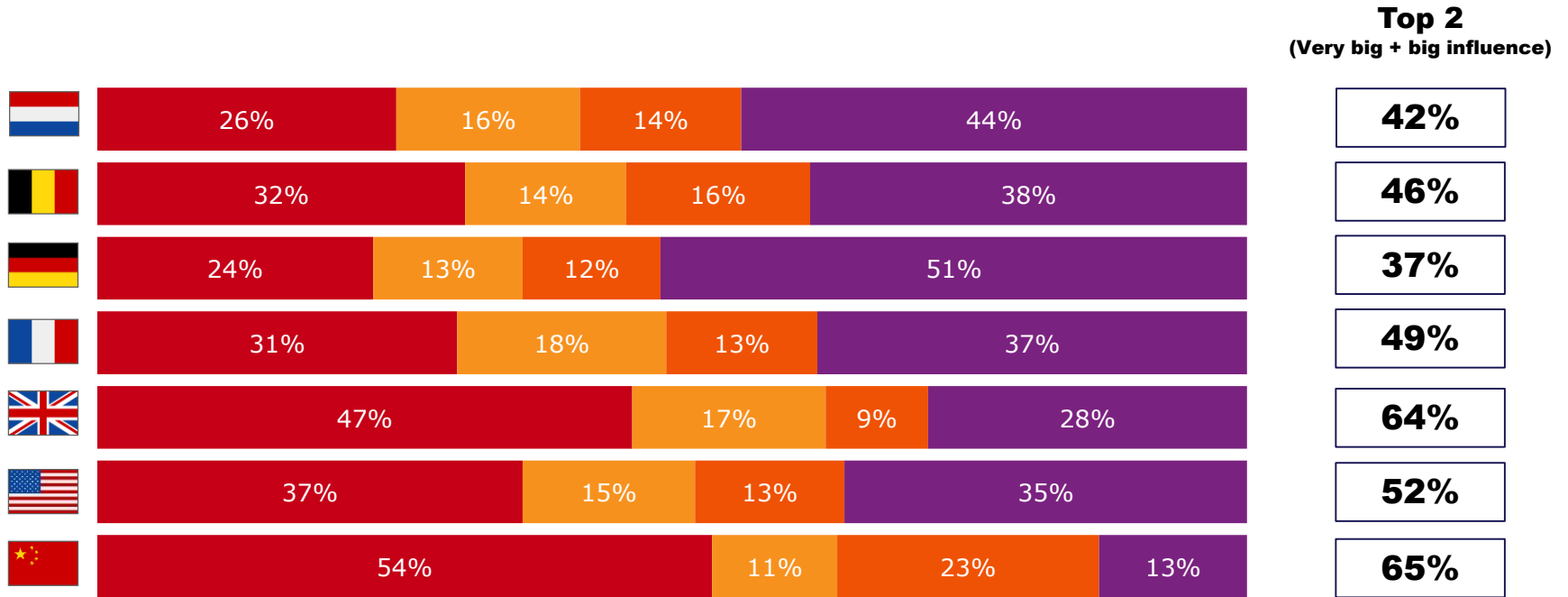


1. Experience culture 36%
2. Relaxation 30%
3. Shopping 17%
4. Improve physical and mental vitality/health 10%
5. Getting away 4%

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

Influence of corona if no holiday plans

The corona outbreak seems to have a significant impact on whether or not to go on holiday. This is especially true for Great Britain and China, where two thirds of the people who do not go on holiday indicate that the coronavirus outbreak has had (very) significant influence on this choice. In Germany, the outbreak has less of an impact. In the Netherlands, two out of five people without holiday plans indicate that the corona outbreak has influenced this choice.



■ Very big influence
 ■ Big influence
 ■ Limited influence
 ■ No influence

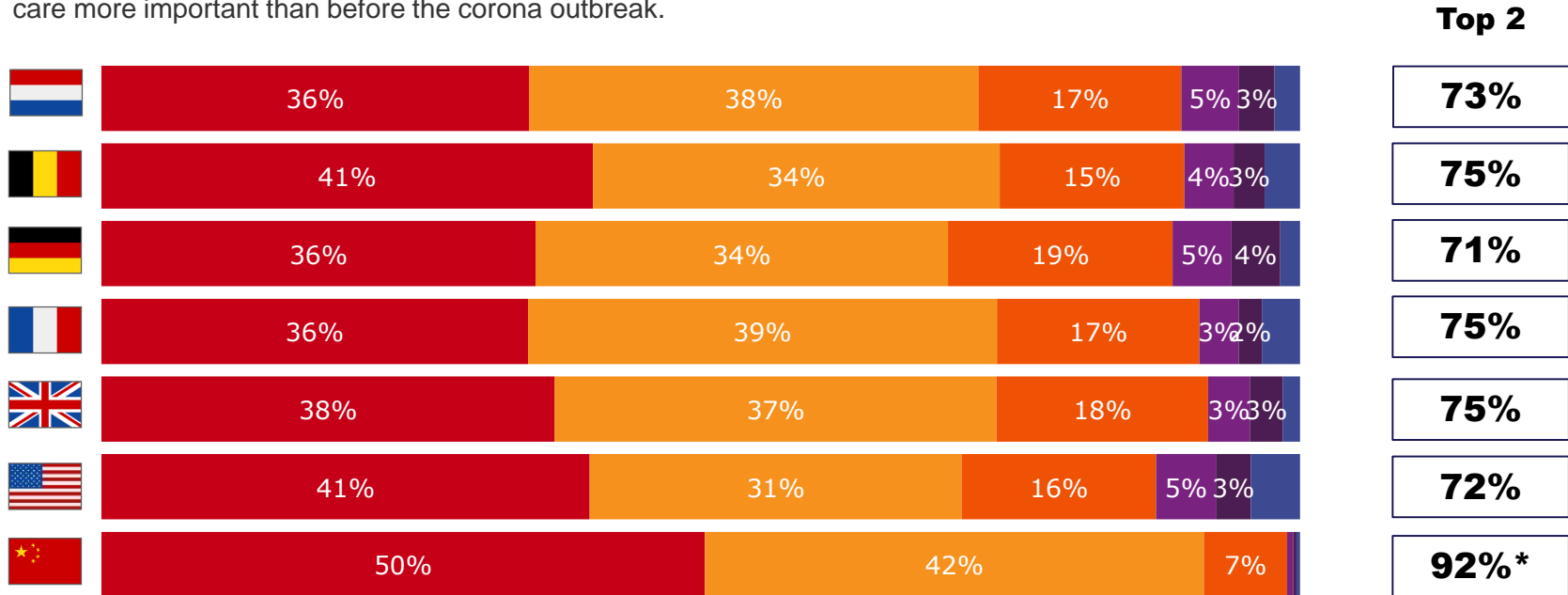
Base:
People without holiday plans

Question:
To what extent has the current corona crisis / covid19 crisis influenced the fact that you do not have any holiday plans at this time?

Statement: Hygiene and health care

The presence of good hygiene and health care at the holiday destination plays a greater role for three-quarters of the people in the orientation phase than before the corona outbreak. In China it is even an absolute precondition.

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

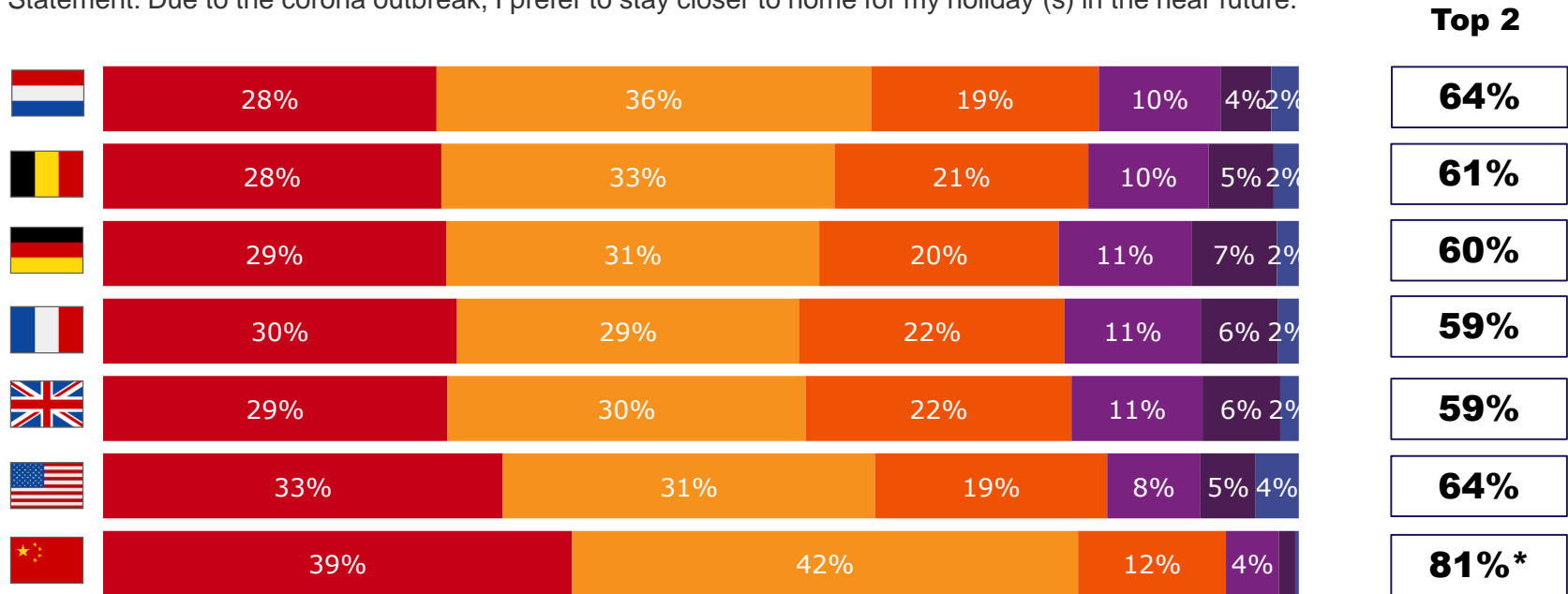
Statement China: When looking for a new holiday destination outside of China, good hygiene and good health care on the spot are more important than before the corona outbreak.

Statement: Closer to home on holiday

More than four out of five Chinese people indicate that they prefer a holiday in China because of the corona outbreak.

For the other countries, three out of five people say they prefer a holiday closer to home as a result of the corona outbreak.

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



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

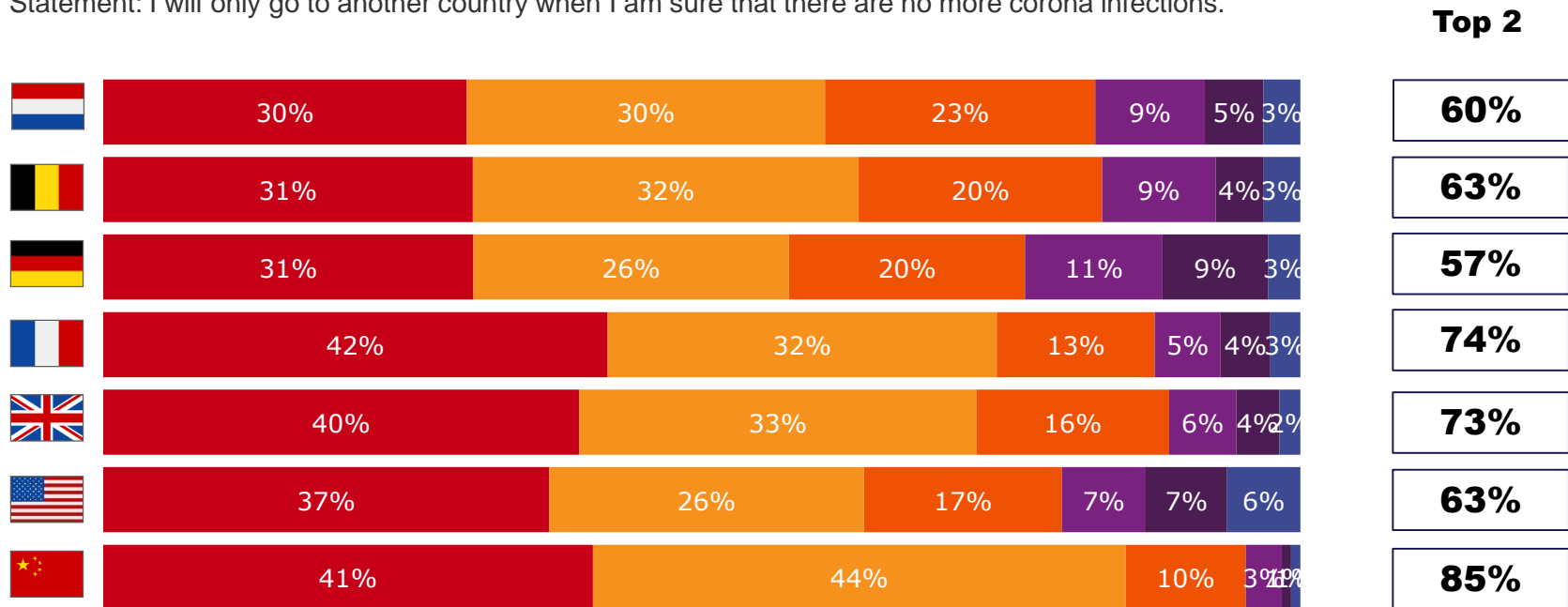
Base:
Total sample

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: Travel when there are no infections

Where most Chinese people only consider traveling to another country if they are sure that there are no infections there, Dutch and German people see less danger and are more likely to travel.

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



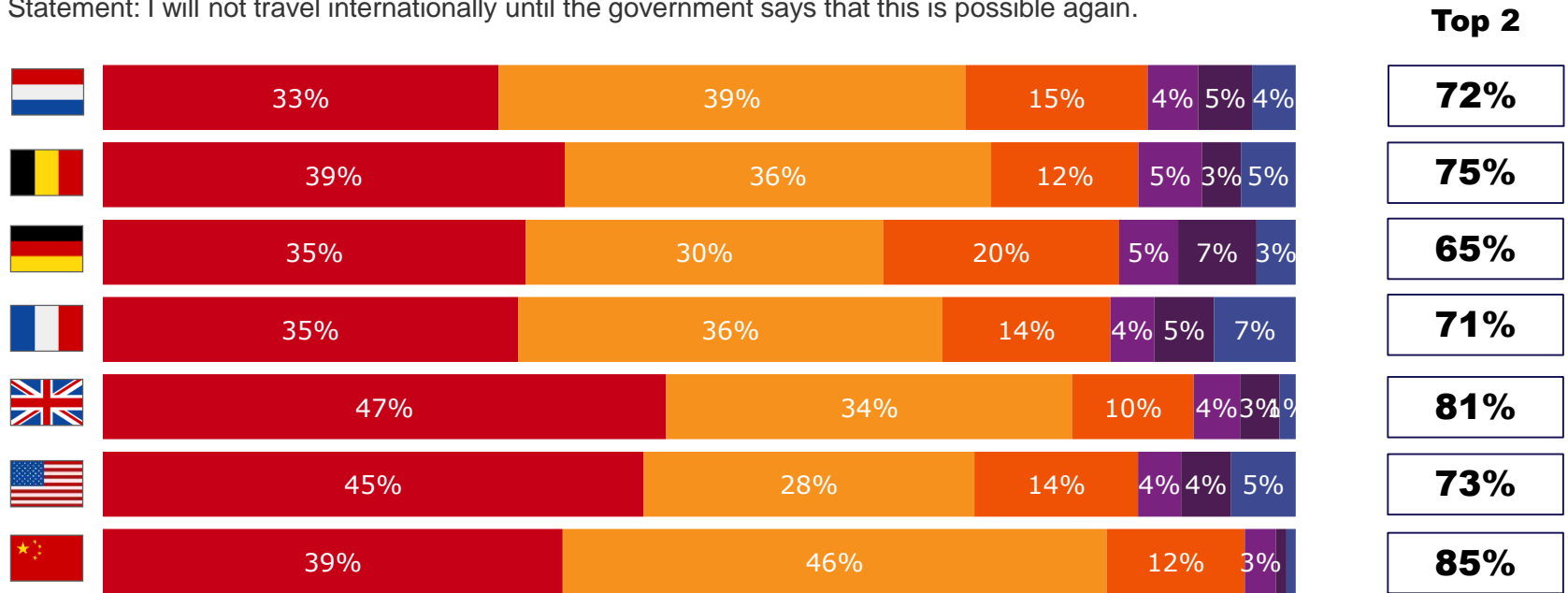
■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Base:
Total sample

Statement: Influence of government advice on travel

Travelers strongly adhere to the advice of the government: in all countries a large majority indicate that they will only travel internationally if the government advises positively on this. This is especially true for people from China and UK. Germans base their choice to travel internationally to a lesser extent on the advice of the government.

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



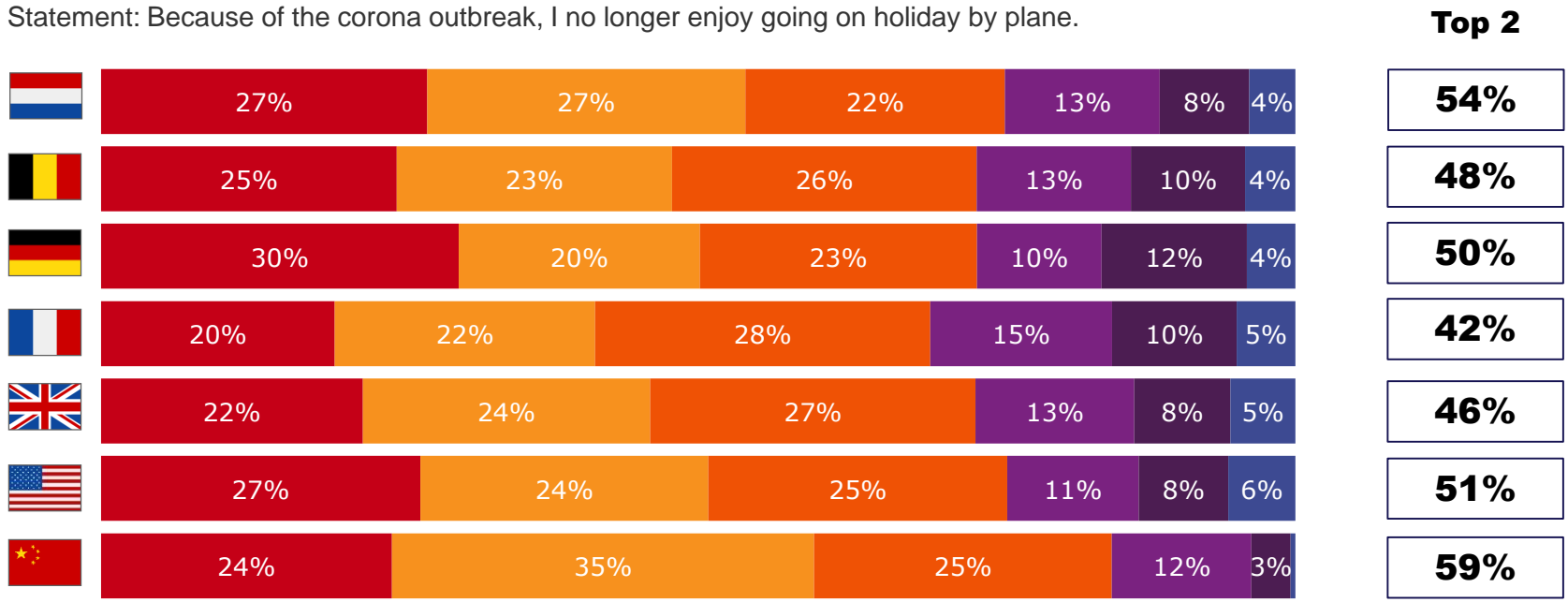
■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Base:
Total sample

Statement: Popularity of flying

Although the plane is the most popular means of transport for a holiday, in almost all countries nearly half of the people indicate that, given the current situation, they have a less pleasant feeling going on holiday by plane. This feeling is not as prominent among the French compared to the other countries.

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

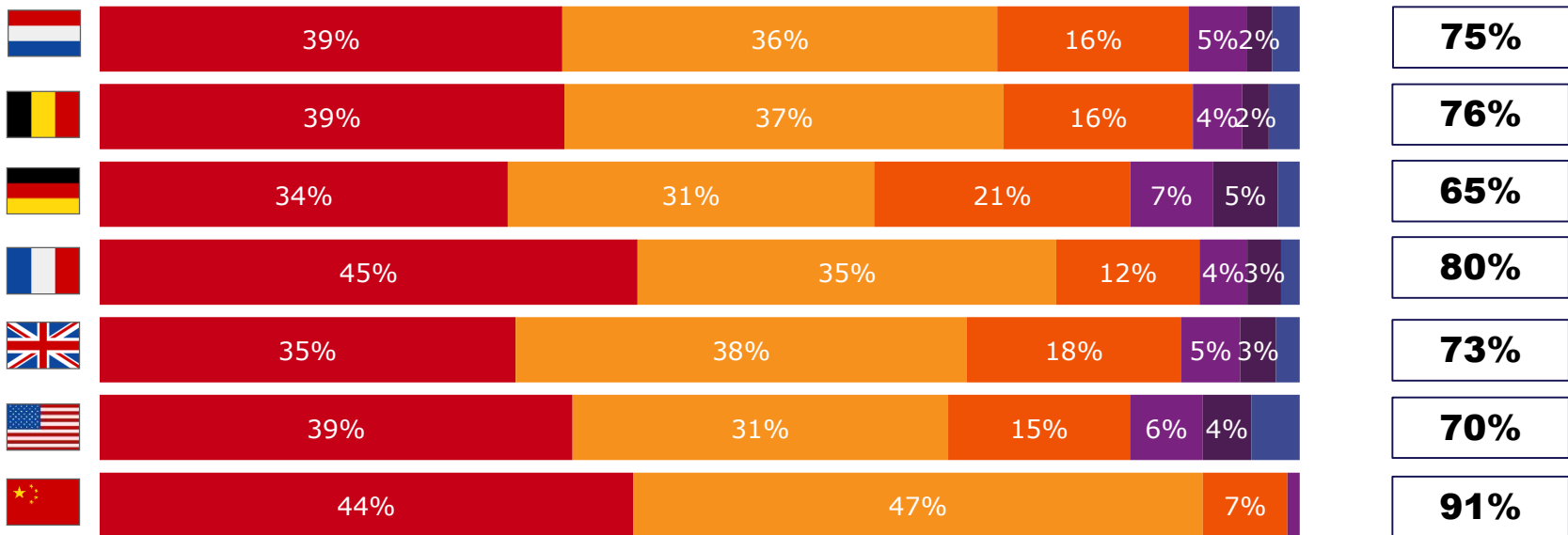
Statement: Busy tourist spots

The Chinese and French in particular indicate that they want to avoid busy tourist spots during the next holiday.

This sentiment is not as prominent among Germans.

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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