

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

Corona Sentiment Monitor Holiday Plans

Third measurement

August 2020



NBTC
Holland Marketing



Research design

- In collaboration with NBTC Holland Marketing, Schiphol (the departments of Customer Insights and Aviation Marketing, Cargo and Customer Experience) is conducting an international monitor into a.o. the travel- and holiday intention and sentiment during the coronavirus pandemic.
- The monitor will be repeated multiple times in the coming months in order to observe developments, considering attitude and behaviour will change depending on developments regarding the coronavirus pandemic in the Netherlands and abroad.

Specifications of the research

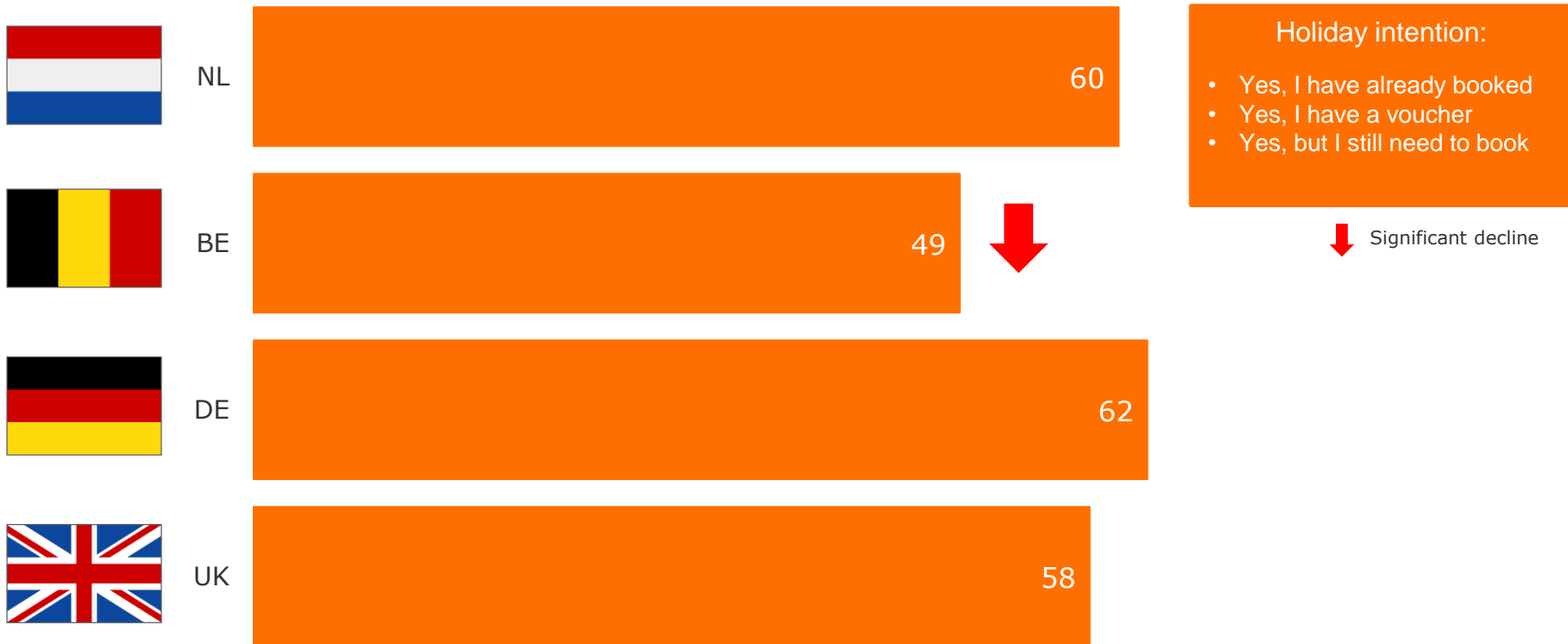
- **Objective:** Insights in international holiday plans and influence of coronavirus pandemic on travel behavior
- **Method:** Online research
- **Target group:** baseline measurement and 1-measurement: NL / BE / DE / FR / UK / USA / China
2-measurement: NL / BE / DE / UK
- **Sample source:** The sample was provided by the Dynata consumer panel
- **Sample size:** Net n=1,000 per country (18+ nationally representative for age, gender and region)
- **Fieldwork period:** baseline measurement: May 21 to June 1, 2020
1-measurement: June 17 to June 26, 2020
2-measurement: July 24 to July 28, 2020

More information

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Holiday intention 2020 (1/3)

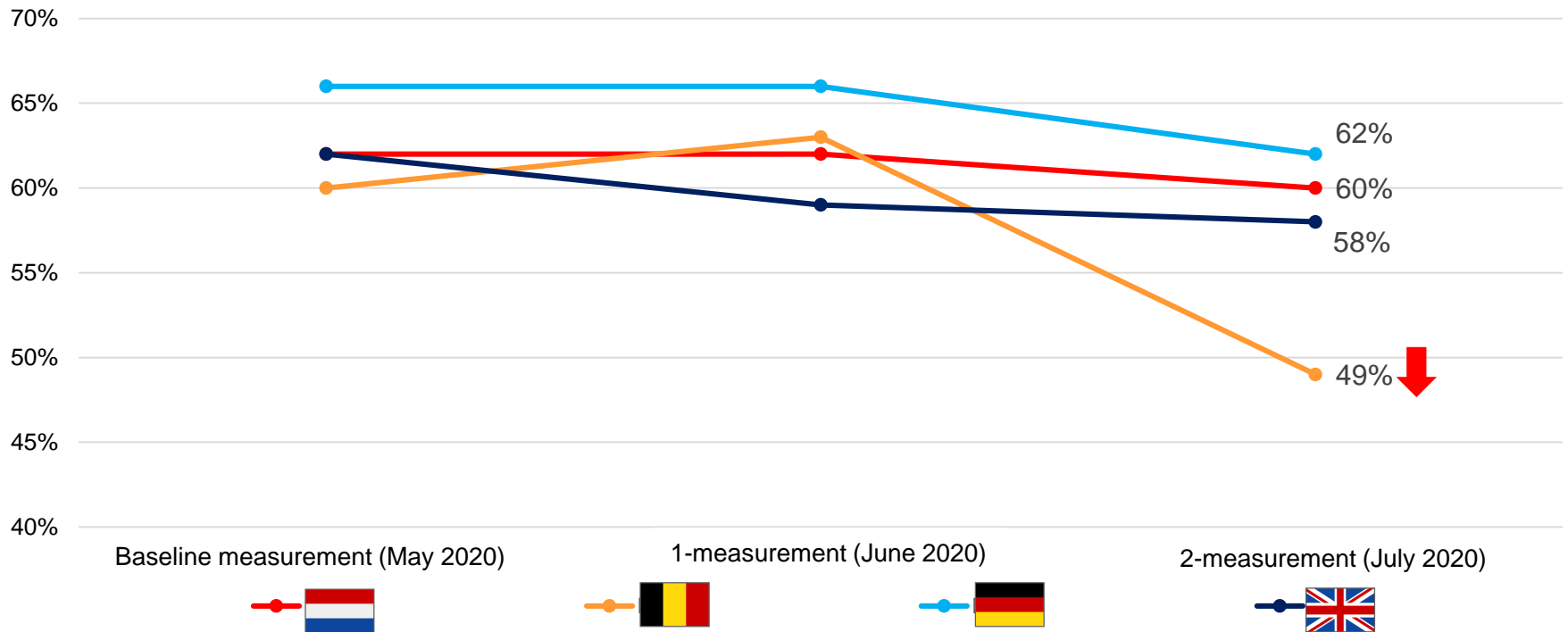
In the Netherlands, Germany and the United Kingdom, six out of ten people have indicated an intention to go on holiday. For Belgium, the current situation with regard to the growing number of new infections appears to be having an impact on the number of holidaymakers. The intention to go on holiday is considerably lower there compared to other countries.



Holiday intention 2020 (2/3)

Overall, the holiday intention in all countries shows a downward trend. In Belgium in particular, the current situation is causing a considerable decline in the number of people with holiday plans.

Development holiday intention:



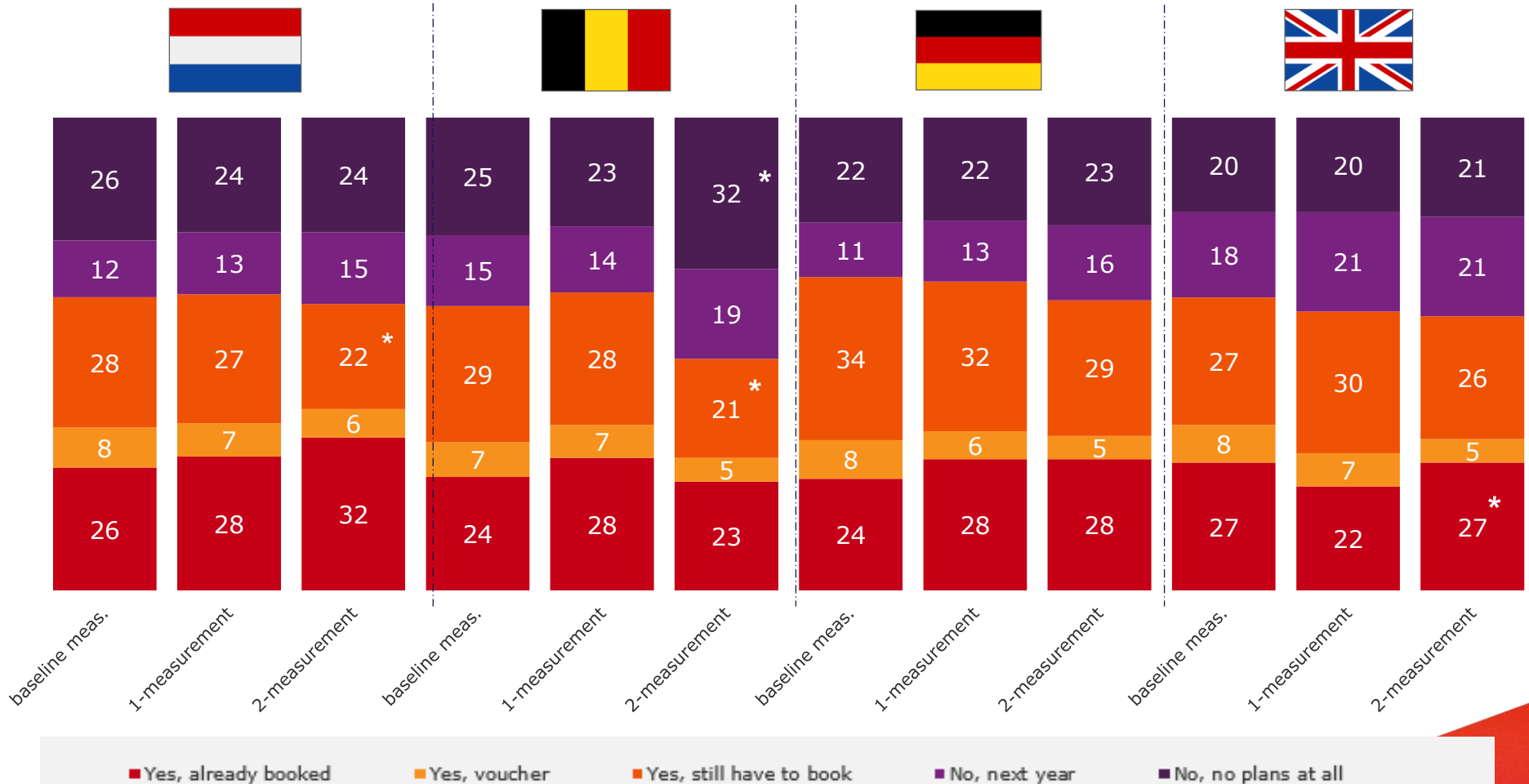
Based on:
total sample

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

↓ Significant decline

Holiday intention 2020 (3/3)

Overall, the holiday intention in all countries shows a downward trend. When we look at the specific categories, we see an increase in the number of bookings in the Netherlands and England and a decline in the number of people who haven't booked yet but plan to. In Belgium both the number of bookings and the expected bookings are declining, while in Germany all the categories remain stable.



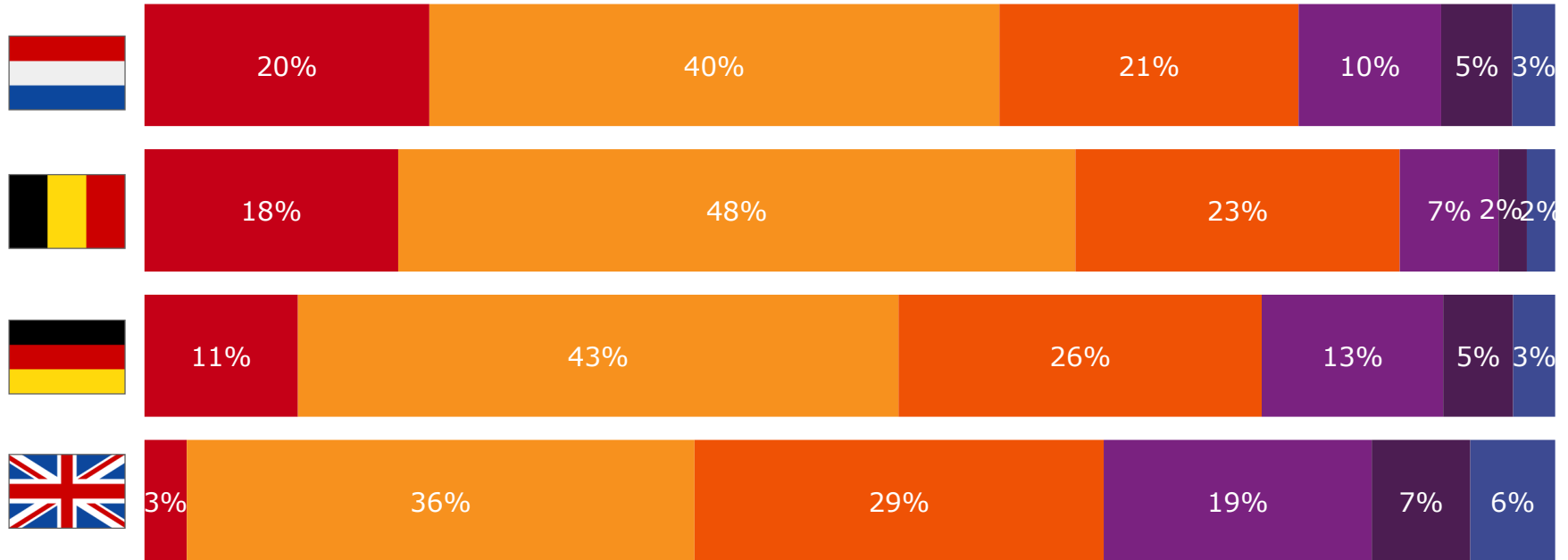
Based on:
Total sample

*: significant difference

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

Month of departure if booked

Holidays that have already been booked are primarily taking place in the months of July and August. From Great Britain, a considerable number of holidays are still scheduled for in September.











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

Based on:
People who have already booked a holiday in 2020

Question:
In which month are leaving for this holiday?

Month of booking – last-minute holidays

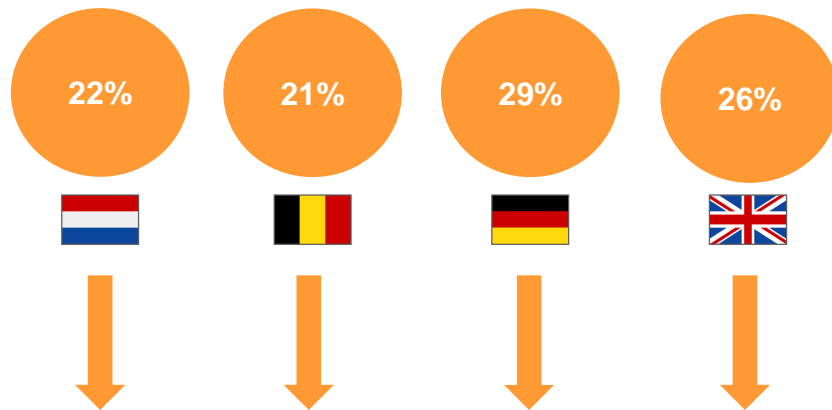
Lots of people are waiting to see how the coronavirus situation develops before actually booking. Of all the people who have booked a holiday for the month of August, 50% booked this holiday one to two months in advance.

	July				August			
								
Month of booking:								
January	12%	17%	10%		14%	11%	7%	13%
February	4%	7%	3%		6%	14%	9%	5%
March	9%	5%	0%		7%	9%	4%	4%
April	4%	12%	10%		7%	6%	9%	1%
May	15%	14%	13%		11%	9%	6%	4%
June	18%	17%	19%		18%	15%	18%	16%
July	21%	12%	29%		28%	26%	32%	43%
Last year (2019)	15%	17%	13%		10%	7%	14%	13%
Other	3%	0%	3%		1%	4%	1%	0%
Sample	N=68	N=42	N=31	N too low	N=136	N=114	N=125	N=99

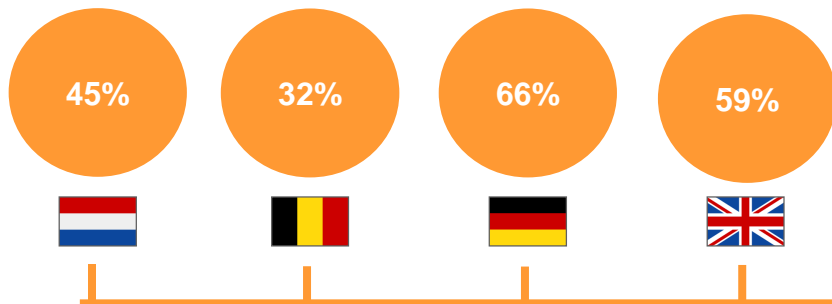
Potential holidays

Around a quarter of the people do intend to go on holiday but still have to book. Of this group, half has indicated that they are already looking for a holiday. For this group, the months of August and September are the most important months of departure.

Holiday intention but still need to book



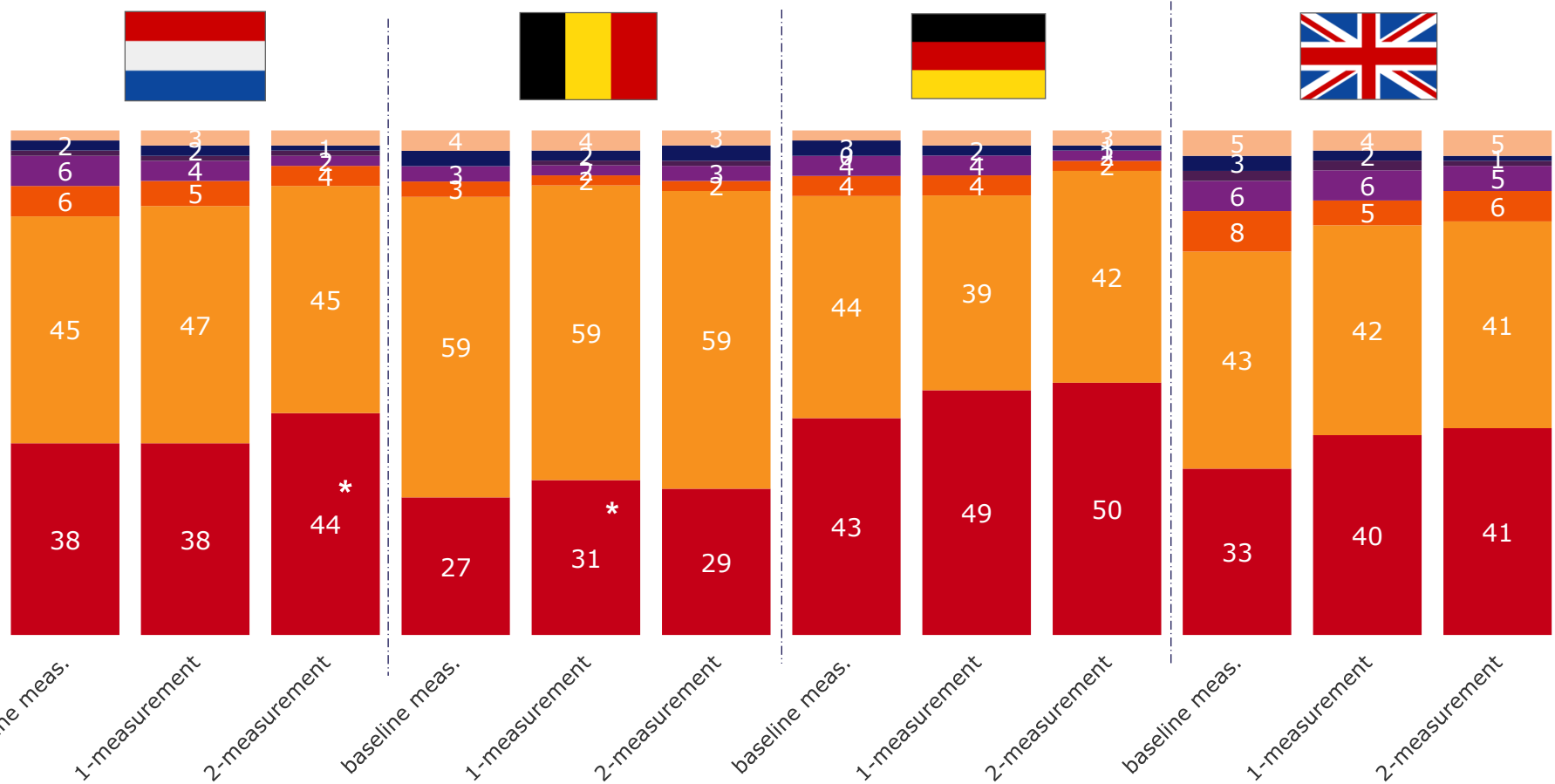
Looking for holiday destinations



Month of departure:				
July	2%	4%	2%	1%
August	31%	35%	20%	22%
September	31%	35%	33%	32%
October	17%	7%	26%	14%
November	1%	7%	5%	11%
December	8%	3%	9%	9%
Other/don't know	12%	9%	7%	11%
Sample	N=106	N=72	N=198	N=158

Region/Continent

Where the proportions remained the same in other countries, a significant increase can be observed in the Netherlands with regard to the number of people with plans to go on holiday in their own country.



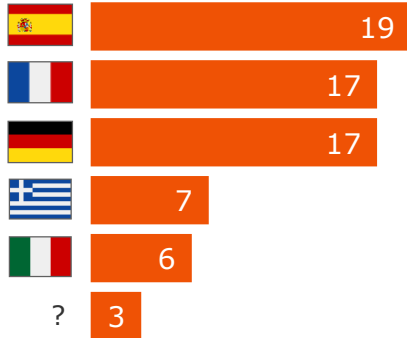
■ Own country
 ■ Europe
 ■ North-America/South-America
 ■ Asia
 ■ Australia/Oceania
 ■ Africa
 ■ Not sure yet

Based on:
 People with holiday plans (booked/voucher/ still have to book)
 *: **significant increase**

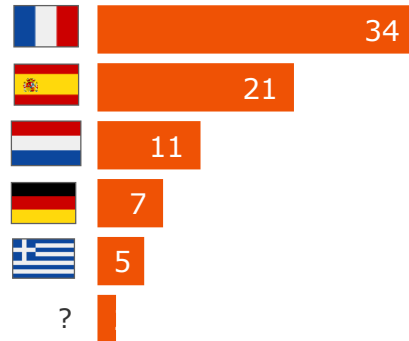
Question:
 Where do you plan to spend the majority of your holiday?

Top 5 European destinations – The Netherlands becomes more popular!

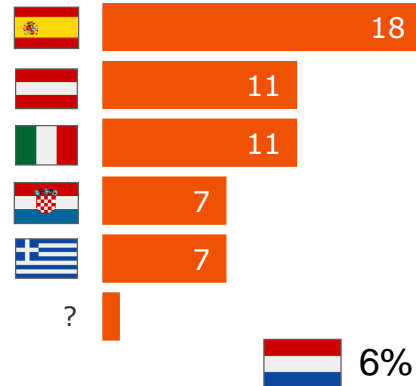
NL



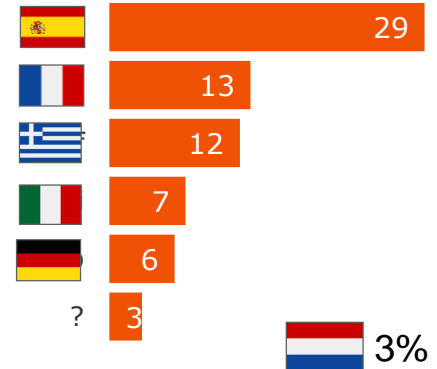
BE



DE



GB



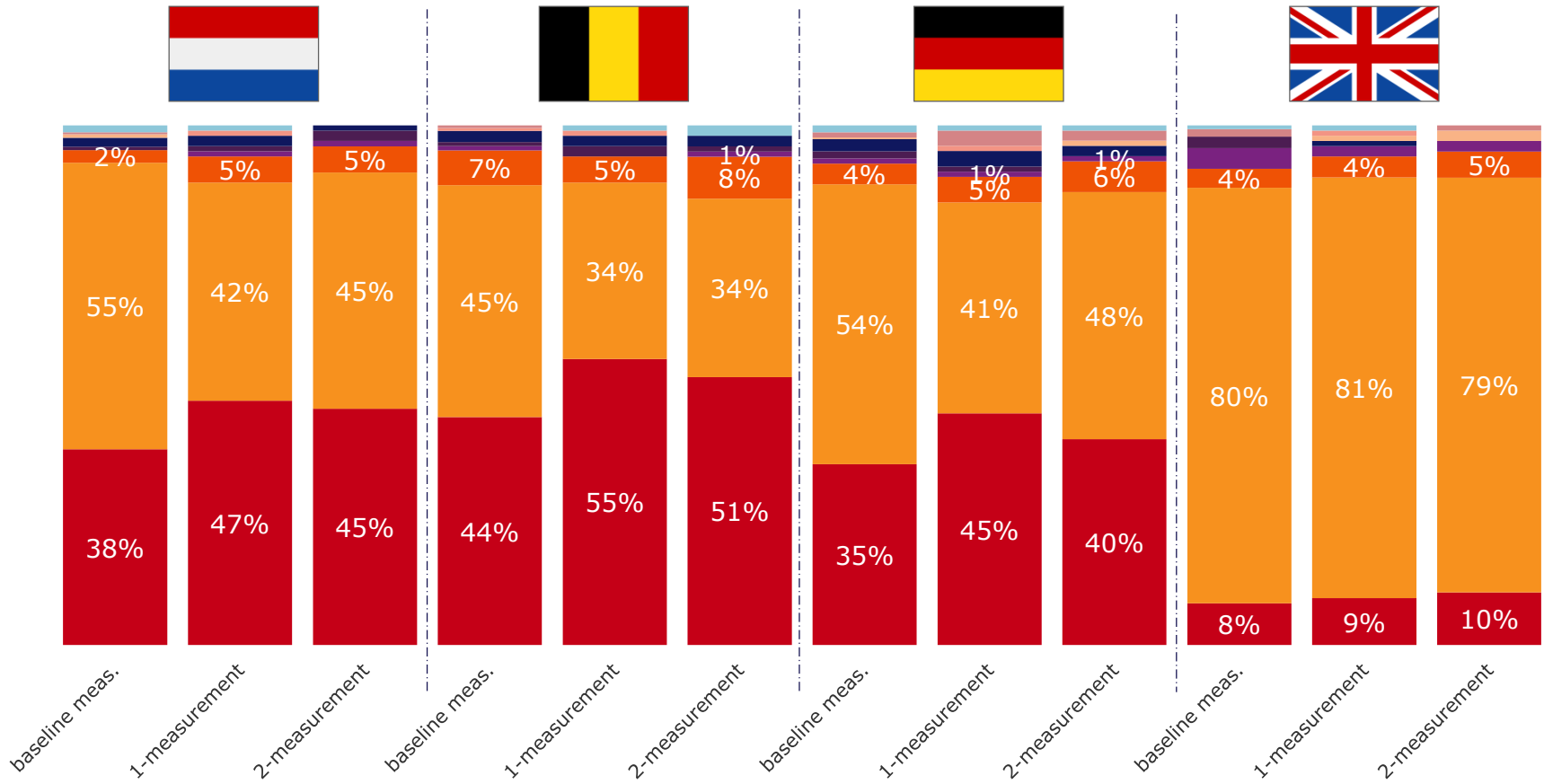
- Spain remains the most popular holiday destination by far even during these times. Not only among Dutch holidaymakers but also for people from Germany and Great Britain.
- Other countries with a Mediterranean character such as Greece and Italy remain popular, though considerably less so than Spain.
- Compared to the first measurement, the Netherlands has clearly become more popular among Belgian holidaymakers. In Germany the position of the Netherlands remains equal, while its popularity has declined slightly among holidaymakers from Great Britain.

Based on:
Respondents with holiday plans in a European country.

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

Mode of transportation for holidays in Europe

Compared to the previous measurement, airplanes have become more popular among German holidaymakers. The ratio between car and airplane holidays has remained equal in other countries.

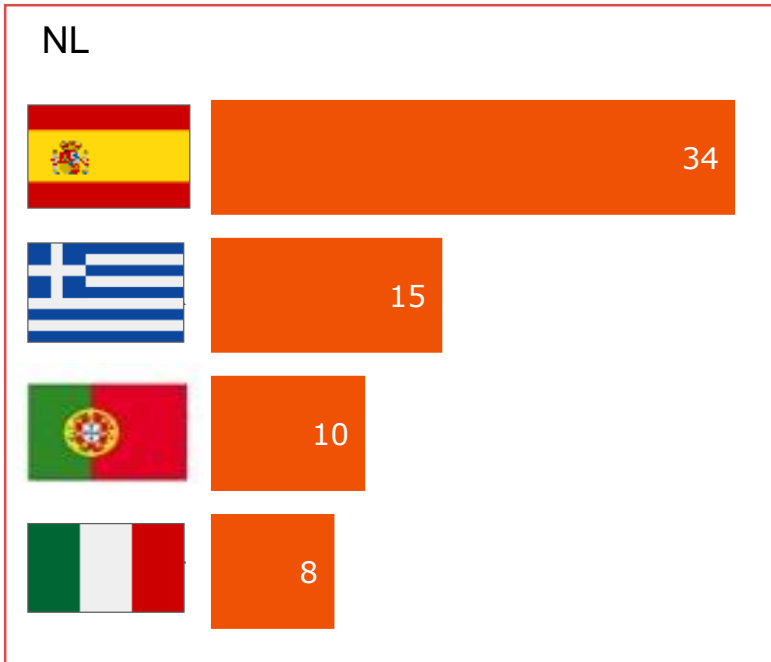


■ Car
 ■ Plane
 ■ Train
 ■ Boat
 ■ Campervan
 ■ Coach
 ■ Bicycle/moped
 ■ Motorbike
 ■ Different
 ■ Don't know yet

Based on:
Respondents with holiday plans in a European country.

Question:
Which mode of transportation are you planning to take to your holiday destination in Europe?

Top European destinations for Dutch people travelling by plane



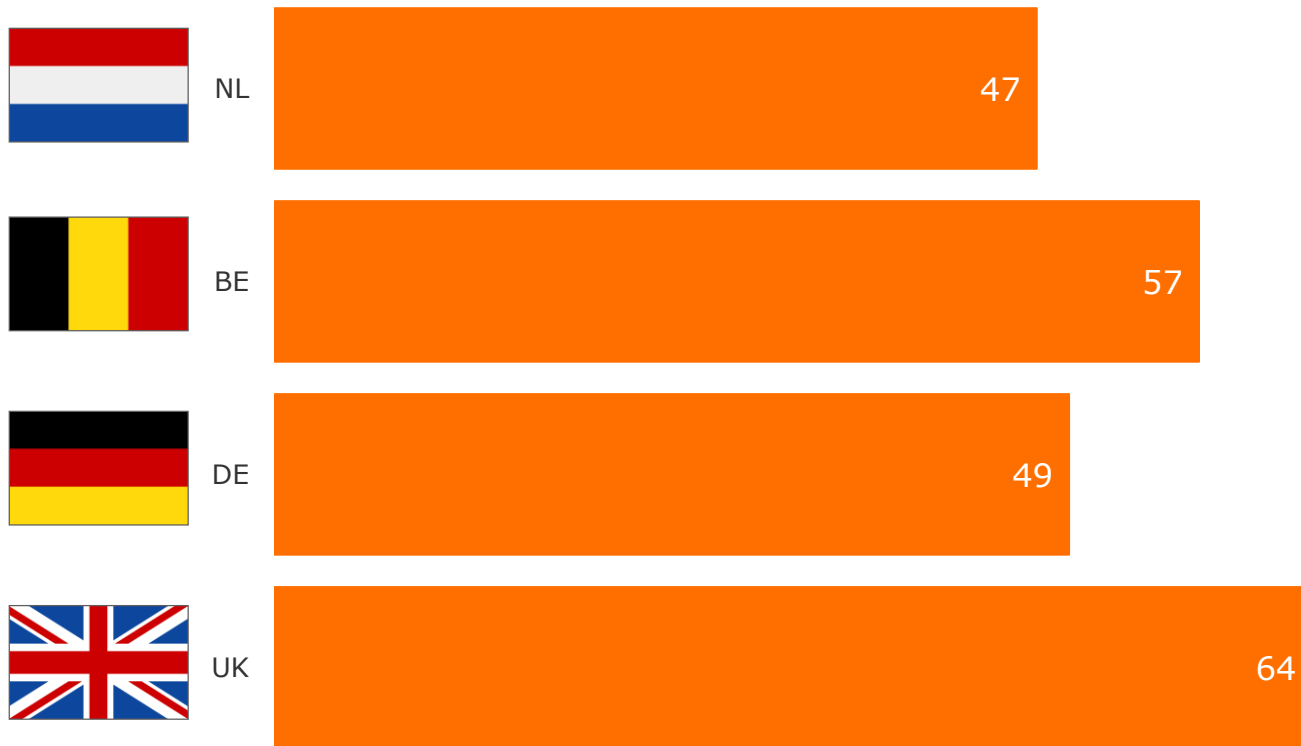
- For the Netherlands travelling by plane, Spain continues to be the most popular holiday destination by far.
- Greece is also fairly popular, although considerably less so than Spain.

Based on:
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?

Influence of corona in the event of no holiday plans (1/2)

The coronavirus outbreak still has a considerable influence on the decision whether or not to go on holiday. This mainly applies to Brits and Belgians, among whom approximately six out of ten who are not going on holiday indicated that the coronavirus pandemic has had a major impact on the decision not to go on holiday this year.



Based on:
People without holiday plans

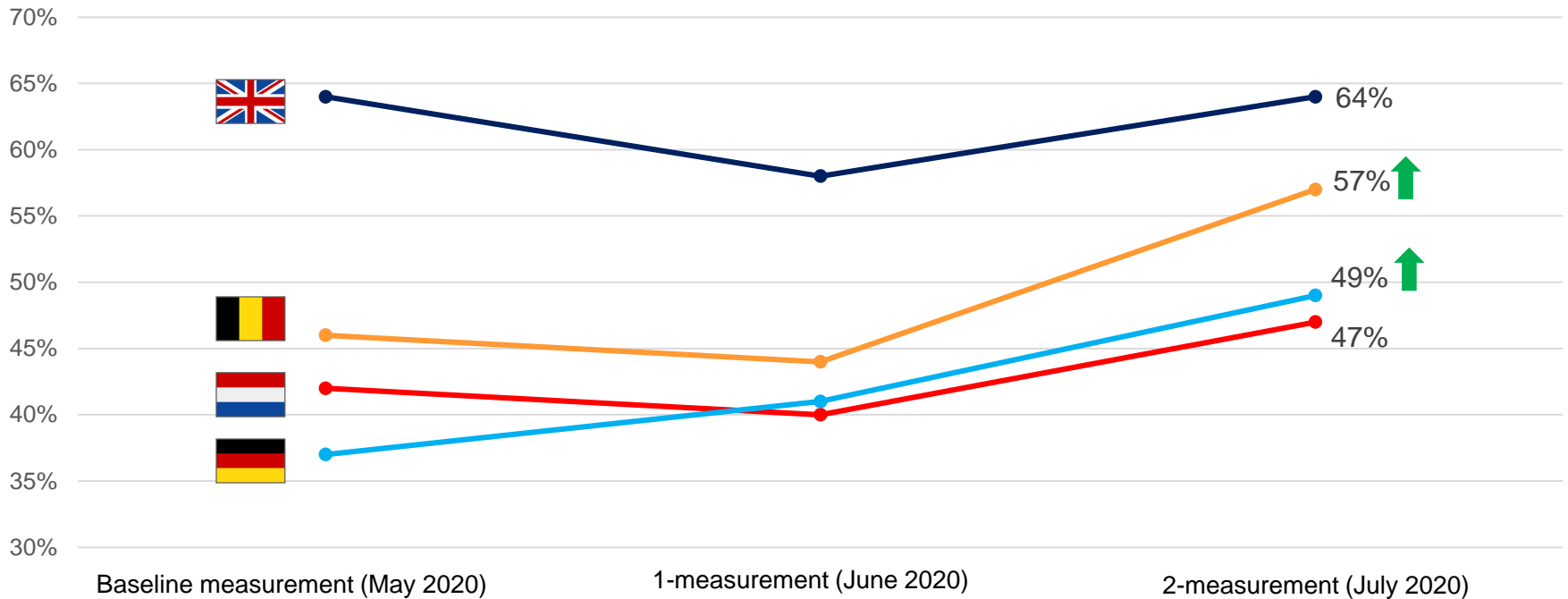
Question:
To what extent does the current coronavirus/COVID-19 pandemic affect the fact that you have no holiday plans at all at the moment?

Influence of corona in the event of no holiday plans (2/2)

The influence of the corona outbreak in the decision whether or not to go on holiday increases this measurement.

In Belgium and Germany in particular, the decision not to go on holiday this year is influenced more and more by the coronavirus outbreak.

Development influence of coronavirus on lack of holiday plans



Based on:
People without holiday plans

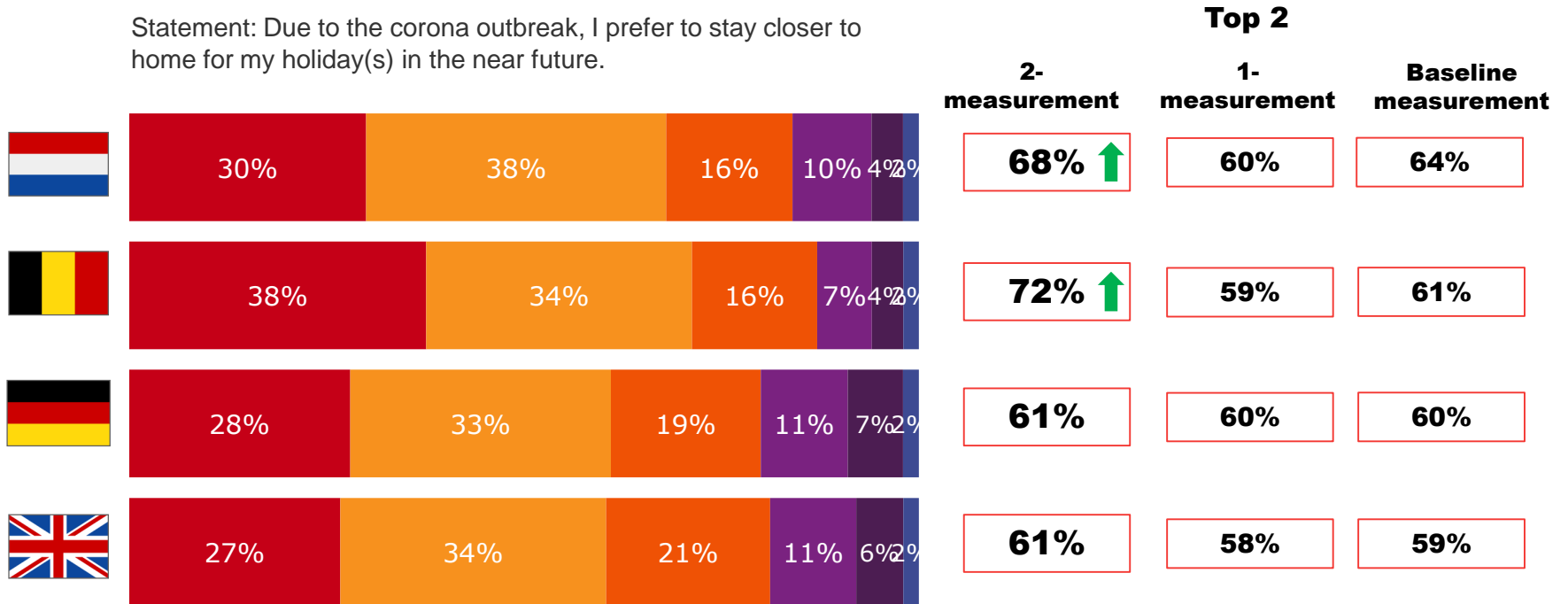
Question:
To what extent does the current coronavirus/COVID-19 pandemic affect the fact that you have no holiday plans at all at the moment?

↑ Significant increase

Statement: A holiday closer to home

In the Netherlands and Belgium a strong increase can be observed in the number of people who prefer to go on holiday closer to home due to the coronavirus 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

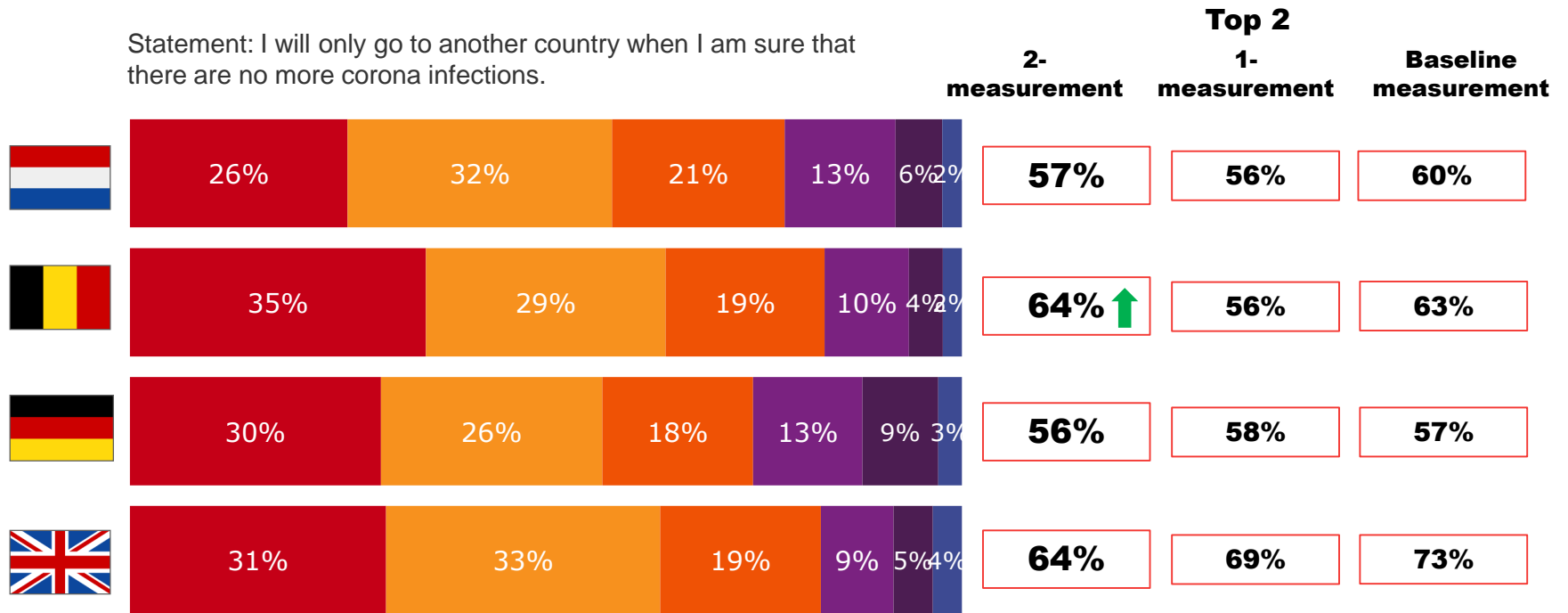
Based on:
total sample

↑ Significant increase

Statement: Travel when there are no infections

Germans have become more cautious about their choice of holiday destination: almost two-thirds say they have no intention of travelling abroad until they can be sure that there are no new infections.

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

Based on:
total sample

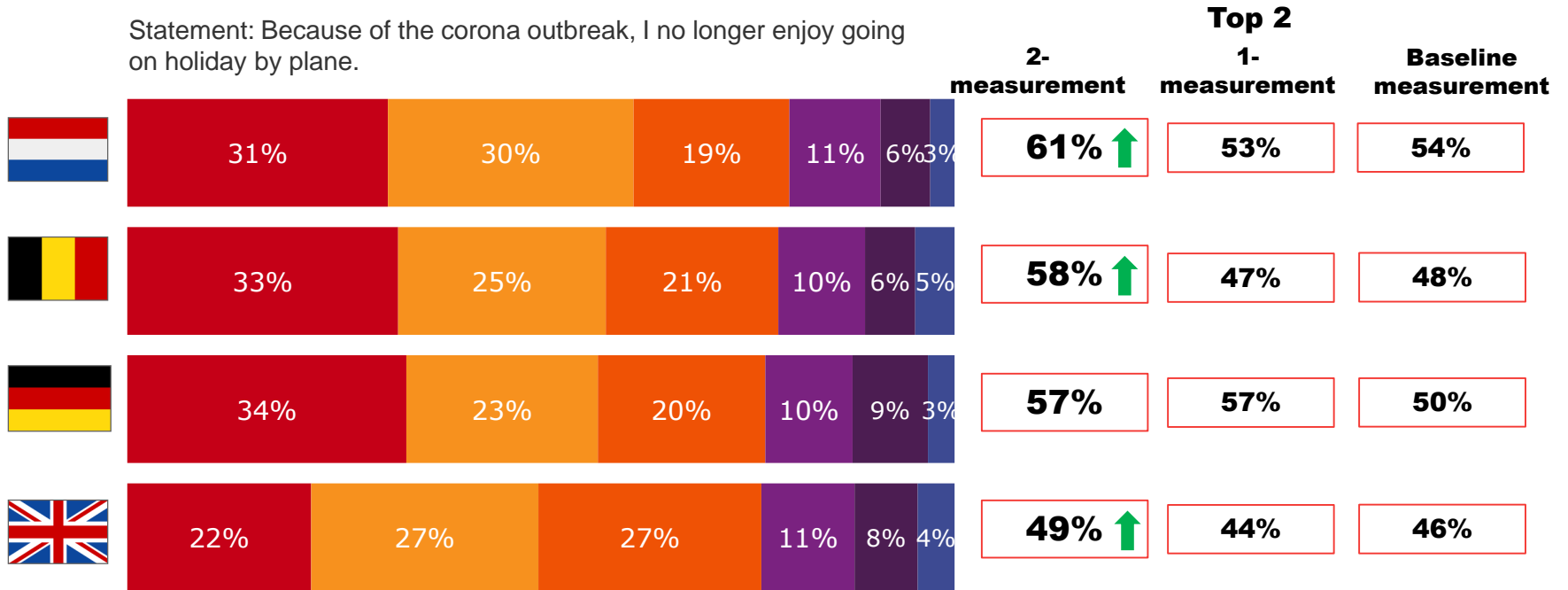
↑ Significant increase

Statement: Popularity of flying

Although people are not less likely to opt for a holiday by plane, the feeling is different for going on holiday by plane.

The Dutch, Brits and Belgians express in this measurement an even stronger hesitation for this type of holiday.

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

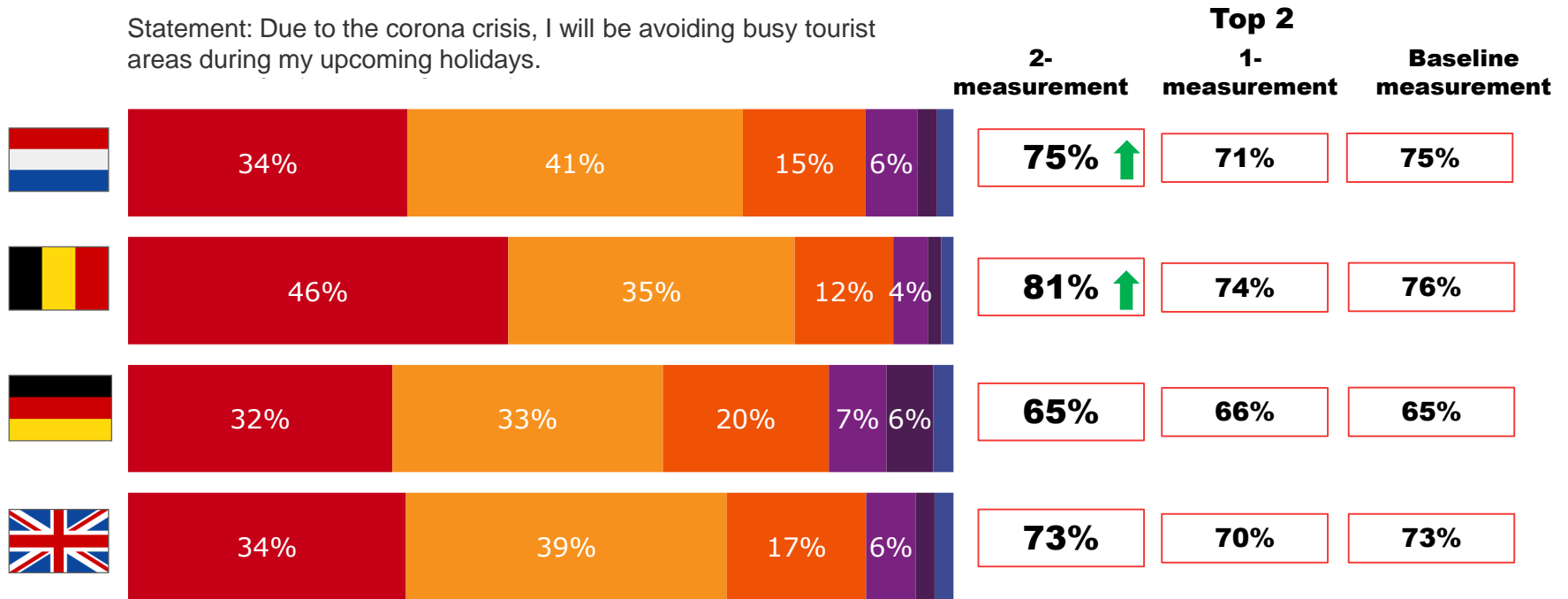
Based on:
total sample

↑ Significant increase

Statement: Busy tourist areas

Both Dutch and Belgian holidaymakers have indicated that they would prefer to avoid busy tourist areas during their holidays.

Statement: Due to the corona crisis, I will be avoiding busy tourist areas during my upcoming holidays.



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

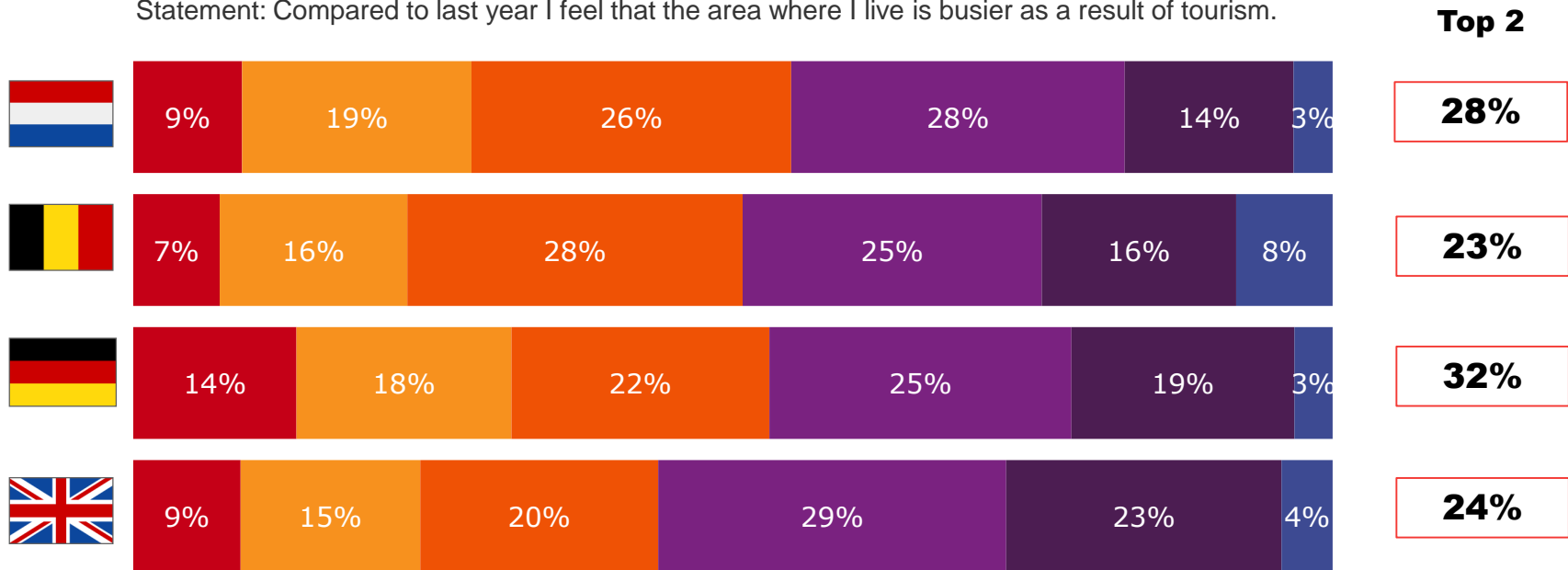
Based on:
total sample

↑ Significant increase

Statement: Crowded areas due to tourism

Roughly one in three Dutch people and Germans have indicated that they have noticed more crowded areas near where they live as a result of tourism, compared to last year. In Belgium and Great Britain this is slightly less; there, roughly a quarter of locals say they see an increase in tourists in their area.

Statement: Compared to last year I feel that the area where I live is busier as a result of tourism.



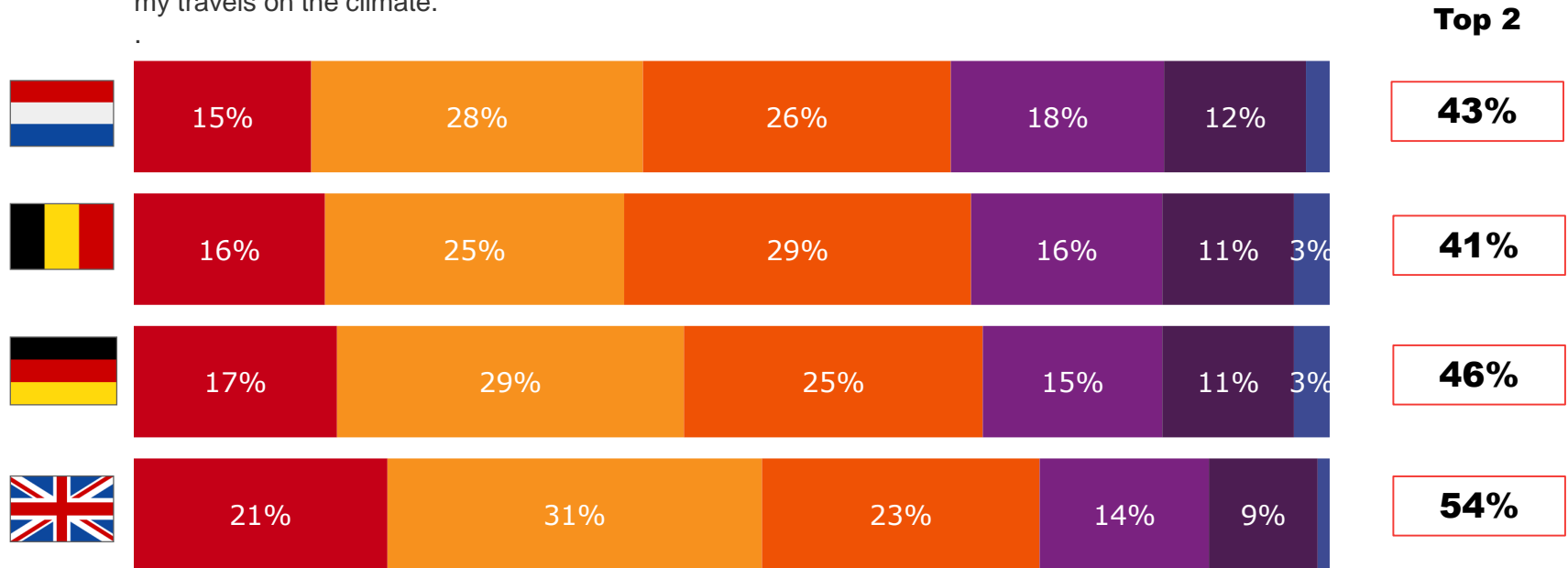
■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Based on:
total sample

Statement: Sustainability

More than half of all Brits has indicated that due to the coronavirus outbreak, they are thinking more about the impact of their travel behaviour on the climate. In other countries this applies to four out of ten people.

Statement: The coronavirus outbreak has made me more conscious of the impact of my travels on the climate.



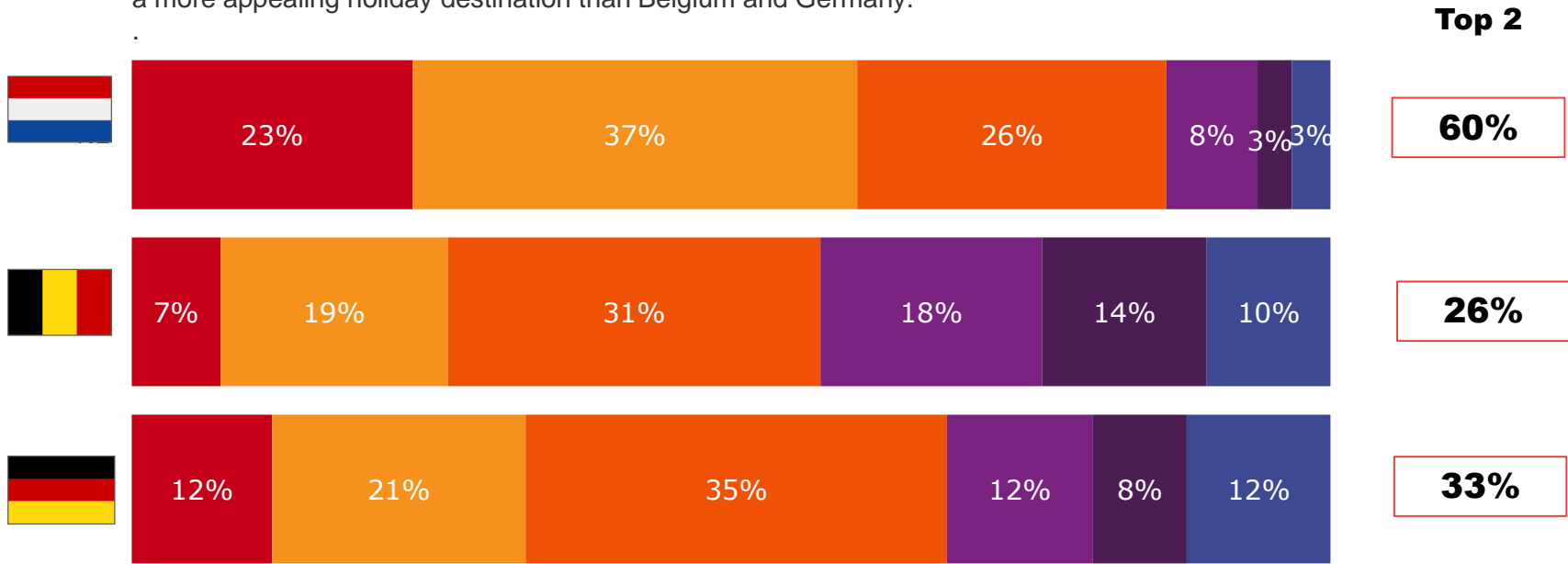
Legend: ■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Do not know

Based on:
total sample

Statement: Appeal of the Netherlands as holiday destination

Six out of ten Dutch people indicate that, considering the measures currently in place, they find the Netherlands a more appealing holiday destination than Belgium or Germany. However, one-third of German holidaymakers also find the Netherlands a more appealing holiday destination at this time.

Statement: The coronavirus measures vary per country. The current measures make the Netherlands a more appealing holiday destination than Belgium and Germany.



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

Based on:
total sample




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Group



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