

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

# Corona Sentiment Monitor Holiday Plans

**Fourth measurement**

**September 2020**



NBTC  
Holland Marketing

  
**Schiphol**  
Group

# Research design

- In cooperation 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  
**3-measurement:** NL / BE / DE / FR / UK / USA / China
- **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  
**3-measurement:** September 7 to September 18, 2020

## More information

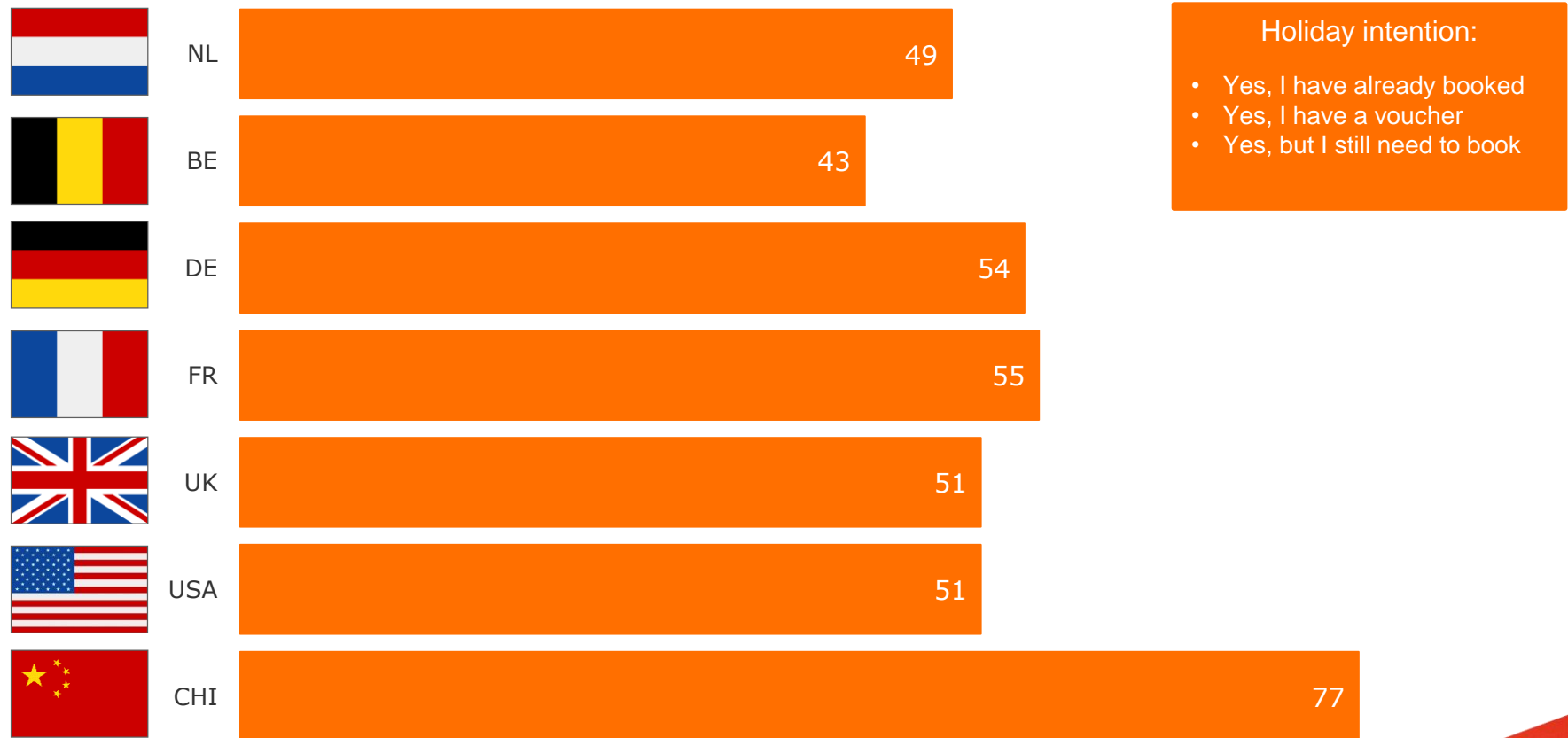
- **Customer Insights:** Hans Martens - [martens\\_j@schiphol.nl](mailto:martens_j@schiphol.nl) / Jenneke Smit-Banting - [banting\\_j@schiphol.nl](mailto:banting_j@schiphol.nl)
- **Aviation Marketing, Cargo en Customer Experience:** Maaïke van der Windt - [Maaïke.van.der.Windt@schiphol.nl](mailto:Maaïke.van.der.Windt@schiphol.nl)

# Holiday intention 2020 (1/3)

In almost all countries, roughly half of all respondents have the intention to go on holiday in the last four months of 2020.

The holiday intention in Belgium, just like in the previous measurement, is slightly below other European countries.

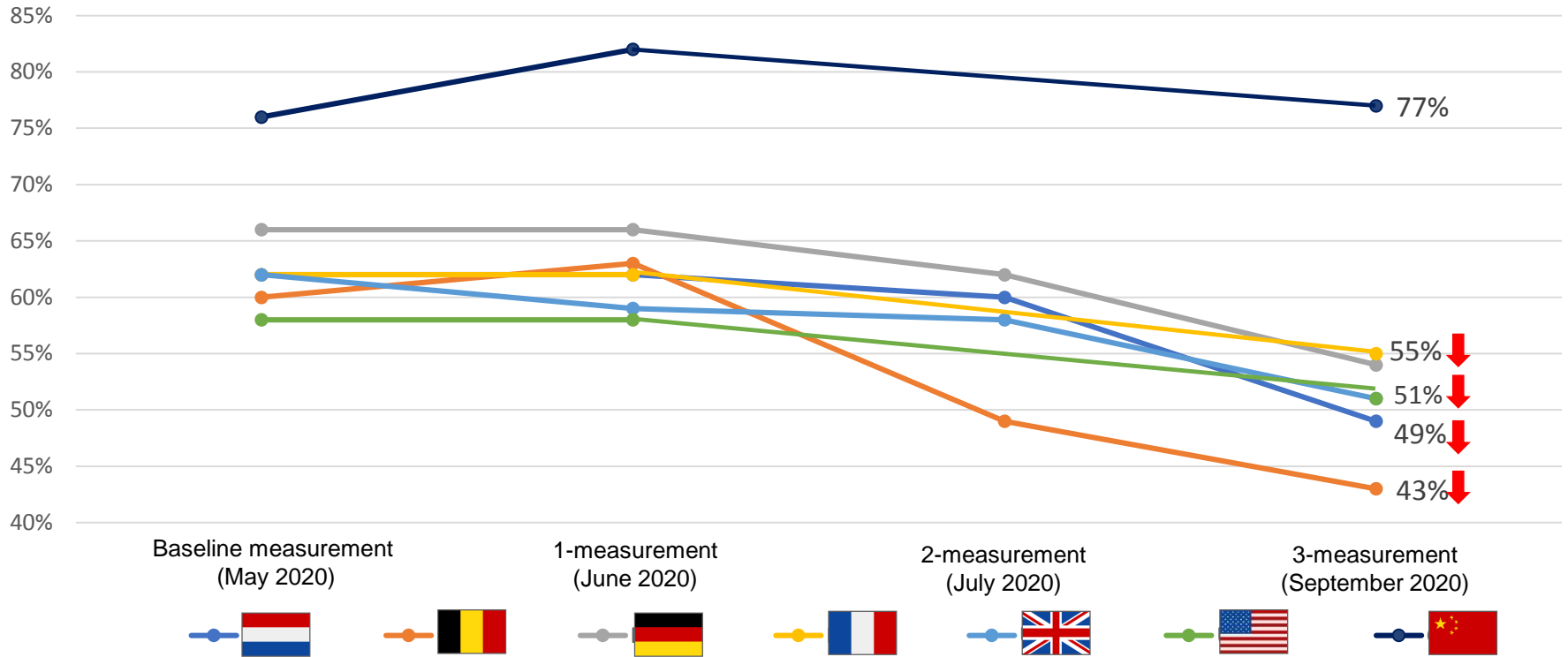
In China, many people tend to book holidays for the last quarter of the year. Combined with the fact that China appears to have the virus under control, a relatively high intention can be observed there.



# Holiday intention 2020 (2/3)

Overall, the holiday intention in all countries with the exception of China shows a downward trend. One of the factors affecting this trend is the end of the summer holidays. Belgium continues to have the lowest score, but the significant decline (-11%) in the Netherlands is particularly striking.

Development of Holiday intention:



Based on:  
total sample

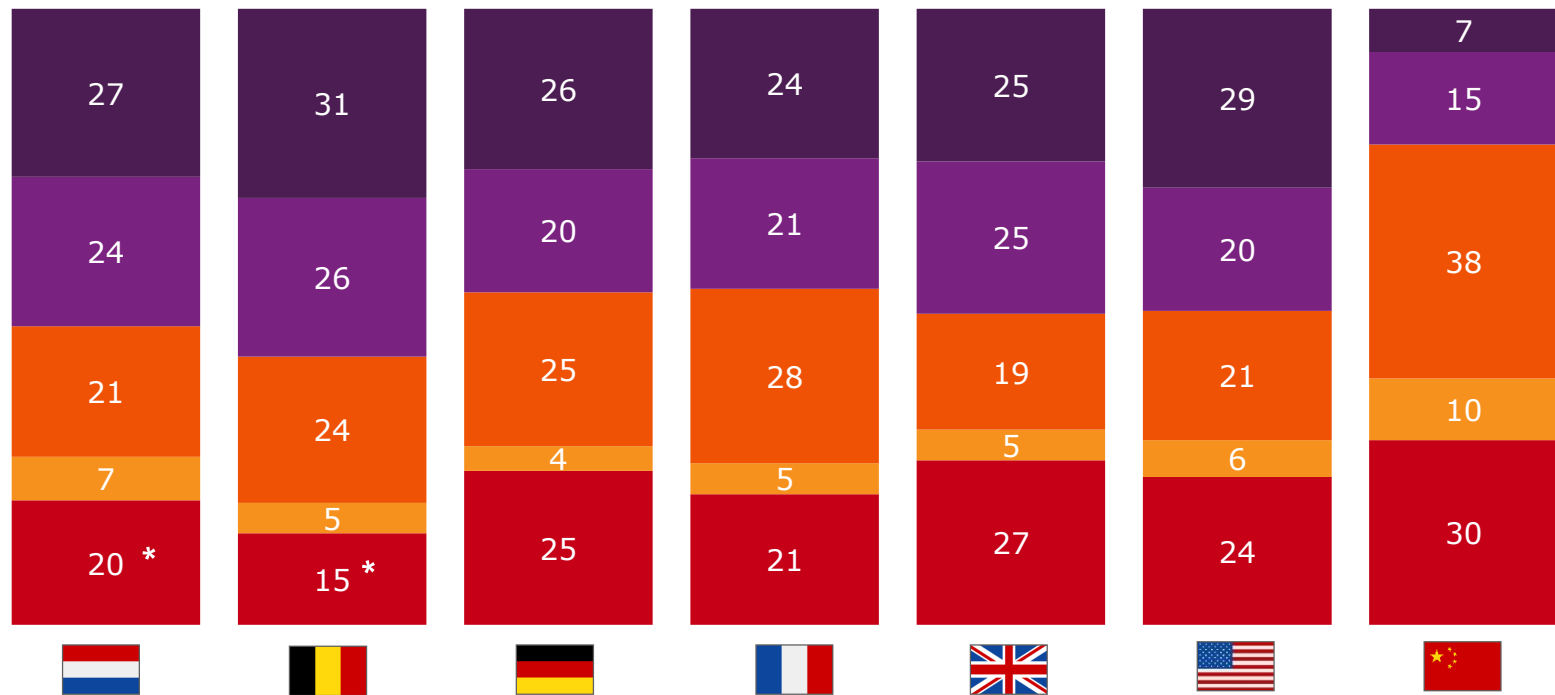
Question:  
Do you currently intend to go on holiday sometime this year (in 2020)?

↓ 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 that a quarter of the people with the intention to go on holiday have already booked their trips. The Netherlands (-12%) and Belgium (-7%) in particular show a significant decline in the number of holidays already booked. Over a quarter of the respondents do have plans to go on holiday, but they have not yet booked their holidays. China is the exception, where this group is very large and there still appears to be plenty of potential.



■ Yes, already booked

■ Yes, voucher

■ Yes, still have to book

■ No, next year

■ No, no plans at all

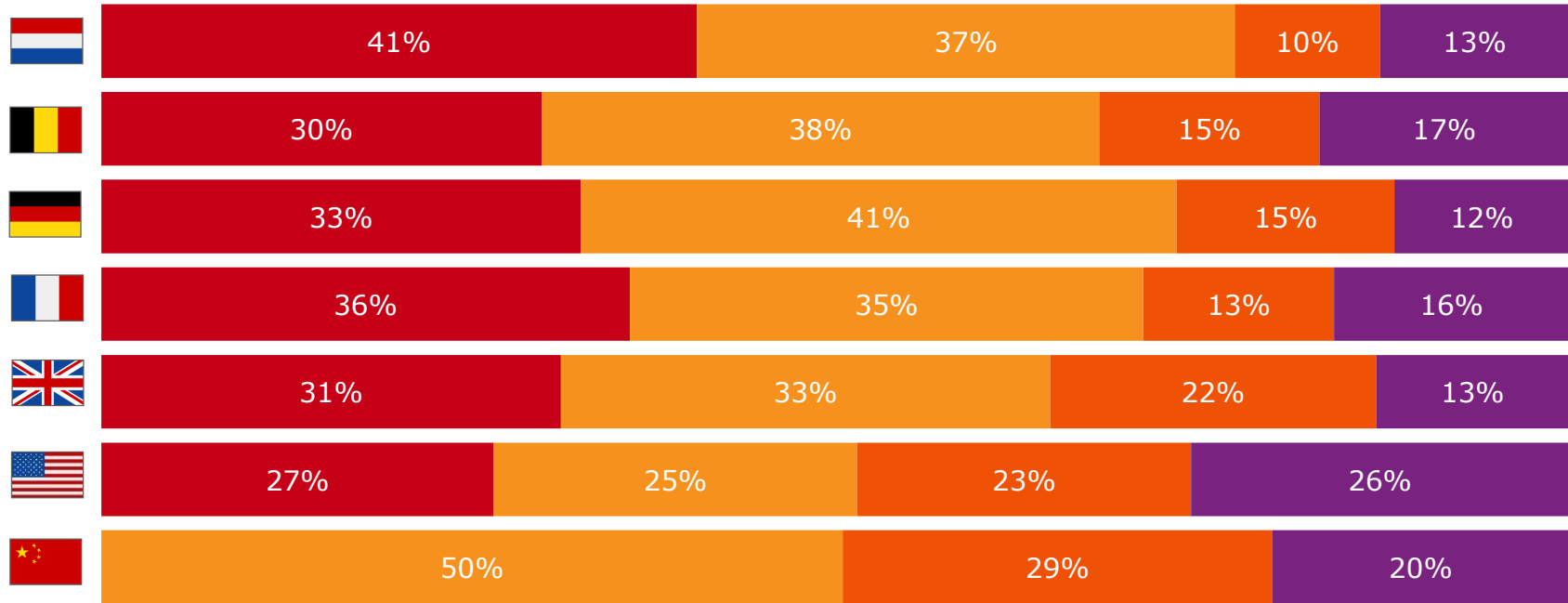
Based on:  
Total sample

\*: 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 September and October. In China, the month of October is the most important holiday month by far.



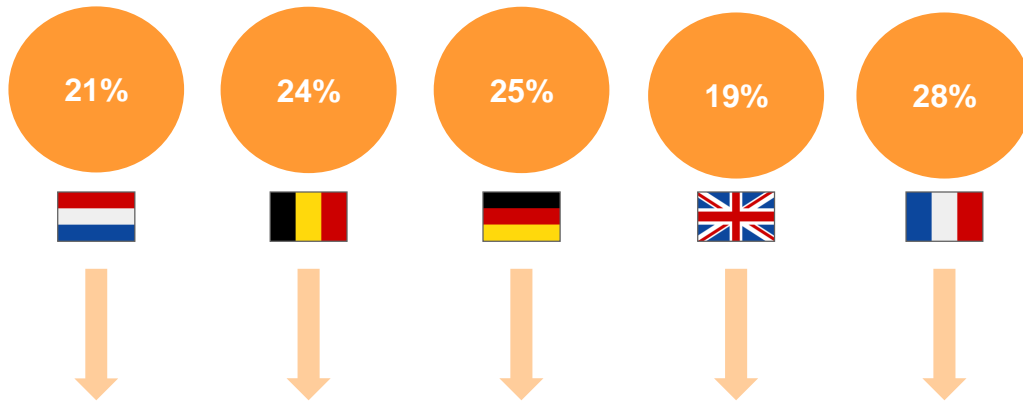
Based on:  
People who have already booked a holiday in 2020

Question:  
In which month are leaving for this holiday?

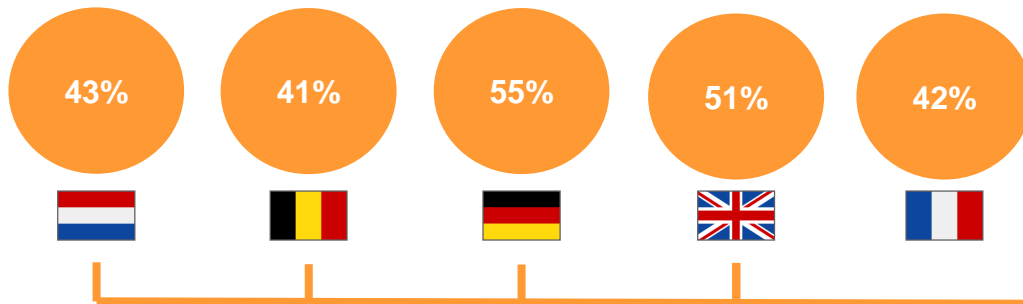
# Potential holidays (1/2)

Around a quarter of people in European countries do have the intention to go on holiday but they still need to book. Of this group, almost half have indicated that they are already looking for a holiday. For this group, the month of October is the most important month of departure. For Dutch people, French people and Belgians, December is also a popular month of departure.

## Holiday intention but still need to book



## Looking for holiday destinations

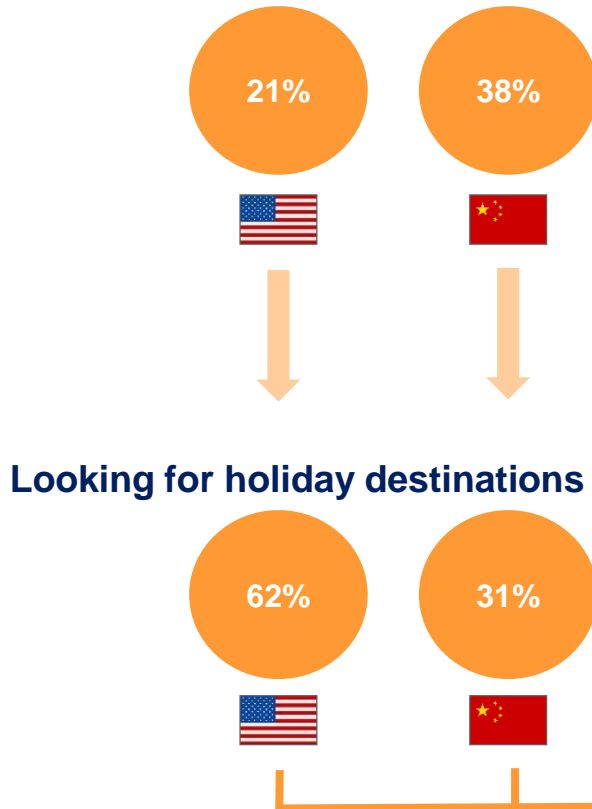




<b>Month of departure:</b>					
September	12%	7%	7%	6%	7%
October	33%	22%	29%	29%	29%
November	9%	12%	23%	27%	15%
December	25%	16%	23%	11%	24%
Other / don't know	21%	44%	19%	26%	25%
<b>Sample</b>	<b>N=93</b>	<b>N=97</b>	<b>N=128</b>	<b>N=97</b>	<b>N=117</b>

# Potential holidays (2/2)

Almost two-fifths of people in China have indicated that they do have the intention to go on holiday but they still need to book. Of this group only one third is actively looking for holiday destinations. It would appear that only a small proportion of the above-mentioned potential will be achieved. The situation in the United States is the polar opposite. The share of people there who still need to book a holiday is one in five, while the number of people already looking for destinations is twice as big as in China.

## Holiday intention but still need to book

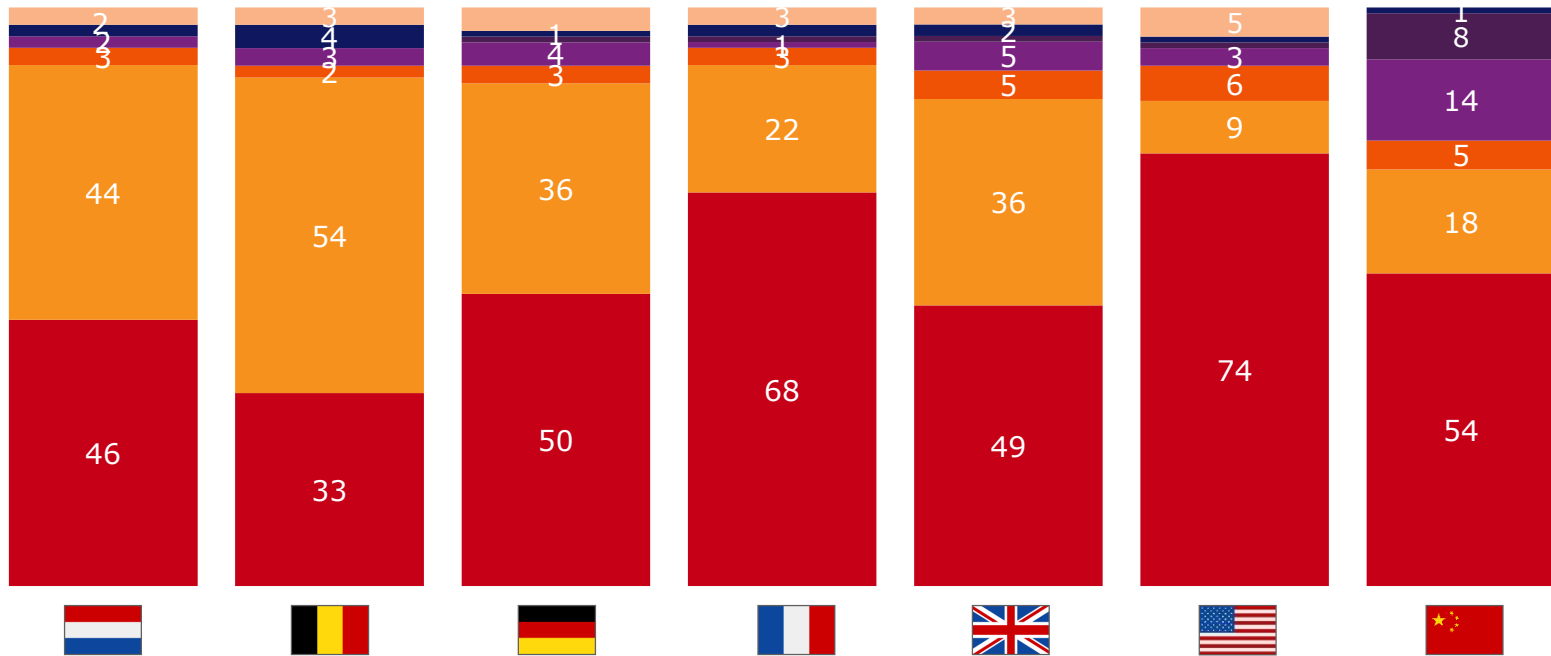


		
<b>Month of departure:</b>		
September	2%	0%
October	13%	17%
November	29%	17%
December	29%	31%
Other / don't know	28%	35%
<b>Sample</b>	<b>N=131</b>	<b>N=29*</b>



# Regio/continent

In most countries, approximately half of the respondents have indicated that they plan to stay in their home country. In France this number is even higher (over two thirds). The situation in the United States, combined with the end of the summer period, has resulted in the decision of almost three quarters of the respondents to stay in their home country.



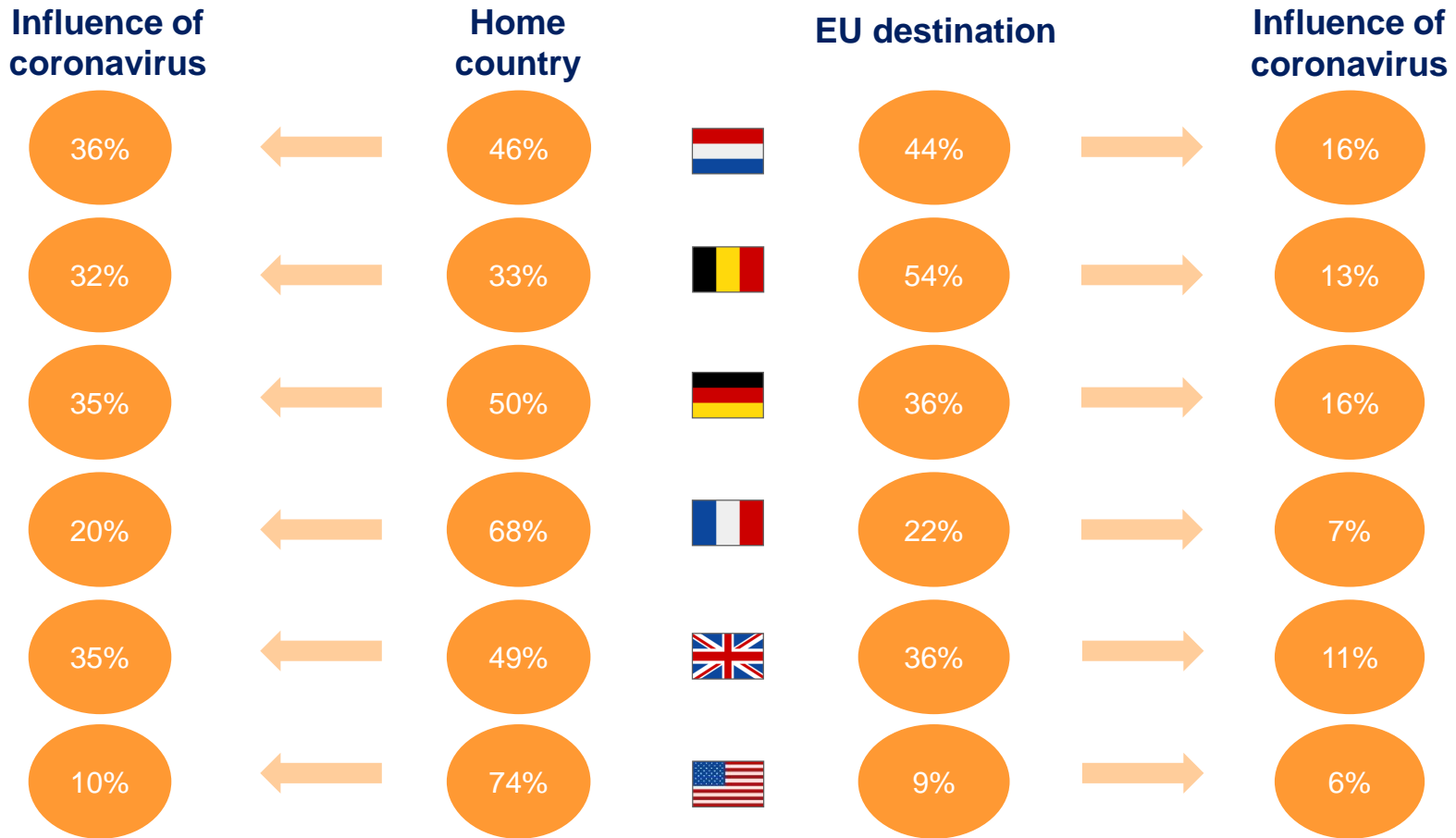
■ Own country  
 ■ Europe  
 ■ North-America/South-America  
 ■ Asia  
 ■ Australia/Oceania  
 ■ Africa  
 ■ Not sure yet

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

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

# Influence of coronavirus on choice of holiday destination

In most European countries, one third of the respondents has indicated that the decision to stay in their own country is based on the coronavirus outbreak. In France this is one in five. The choice for a European holiday destination is influenced by the coronavirus outbreak to a much smaller extent.

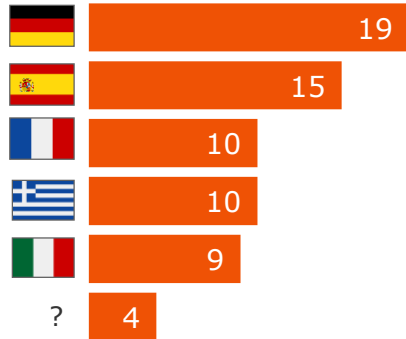


Based on:  
People with holiday plans (booked/voucher/still need to book)

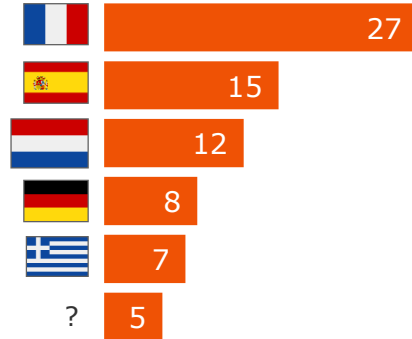
Question:  
Had you planned on spending this holiday in [destination] even before the coronavirus outbreak?

# Top 5 European destinations – The Netherlands becomes more popular

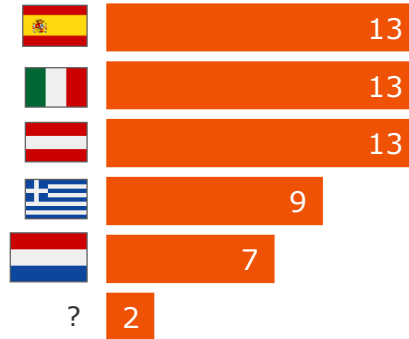
NL



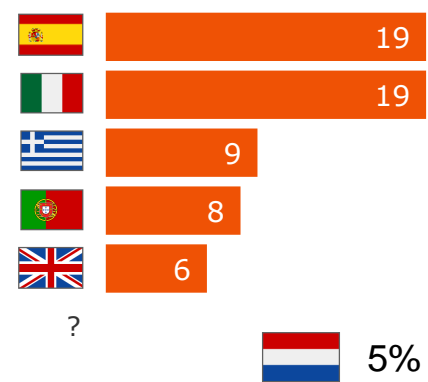
BE



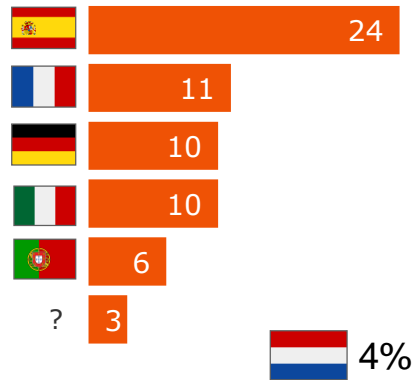
DE



FR



GB

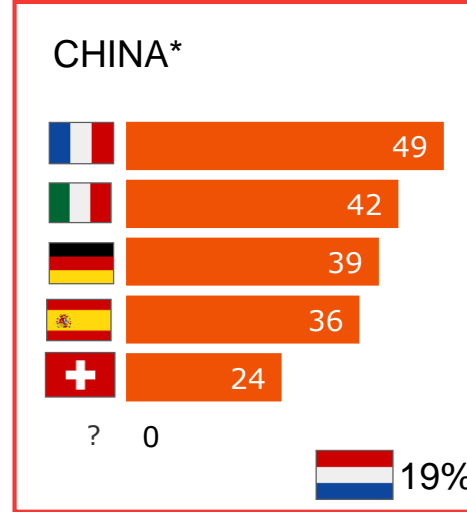
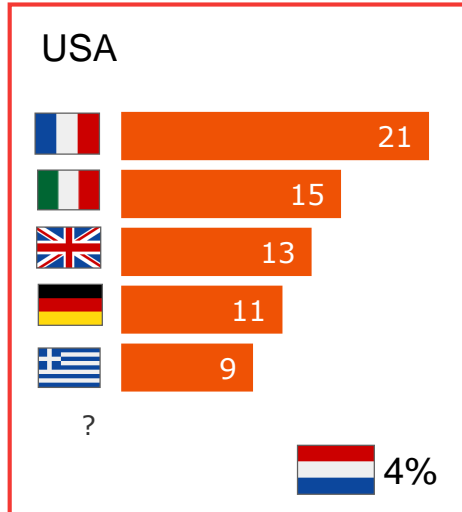


- Spain remains the most popular destination by far even during these times. Due to the current situation, Spain's popularity during this measurement shows a decline among Dutch holidaymakers who now show a clear preference for Germany.
- Other countries with a Mediterranean character such as Greece and Italy remain popular, though considerably less so than Spain.
- Compared to the first measurement, the Netherlands has clearly become more popular among European holidaymakers.

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

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

# Top 5 European destinations



- Two out of five respondents with holiday plans in Europe who live in the United States choose France as their main destination. The Netherlands continues to hold on to a small market share when it comes to being a main destination for a stay in Europe.
- Chinese holidaymakers travelling to Europe tend to have multiple destinations. Almost half of Chinese travelers intending to visit Europe go to France. Almost one in five also visits the Netherlands.

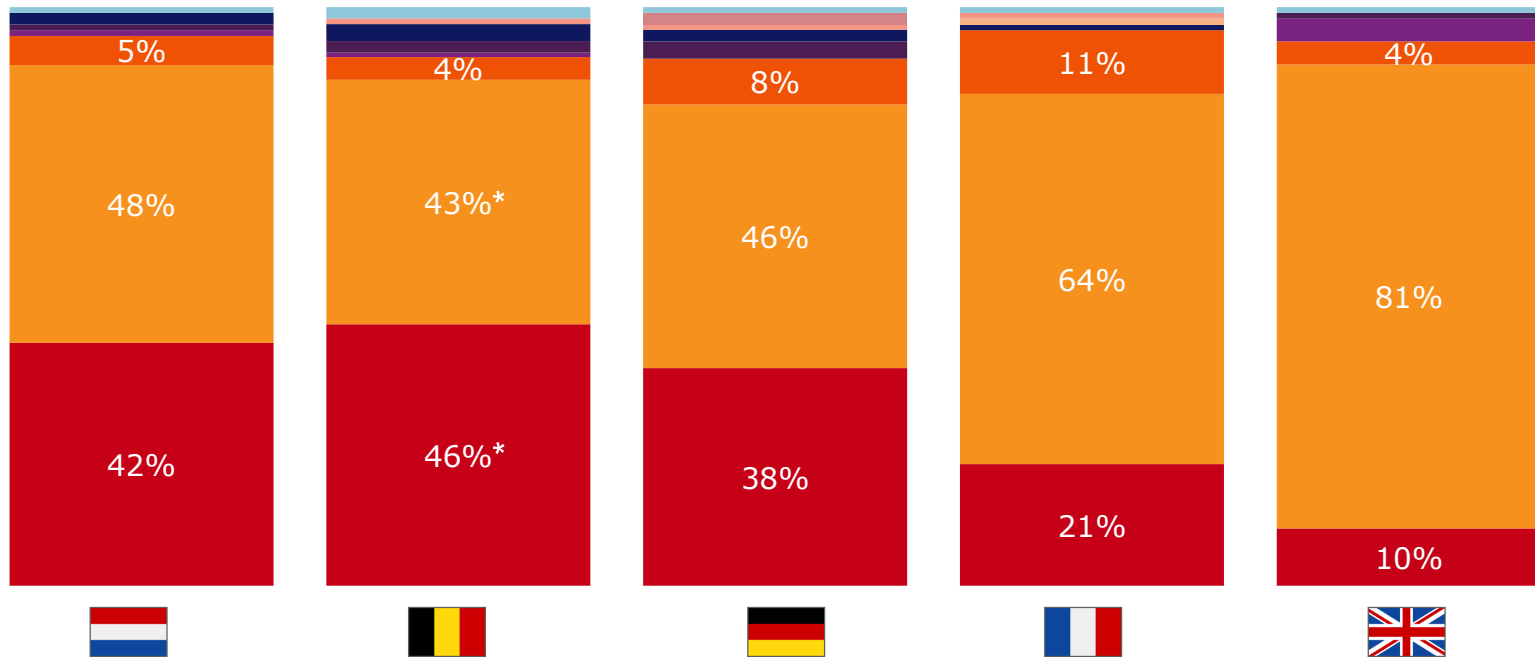
Based on:  
Respondents with holiday plans in a European country.

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

\* Chinese respondents were permitted to indicate multiple countries.

# Mode of transportation for European holiday plans

The plane remains the most popular mode of transportation for people who have holiday plans somewhere in Europe. In Belgium in particular, the popularity of the plane has increased considerably (+9%).



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

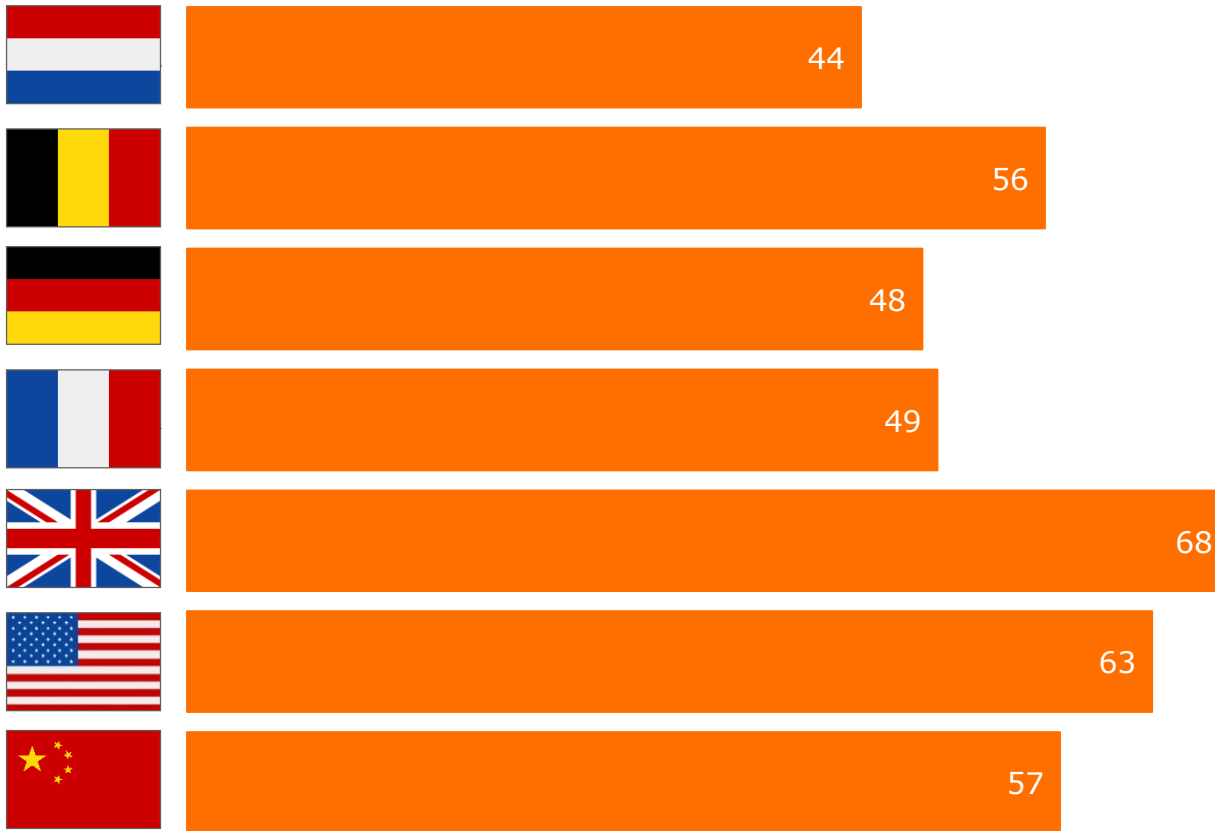
Based on:  
Respondents with holiday plans in a European country.

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

\*: significant difference

# Influence of coronavirus 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 Americans, among whom approximately two out of three have indicated that they will not be going on holiday and that the coronavirus outbreak has played a considerable part in their decision not to go on holiday this year.



Based on:  
People without holiday plans

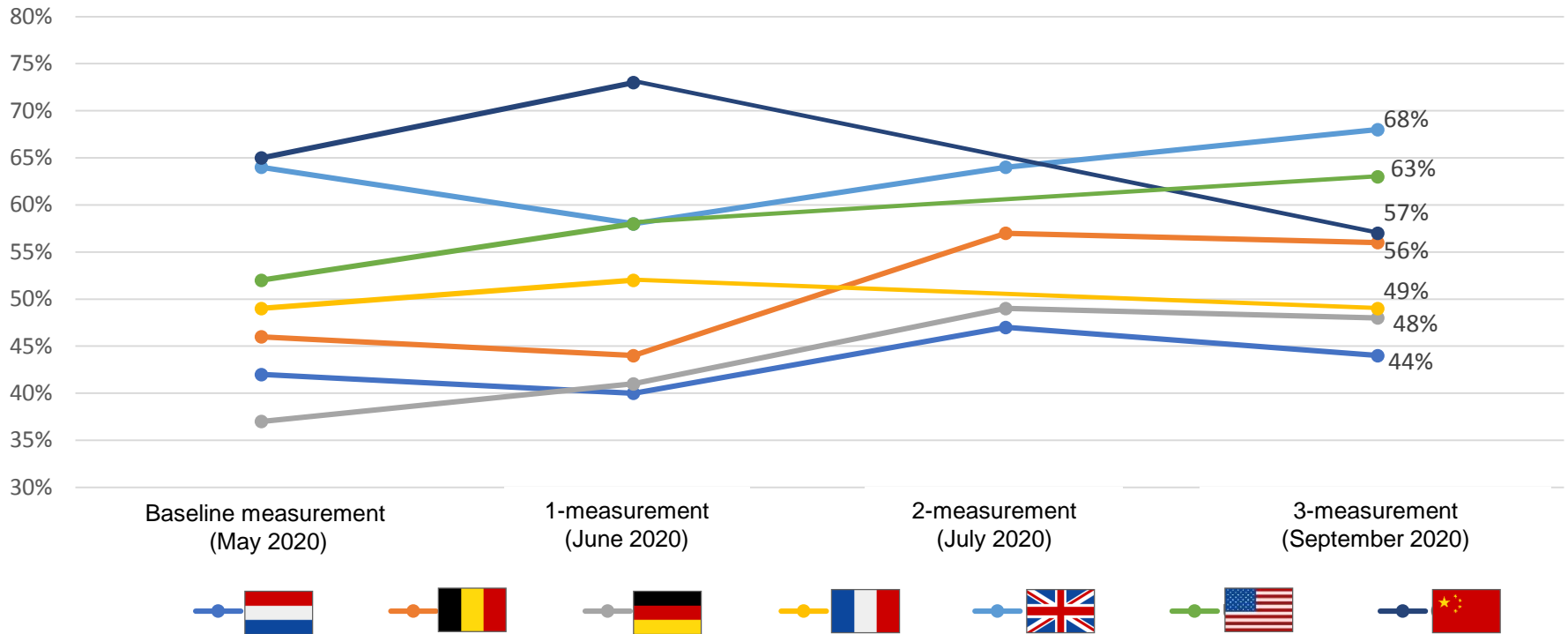
Question:  
To what extent does the current coronavirus/COVID-19 pandemic affect the fact that you have no holiday plans at all at the moment?



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

The influence of the coronavirus outbreak on the decision whether or not to go on holiday has increased during in this measurement for the United Kingdom and the United States. Due to the positive developments in China, the influence of the coronavirus outbreak on the decision not to go on holiday this year continues to decline.

Development of the influence of coronavirus on lack of holiday plans



Based on:  
People without holiday plans

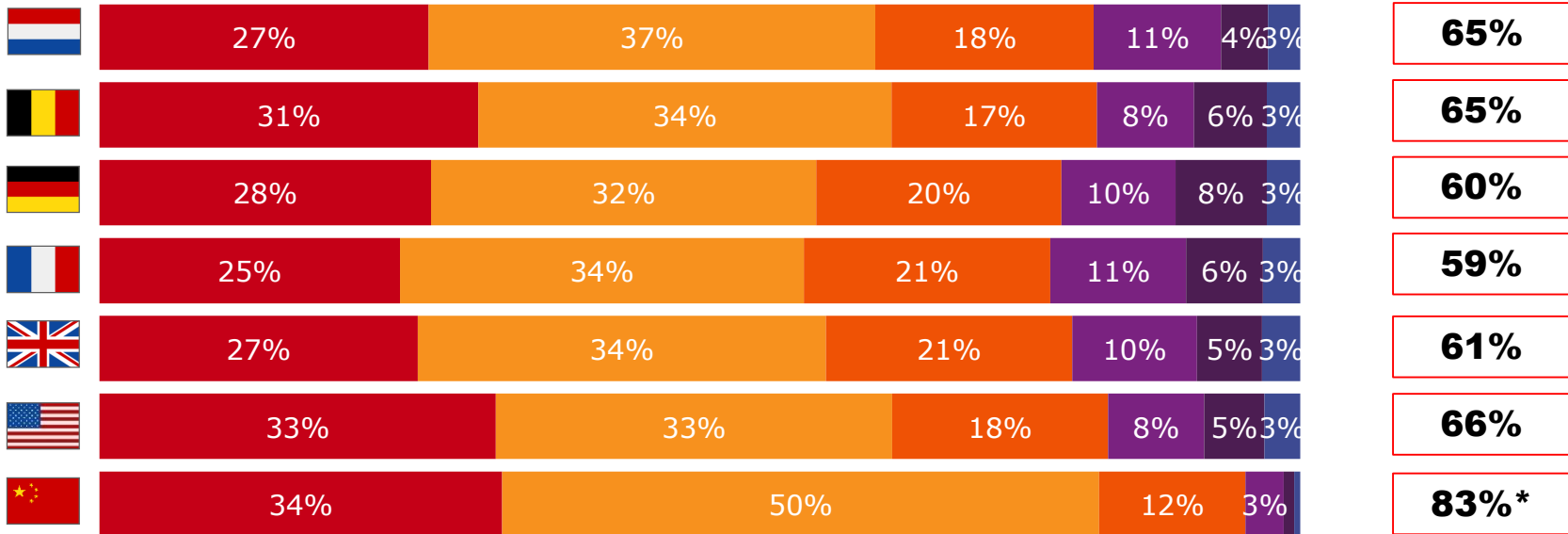
Question:  
To what extent does the current coronavirus/COVID-19 pandemic affect the fact that you have no holiday plans at all at the moment?

# Statement: On holiday closer to home (1/2)

More than four out of five people in China have indicated that they would prefer to spend their holiday in China due to the coronavirus outbreak. In the other countries, over three out of every five people have indicated that they would prefer to spend their holidays closer to home as a result of the coronavirus outbreak

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

**Top 2**



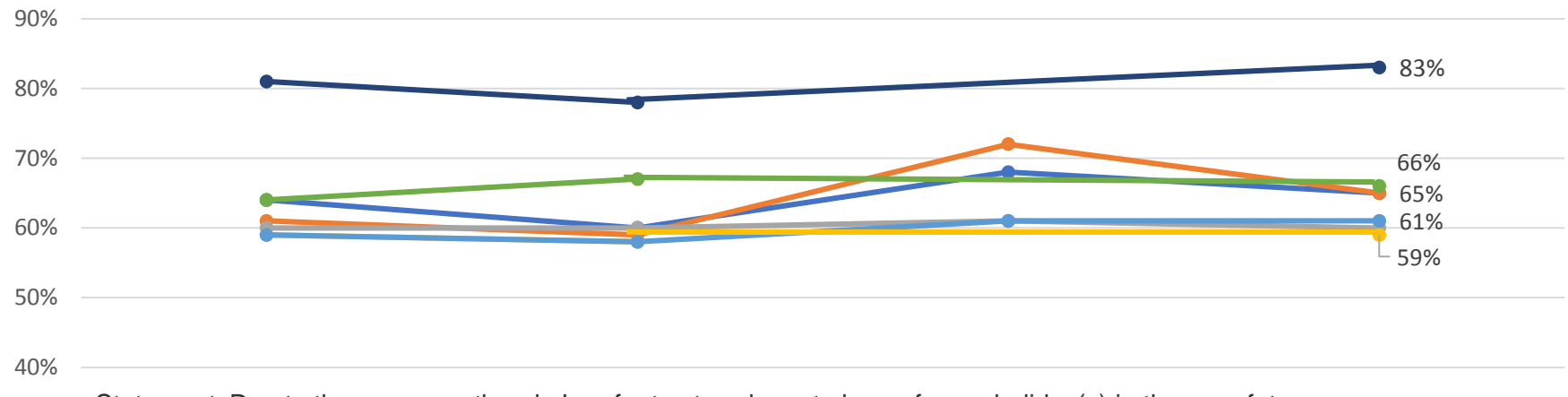
■ Totally agree  
 ■ Agree  
 ■ Do not agree, do not disagree  
 ■ Disagree  
 ■ Totally disagree  
 ■ Do not know

Based on:  
total sample

\* Statement China: Due to the coronavirus 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: On holiday closer to home (2/2)

Since the first measurements, three out of five people in almost all countries have indicated that they prefer to stay closer to home as a result of the coronavirus outbreak. In China this percentage is always considerably higher and we are now also seeing a slight increase. We have previously seen that Belgians have comparably more plans for a holiday to a European destination. Also in this measurement the percentage of Belgians that prefer to stay closer to home have decreased.



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



Based on:  
total sample

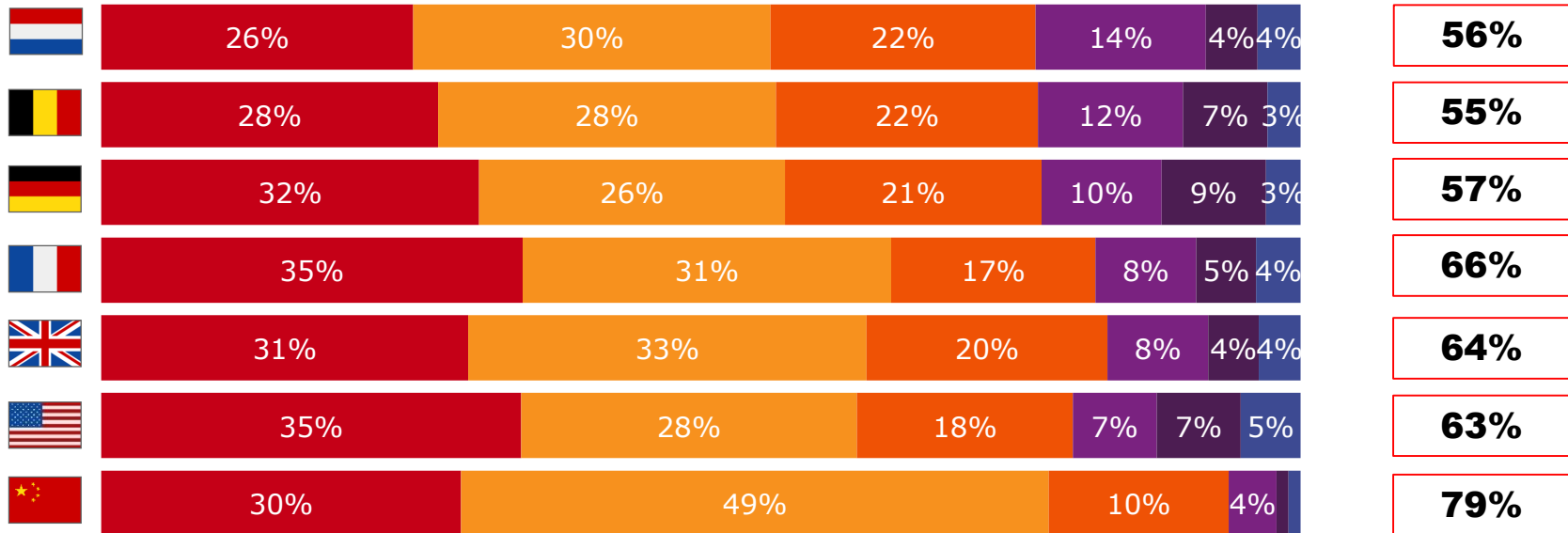
\* Statement China: Due to the coronavirus outbreak, I prefer to stay in China for my holiday (s) in the coming period instead of travelling to a destination outside of China.

# Statement: Travel when there are no infections (1/2)

Approximately six out of ten respondents in all countries have indicated that they will not travel abroad unless they are certain that there are no new coronavirus infections. In China this even applies to eight out of ten people.

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

**Top 2**

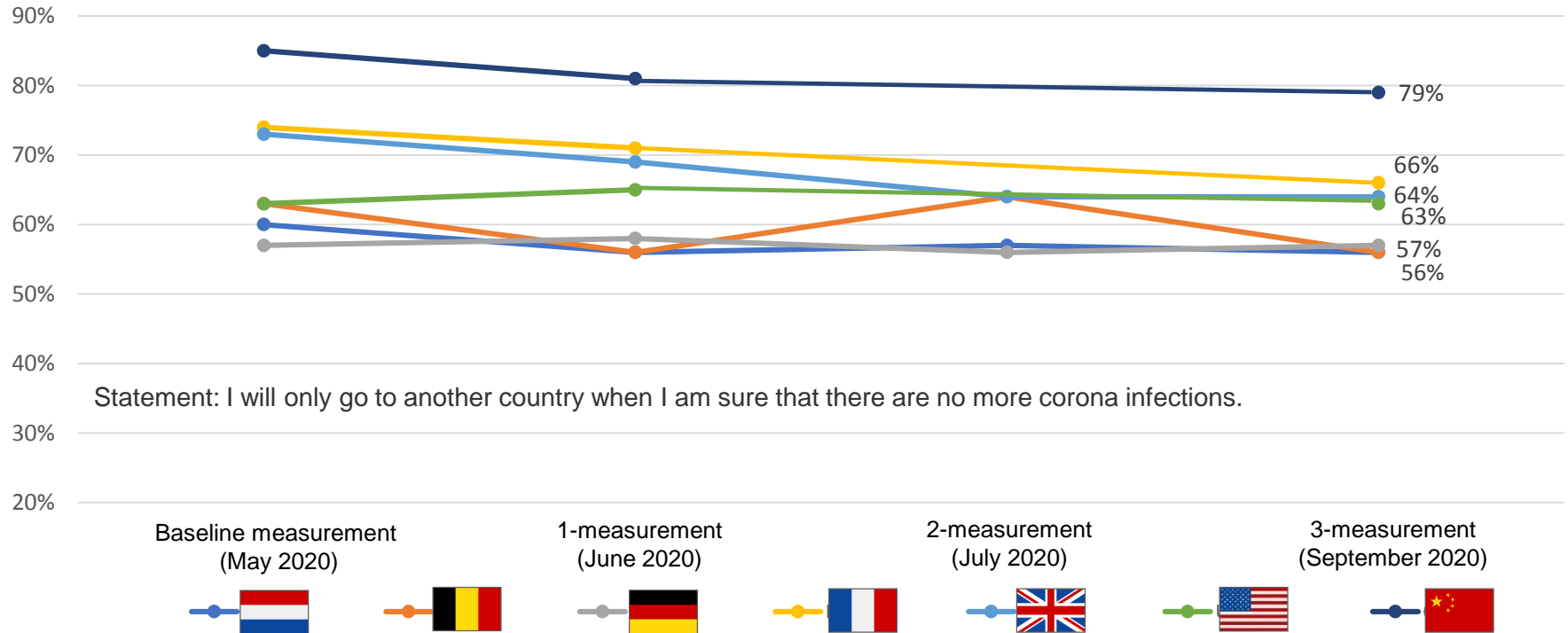


■ Totally agree  
 ■ Agree  
 ■ Do not agree, do not disagree  
 ■ Disagree  
 ■ Totally disagree  
 ■ Do not know

Based on:  
total sample

## Statement: Travel when there are no infections (2/2)

Belgians seem to have become slightly less cautious in their choice of holiday destination. Compared to the previous measurement, where almost two-thirds said they would not consider travelling abroad until they could be sure that there were no new infections, this now applies to just over half.



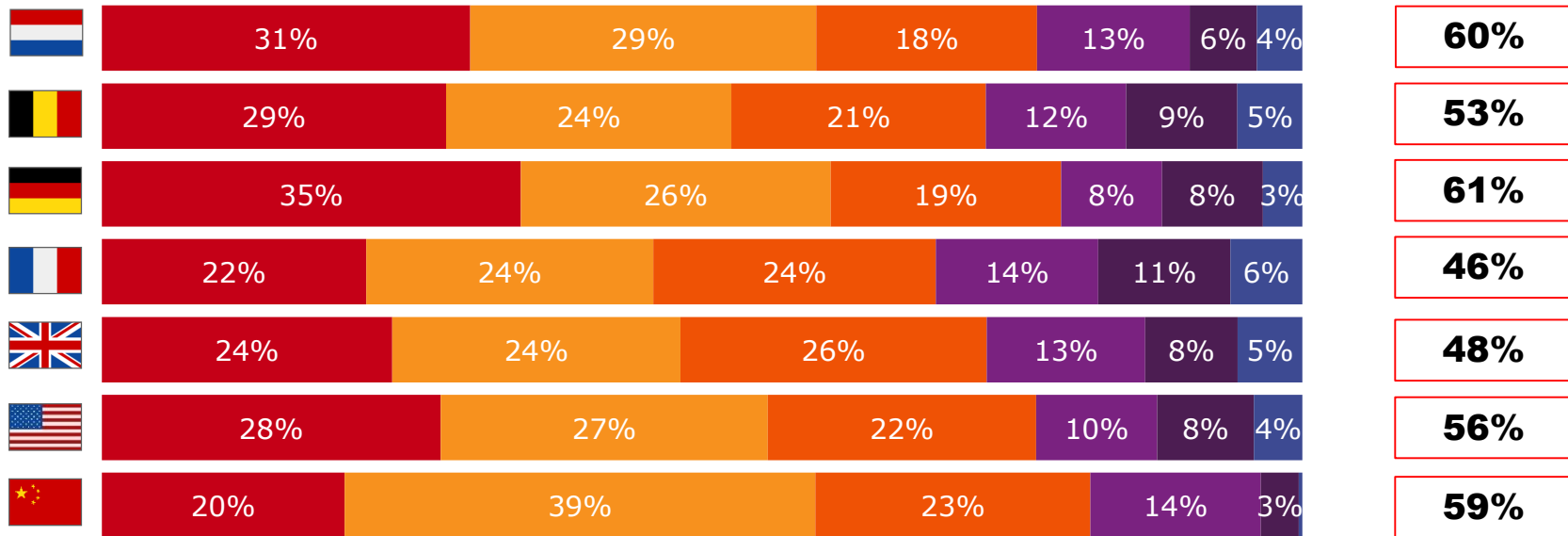
Based on:  
total sample

# Statement: Popularity of air travel (1/2)

Although the plane is the most popular mode of transportation for a holiday, at least half of the respondents have indicated that they feel less comfortable travelling by plane considering the current state of affairs. In the Netherlands, Germany and China this even applies to eight out of ten people.

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

**Top 2**



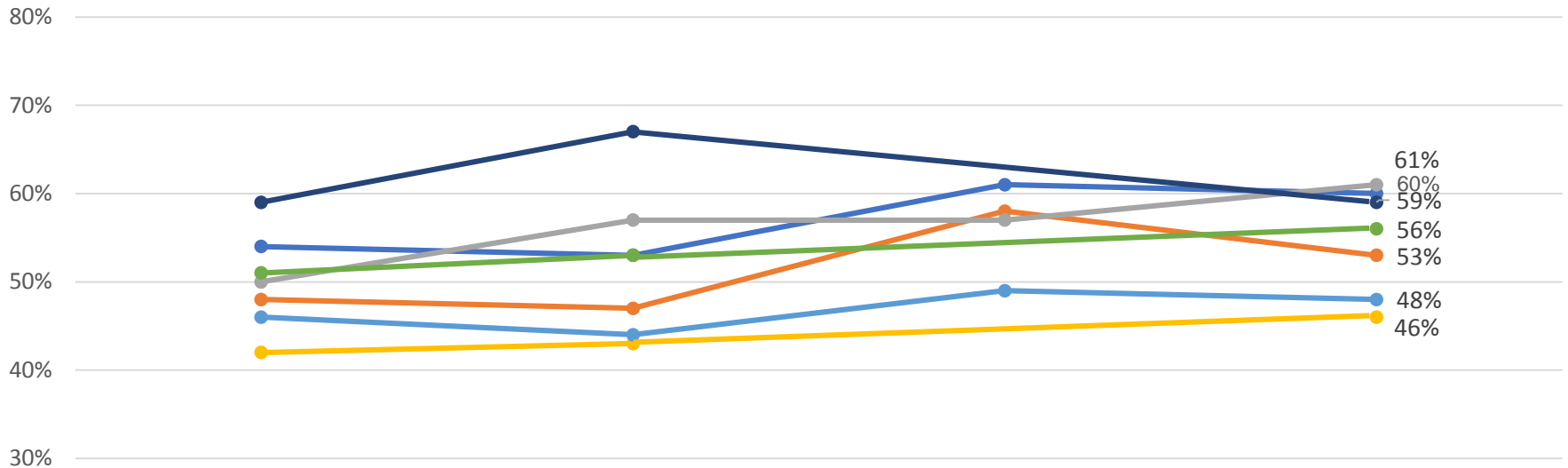
■ Totally agree  
 ■ Agree  
 ■ Do not agree, do not disagree  
 ■ Disagree  
 ■ Totally disagree  
 ■ Do not know

Based on:  
total sample



## Statement: Popularity of air travel (2/2)

In this measurement, Belgians have indicated plans to travel to European destinations more than they plan to stay closer to home, and the popularity of air travel is also on the rise. Belgians' views on travelling by plane are also more positive compared to the previous measurement. Dutch people on the other hand have become more sceptical.



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

Baseline measurement  
(May 2020)



1-measurement  
(June 2020)



2-measurement  
(July 2020)



3-measurement  
(September 2020)



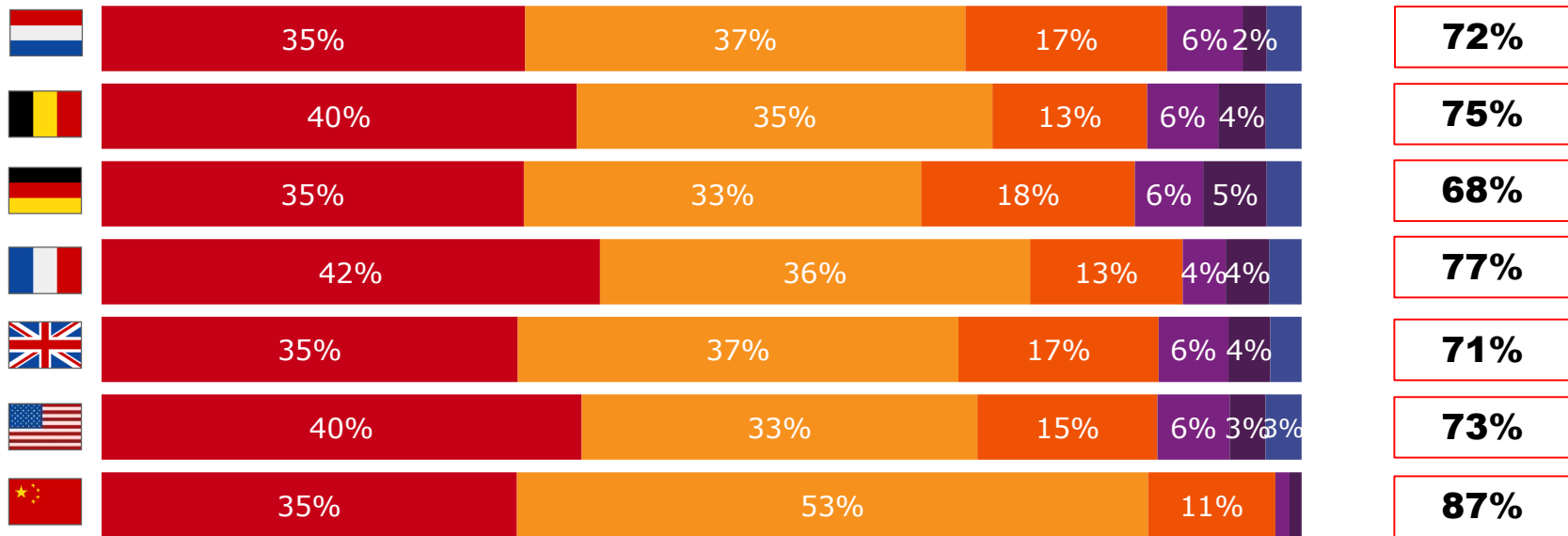
Based on:  
total sample

# Statement: Busy tourist areas (1/2)

Seven out of ten people have indicated that they would prefer to avoid busy tourist areas during their next holiday. This applies even more strongly to the Chinese.

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

**Top 2**

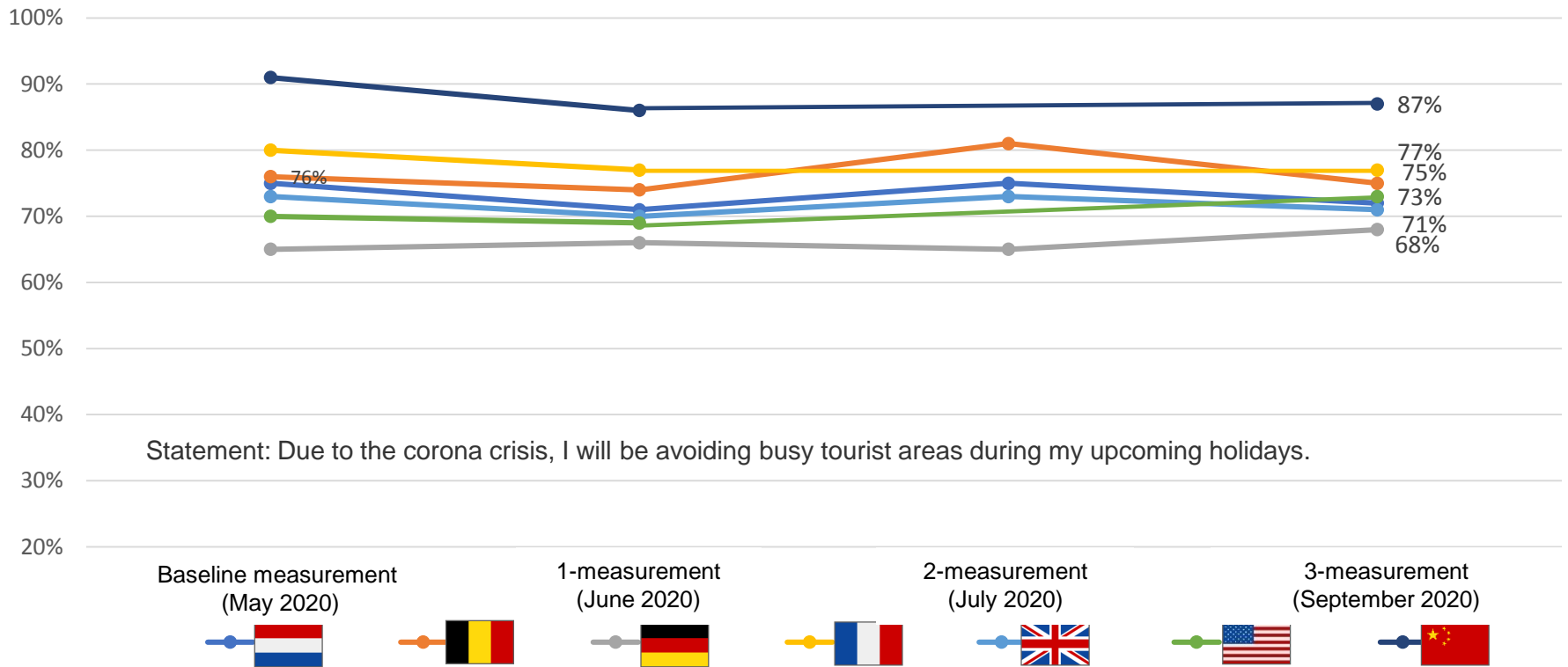


■ Totally agree  
 ■ Agree  
 ■ Do not agree, do not disagree  
 ■ Disagree  
 ■ Totally disagree  
 ■ Do not know

Based on:  
total sample

## Statement: Busy tourist areas (2/2)

The influence of the coronavirus outbreak on the decision to avoid busy tourist areas remains largely the same in this measurement. In Germany the influence of the coronavirus outbreak appears to be increasing, whereas in Belgium a decline can be observed in this measurement.



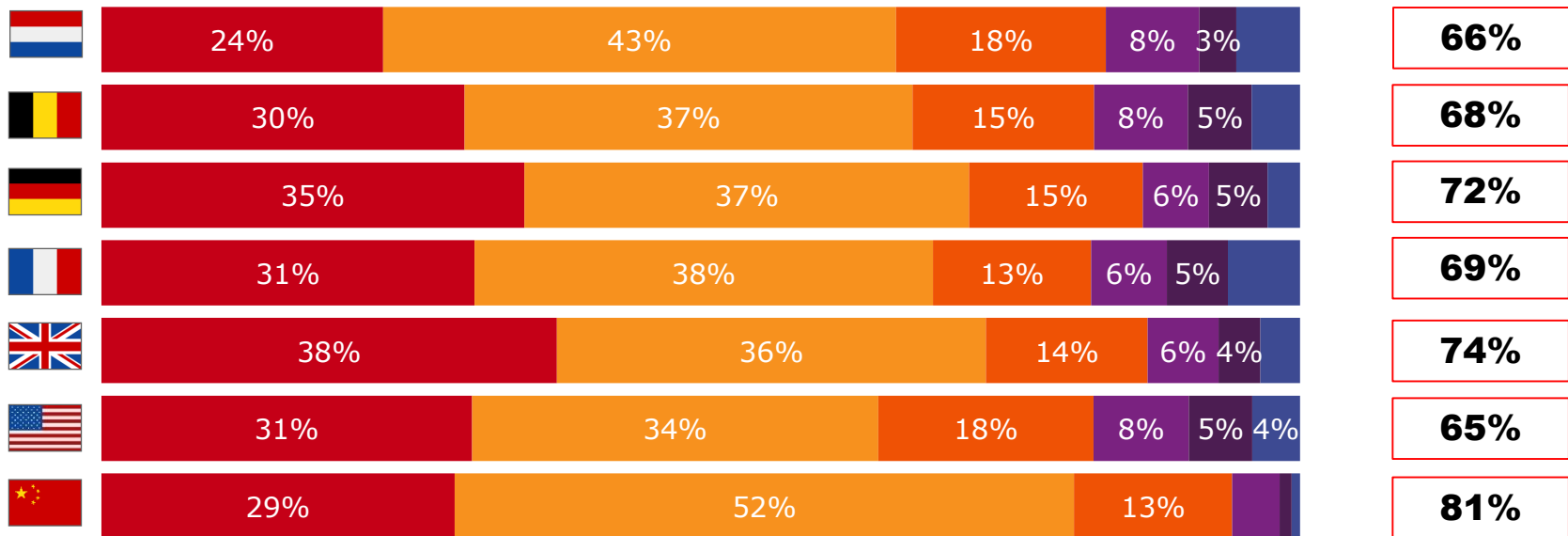
Based on:  
total sample

# Statement: Influence of coronavirus crisis on holiday destination 2021

The majority of respondents expect that the coronavirus outbreak will also affect their choice of holiday destination in the next year. This mainly applies to China but also to the countries of origin important to the Netherlands such as Germany and the United Kingdom.

Statement:

I expect that the corona outbreak will influence my choice of holiday destination for next year (2021)



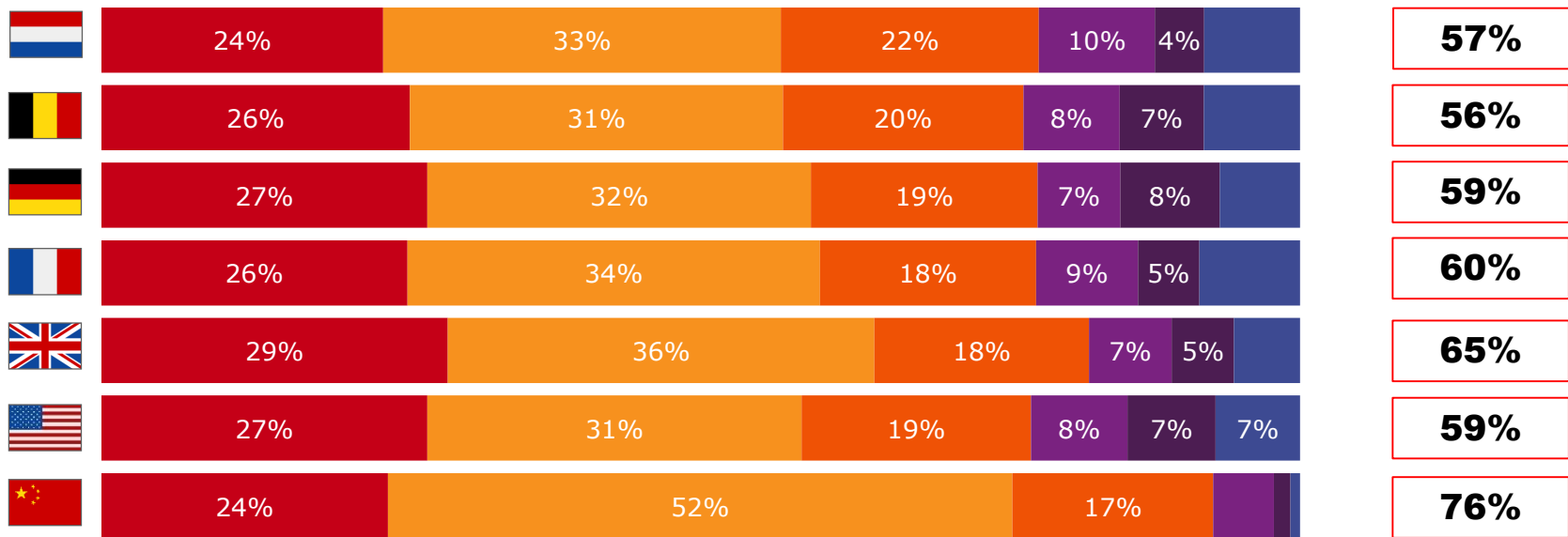
■ Totally agree  
 ■ Agree  
 ■ Do not agree, do not disagree  
 ■ Disagree  
 ■ Totally disagree  
 ■ Do not know

Based on:  
total sample

# Statement: Period between booking and date of departure holiday 2021

In China and the United Kingdom in particular, in 2021 people are anticipating booking their holidays closer to the intended date of departure due to the uncertainties resulting from the coronavirus outbreak.

Statement: Due to the uncertainty caused by the corona outbreak, I will book my holiday for next year (2021) closer to my preferred departure date



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

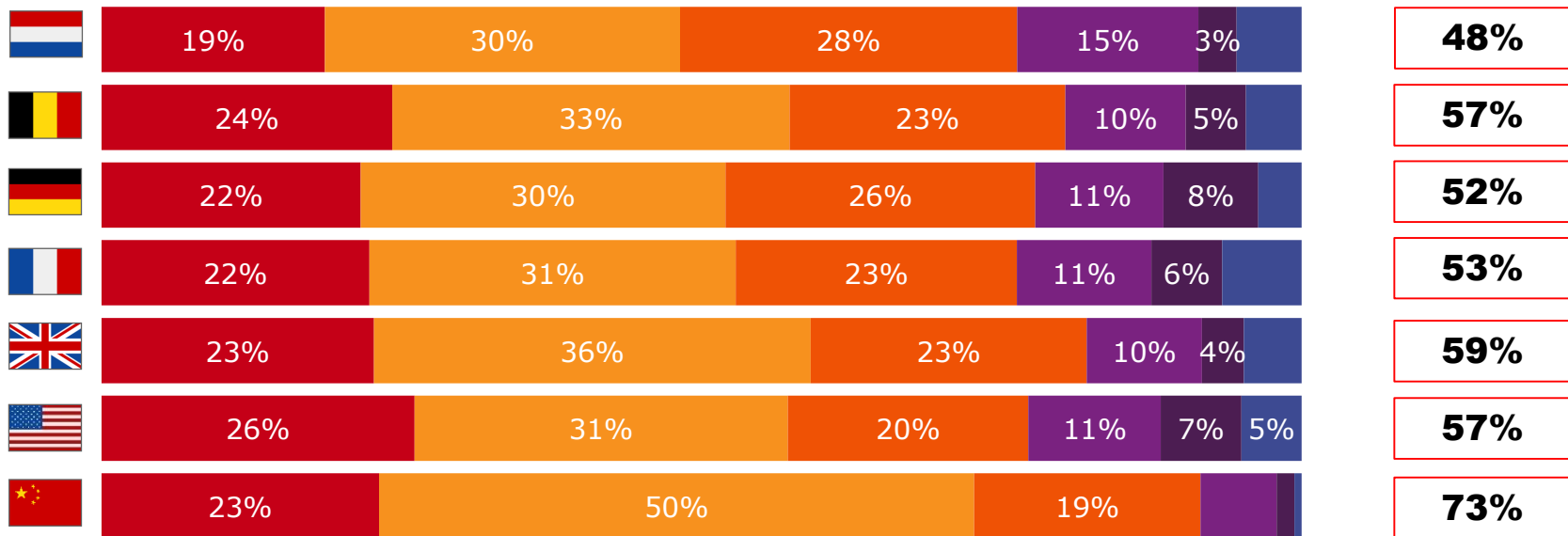
Based on:  
total sample

# Statement: Influence of coronavirus on the number of holidays in 2021

More than half of the respondents expect to go on holiday less often next year as a result of the coronavirus outbreak. This is particularly the case for Belgians and citizens of the United Kingdom. In China, almost three quarters of all citizens expect to go on holiday less often next year.

Statement: Due to the corona outbreak, I expect to go on holiday less often next year (2021)

**Top 2**



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

Based on:  
total sample





  
**Schiphol**  
Group



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Holland Marketing