

Customer Insights
Route Business Development

Corona Sentiment Monitor Holiday Plans

Fifth measurement

November 2020



NBTC
Holland Marketing



Survey design

- In cooperation with NBTC Holland Marketing, Schiphol 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 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

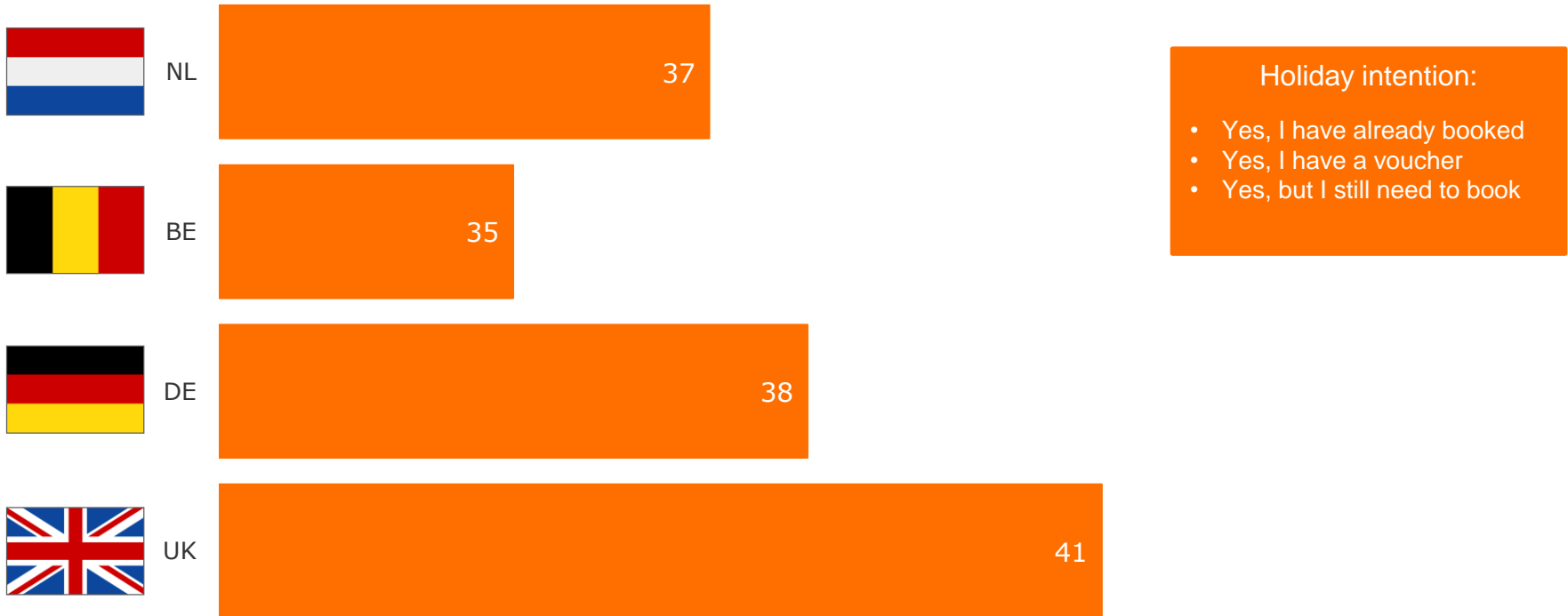
- **Objective:** Insights in international holiday plans and influence of coronavirus pandemic on travel behavior
- **Method:** Online research
- **Target group:**
 - Measurement 1: NL / BE / DE / FR / UK / USA / China
 - Measurement 2: NL / BE / DE / FR / UK / USA / China
 - Measurement 3: NL / BE / DE / UK
 - Measurement 4: NL / BE / DE / FR / UK / USA / China
 - Measurement 5:** 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:**
 - Measurement 1: 21 May to 1 June, 2020
 - Measurement 2: 17 June to 26 June, 2020
 - Measurement 3: 24 July to 28 July, 2020
 - Measurement 4: 7 September to 18 September, 2020
 - Measurement 5:** 27 October to 1 November, 2020

More information

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- **Route Business Development:** Ebeline Dijkhuis - dijkhuis_e@schiphol.nl

Holiday intention 2020 (1/3)

In the previous measurement about half of the respondents had plans for a holiday in 2020, but now we see that this group has become smaller. On average, two out of five people have holiday plans for the last two months of the year. The holiday intention in Belgium, just like in the previous measurement, is slightly below other European countries around us.



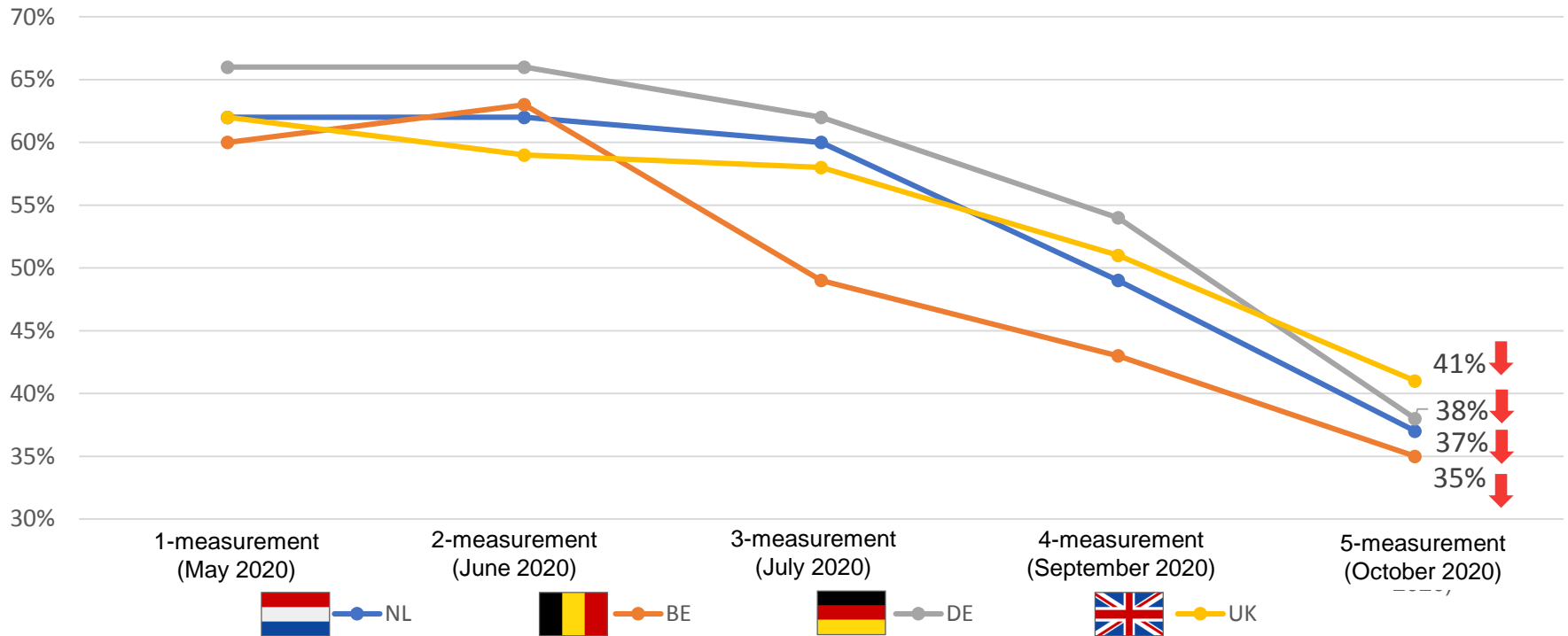
Based on:
total sample

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

Holiday intention 2020 (2/3)

Overall, the holiday intention shows a significant downward trend. The effect of the second wave of the coronavirus outbreak seems clearly visible. Another factor affecting this trend is the end of the autumn holidays.

Development of holiday intention



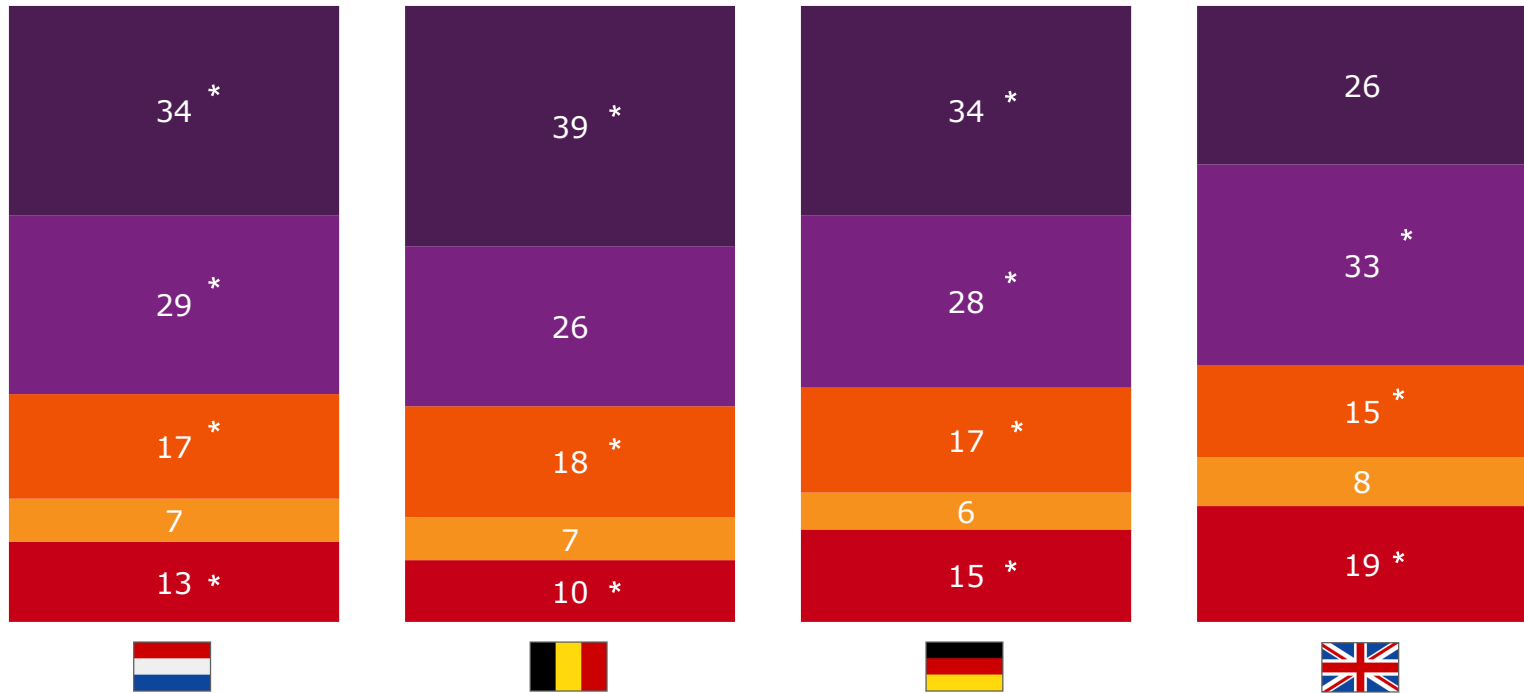
Based on:
total sample

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 differences compared to the previous measurement on practically all categories. The number of people that have already booked has declined in all countries. In Germany (-10%) this group has declined the most. The number of people who do have plans to go on holiday but who have not booked yet has also declined. The number of people without any plans has increased.



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

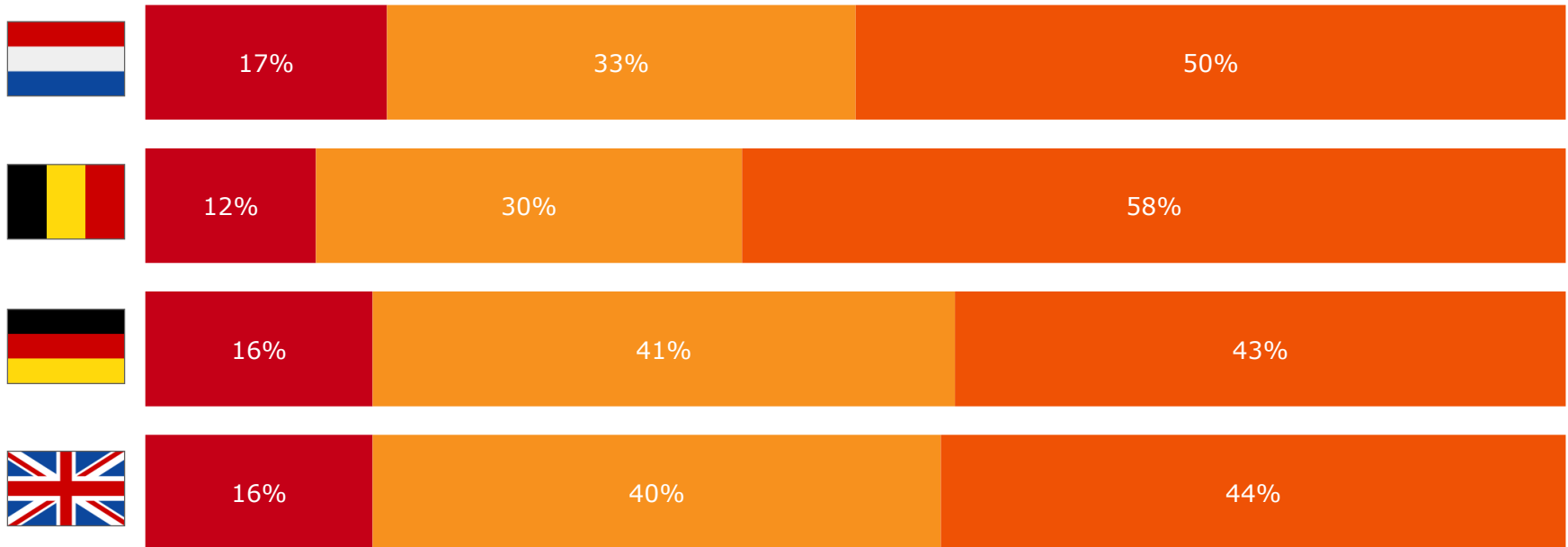
Based on:
Total sample

*: significant difference compared
to previous measurement

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

Month of departure if booked

Holidays that have already been booked are primarily taking place in the month of December. The effect of the measures in Belgium is clearly visible: holidays are more often planned for the month of December than in other countries.



■ October

■ November

■ December

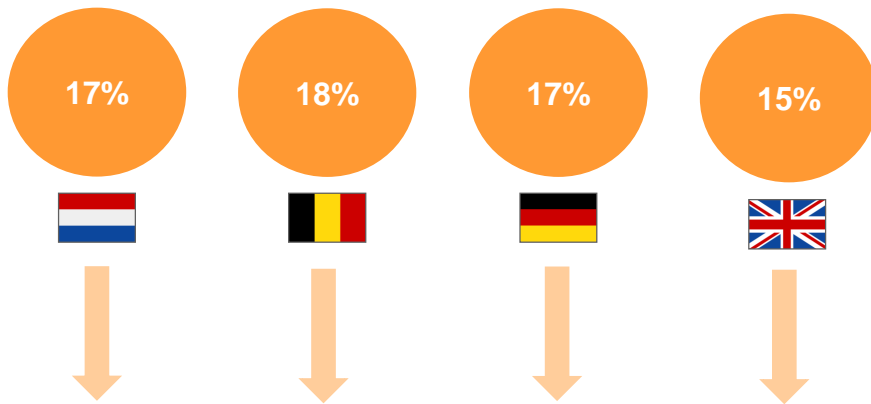
Based on:
People who have already booked a holiday in 2020

Question:
In which month are leaving for this holiday?

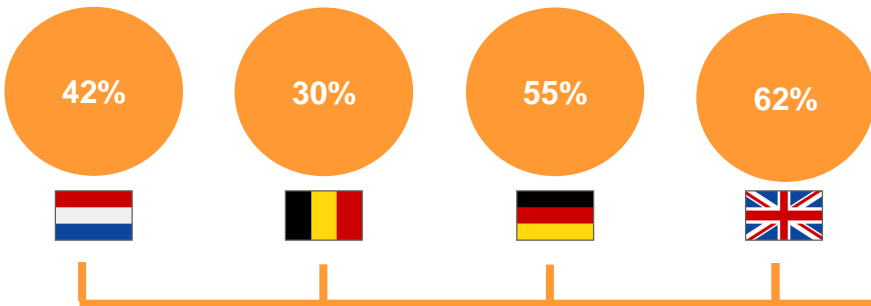
Potential holidays

Almost one-fifth of people in the Netherlands and the countries around us 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 December is the most important month of departure. More than two in five are already looking at a holiday in 2021.

Holiday intention but still need to book



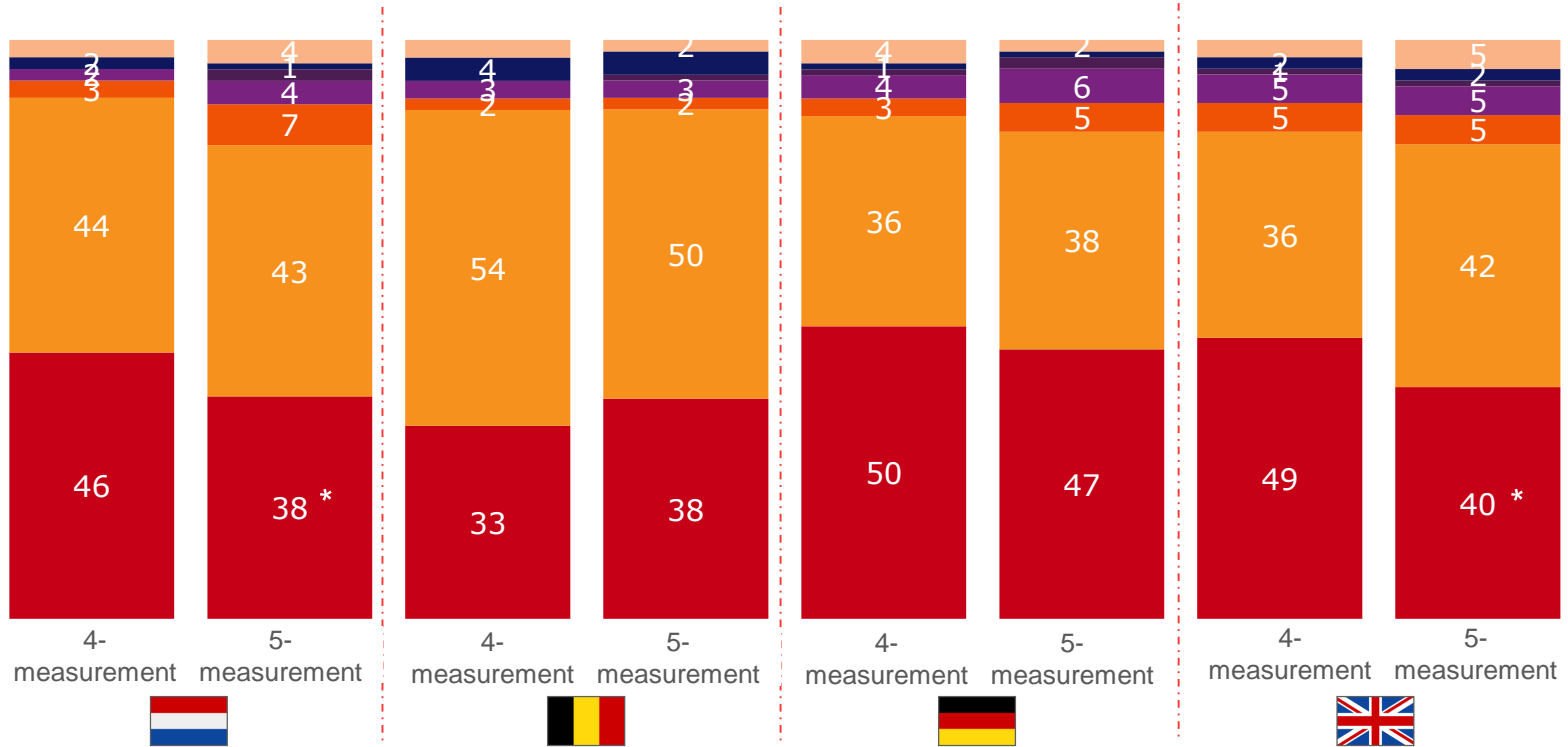
Looking for holiday destinations



Month of departure:				
November	14%	15%	11%	21%
December	34%	27%	46%	24%
Next year	38%	57%	40%	51%
I do not know	4%	2%	3%	4%
Sample	N=73	N=55	N=93	N=91

Region/continent

In the Netherlands, Belgium and the United Kingdom, two out of five people with holiday plans have indicated that they plan to stay in their home countries. In Germany that number is almost half. Interesting is the increase in the number of Brits with holiday plans in Europe.



■ Home country ■ Europe ■ North or South America ■ Asia ■ Australia/Oceania ■ Africa ■ I do not know yet

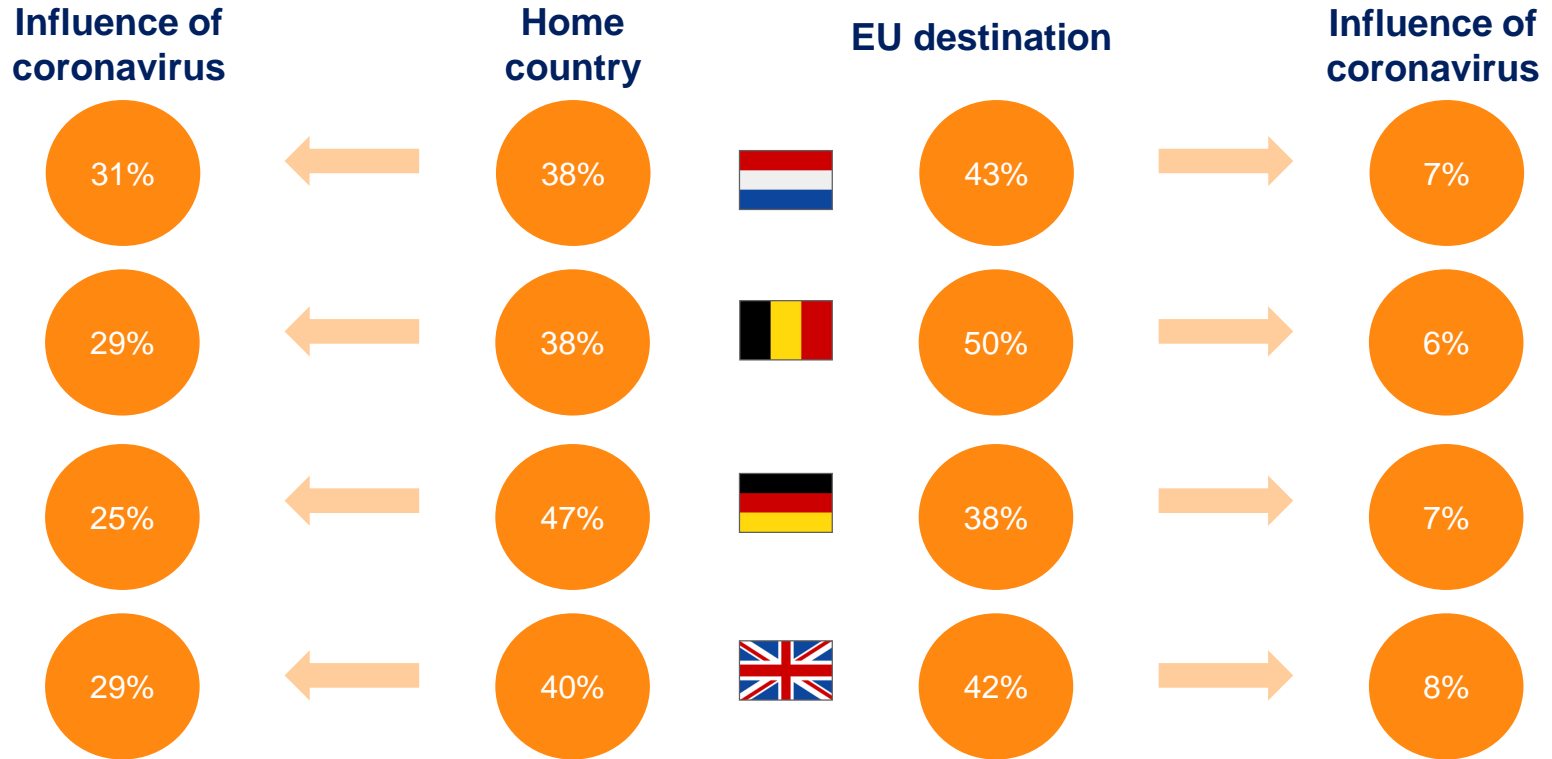
Based on:
People with holiday plans (booked/voucher/still have to book)

*: significant difference compared to previous measurement

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

Influence of coronavirus on choice of holiday destination

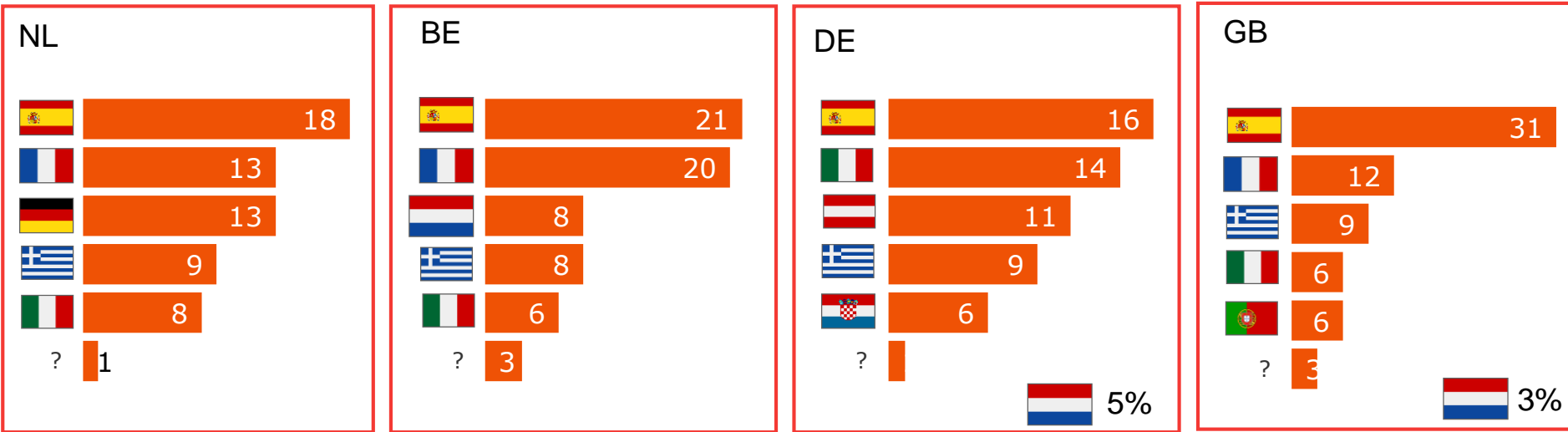
In most European countries, three out of ten respondents have indicated that the decision to stay in their home country is based on the coronavirus outbreak. The choice for a European holiday destination is influenced by the coronavirus outbreak to a much smaller extent.



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

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

Top 5 European destinations – Spain continues to be the most popular destination



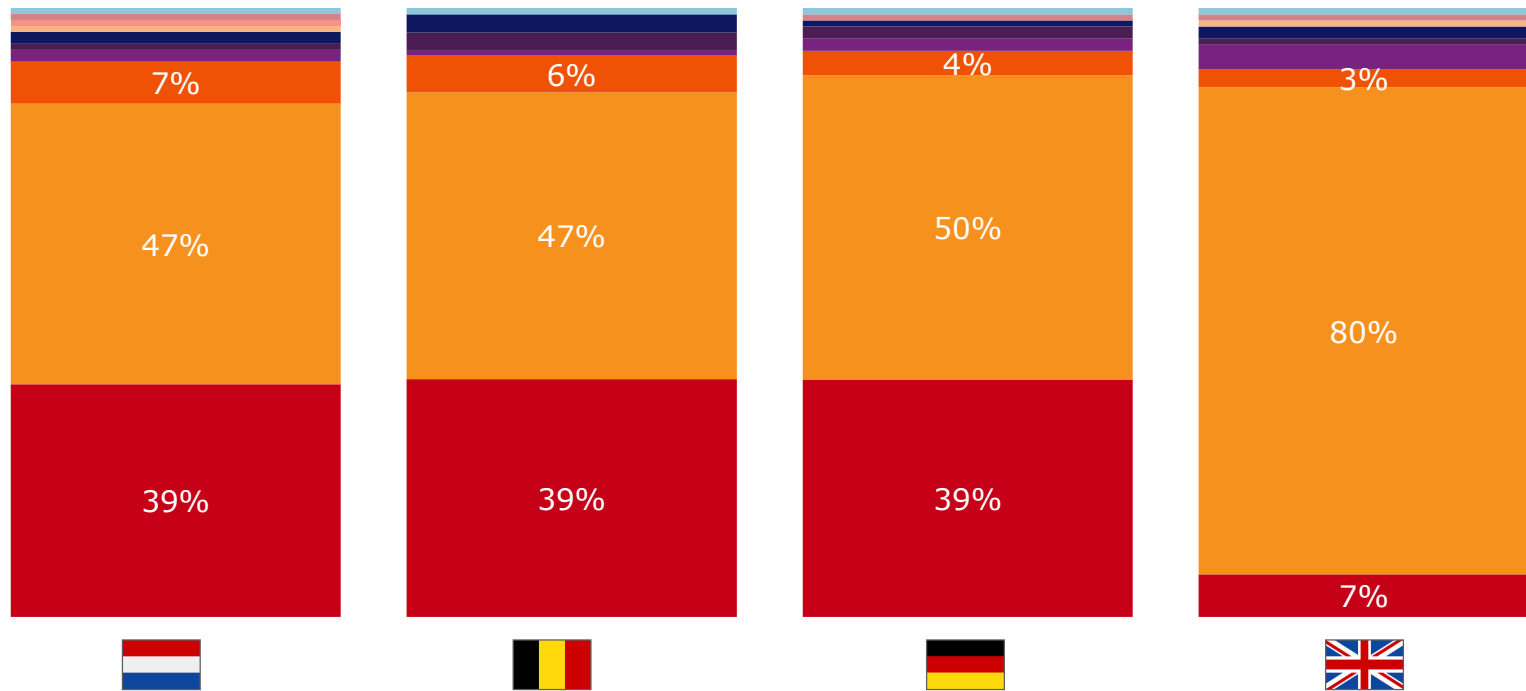
- Spain remains the most popular destination by far even during these times. Not only among Dutch holidaymakers but also for people from other countries with holiday plans. This is likely caused by the fact that the Canary Islands are now also code yellow, which makes travel to the Spanish archipelago possible.
- Other countries with a Mediterranean character such as Greece and Italy remain popular, though considerably less so than Spain.
- A slight shift can be observed in the position of the Netherlands as a holiday destination; due to the increase in the number of infections and the current measures, the Netherlands is slightly less popular as a holiday destination.

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 European holiday plans

The plane remains the most popular mode of transportation for people who have holiday plans somewhere in Europe.



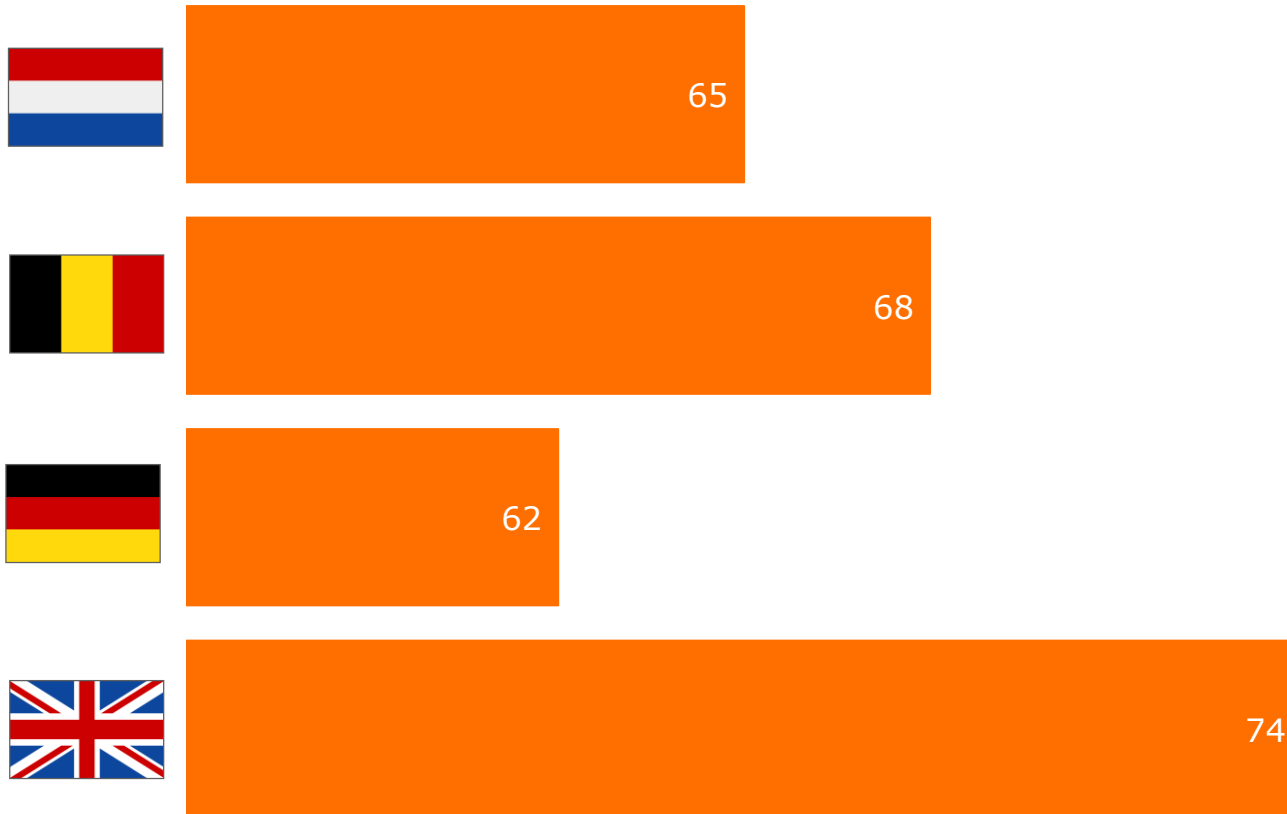
Car Plane Train Boat Campervan Coach Bicycle/moped Motorbike Different Don't know yet

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?

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, among whom approximately three out of four 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.

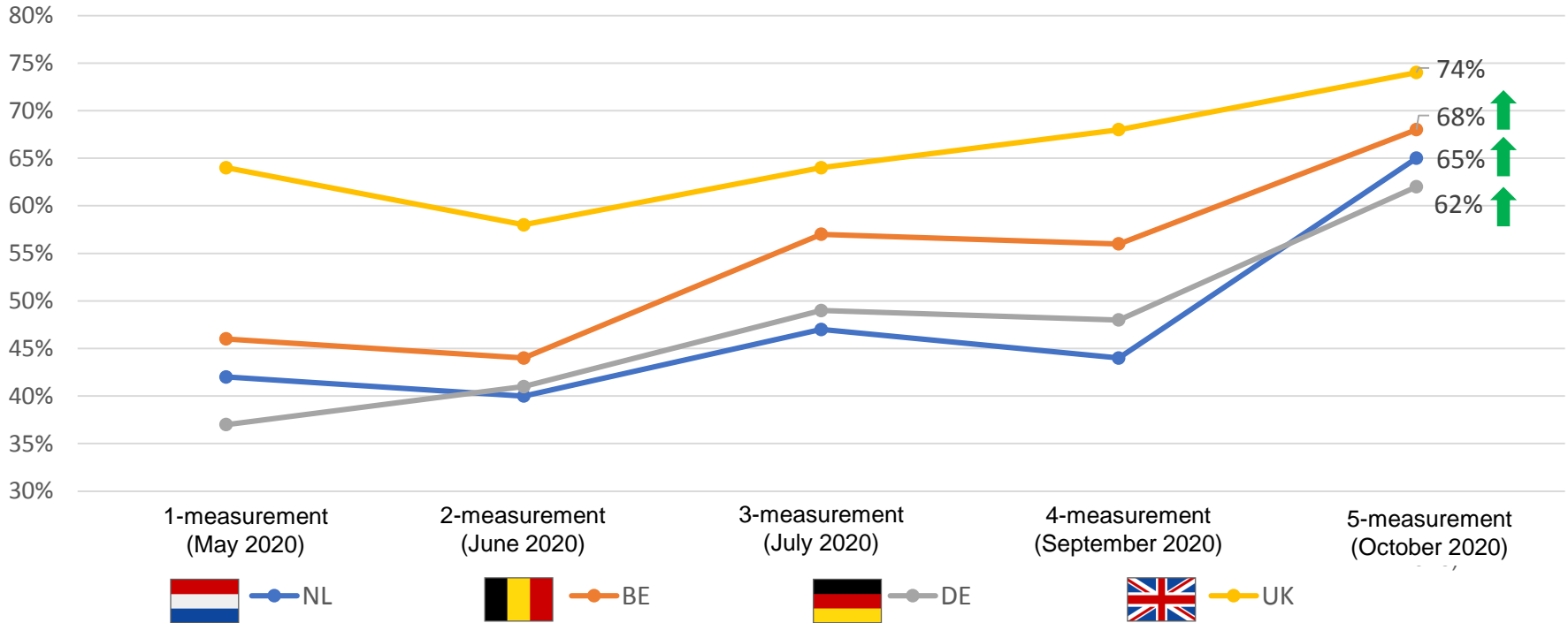


Based on:
People without holiday plans

Question:
To what extent does the current coronavirus/COVID-19 crisis 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 coronavirus outbreak is having an increasingly stronger influence on the decision whether or not to go on holiday. The influence of the second wave is clearly visible. Particularly in the Netherlands, the influence on the absence of holiday plans is on the rise.



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?

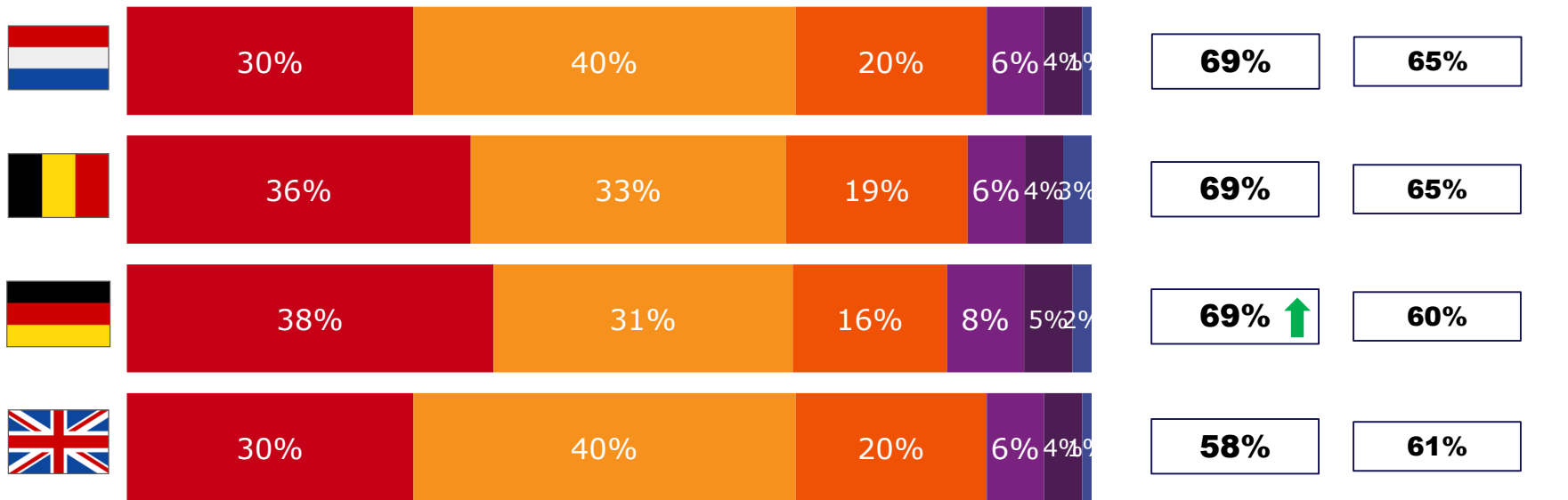
↑ Significant increase

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

In all countries, with the exception of the United Kingdom, seven out of ten people have indicated that they would prefer to spend their holiday closer to home due to the coronavirus outbreak. In Germany this group has seen the strongest growth compared to the previous measurement.

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

Top 2



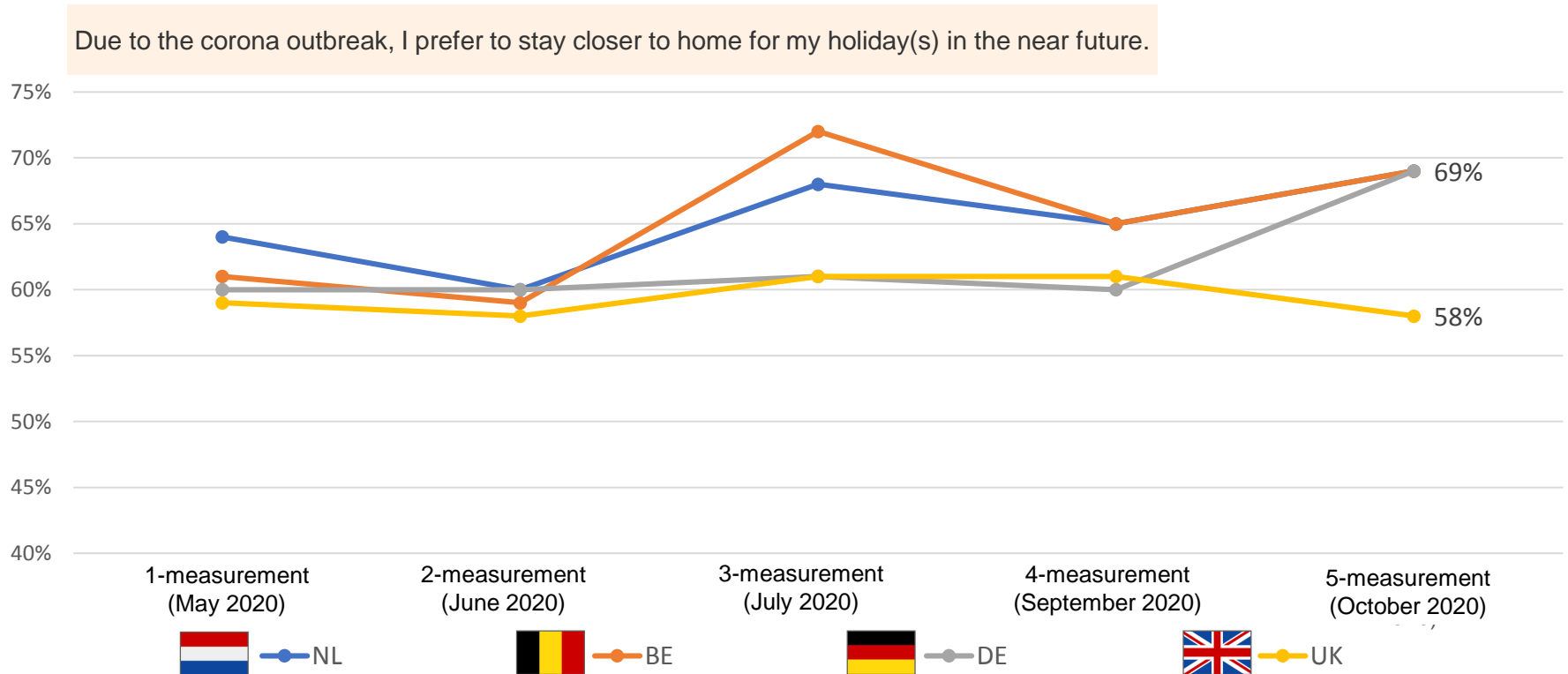
■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Based on:
total sample

↑ Significant increase

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

The second coronavirus wave and associated measures ensure that more Dutch, German and Belgian people have indicated to stay closer to home for a holiday. People from the United Kingdom have indicated more often that they have plans for holidays to a European destination, resulting in the fact that the group of people who plan to stay closer to home has become smaller.

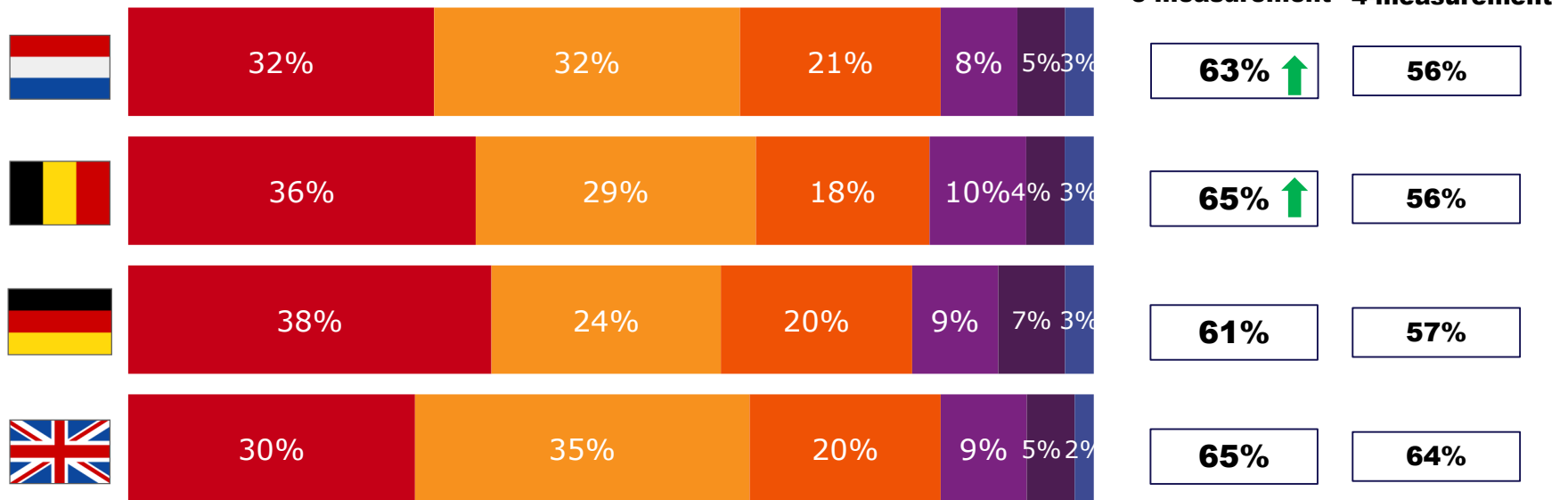


Based on:
total sample

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

Approximately two-thirds of the respondents in all countries have indicated that they will not travel abroad unless they are certain that there are no new coronavirus infections there. Dutch and Belgian people have clearly become more cautious compared to the previous measurement.

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

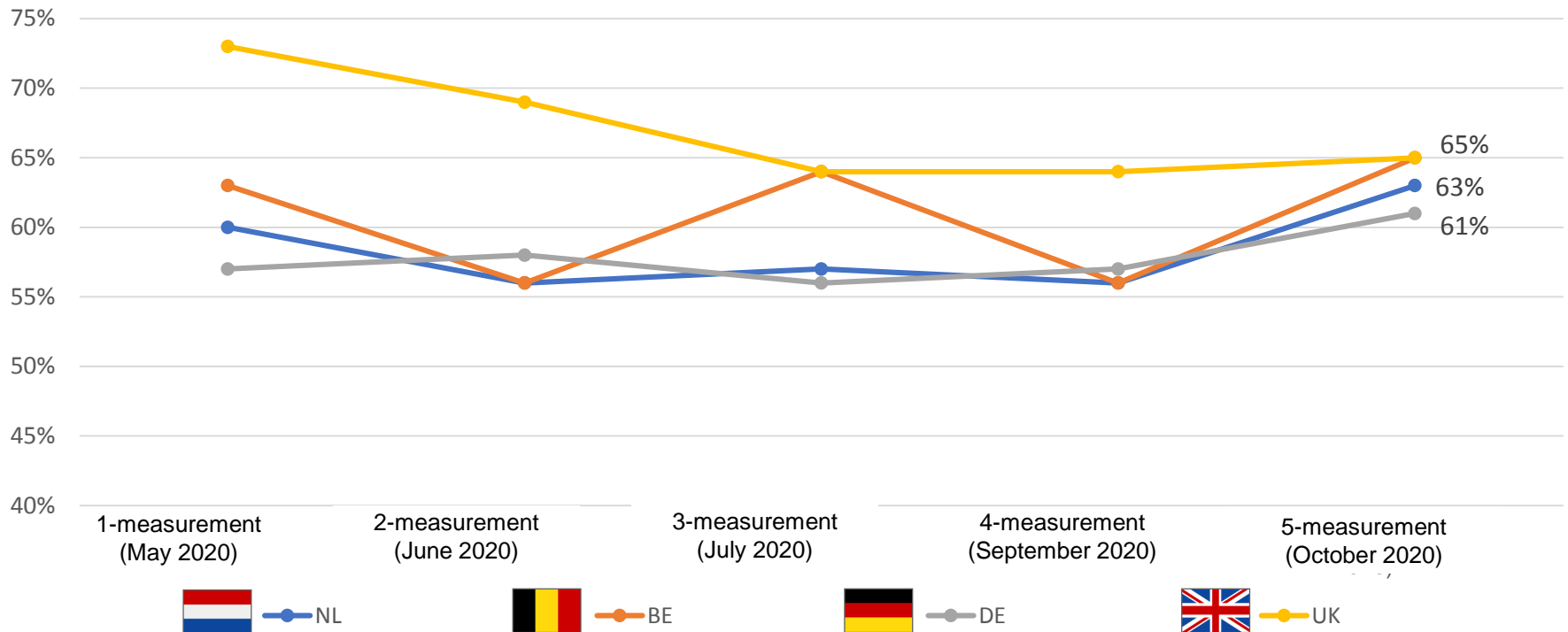
Based on:
total sample

↑ Significant increase

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

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

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

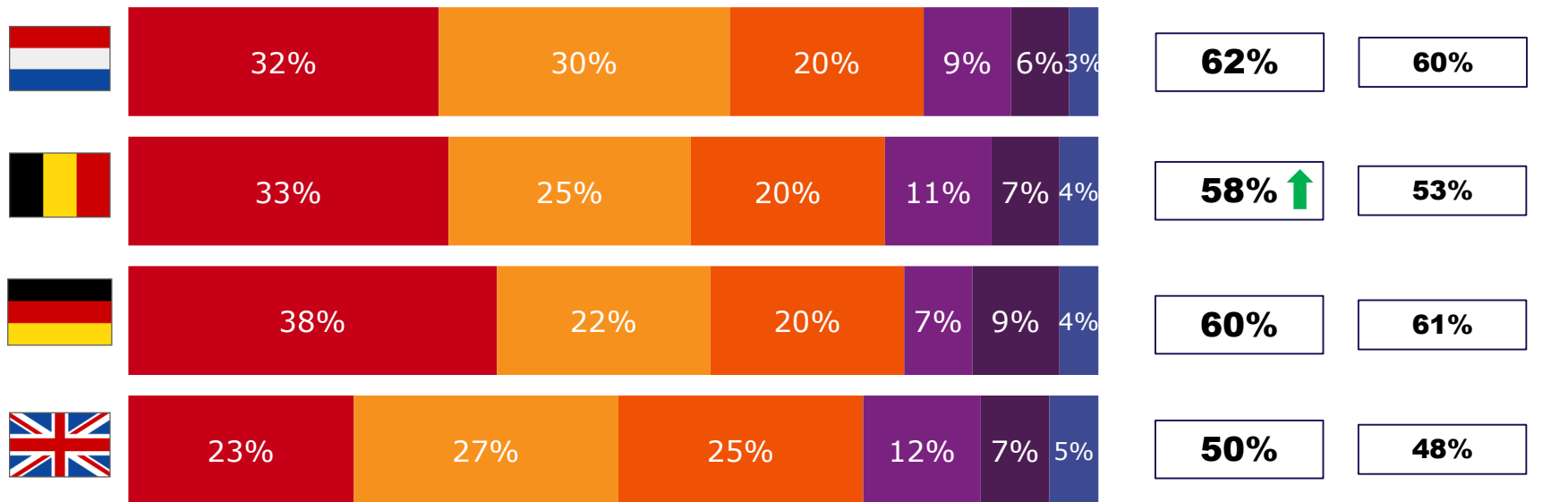


Based on:
total sample

Statement: Popularity of air travel (1/2)

Although the plane is the most popular mode of transportation for a holiday, three out of five respondents have indicated that they feel less comfortable travelling by plane considering the current state of affairs. This hesitation is slightly less present in the United Kingdom.

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



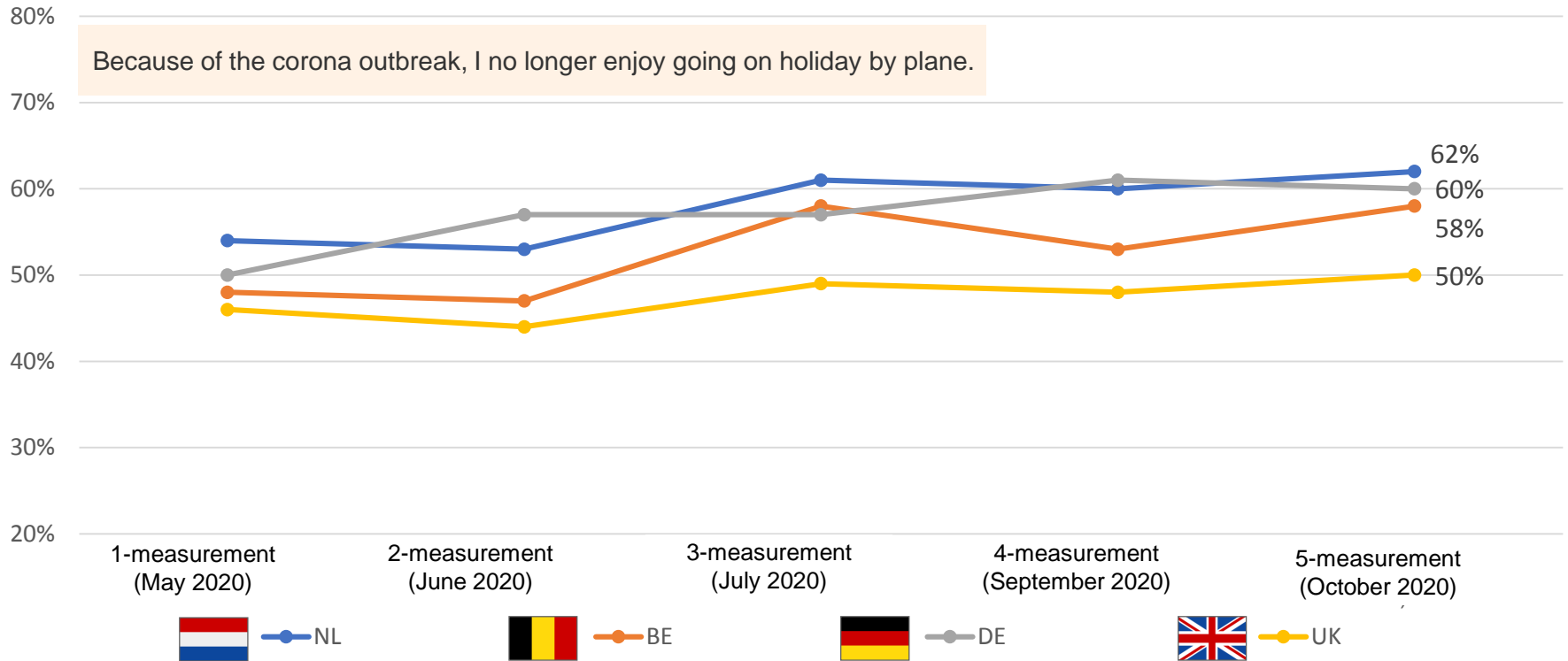
■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Based on:
total sample

↑ Significant increase

Statement: Popularity of air travel (2/2)

The attitude of Belgian holidaymakers in regards to flying has become more sceptical again in this measurement and is comparable to the measurement in July. In the other countries shifts are barely visible: six out of ten people have indicated that they are less happy to fly as a result of the coronavirus pandemic.

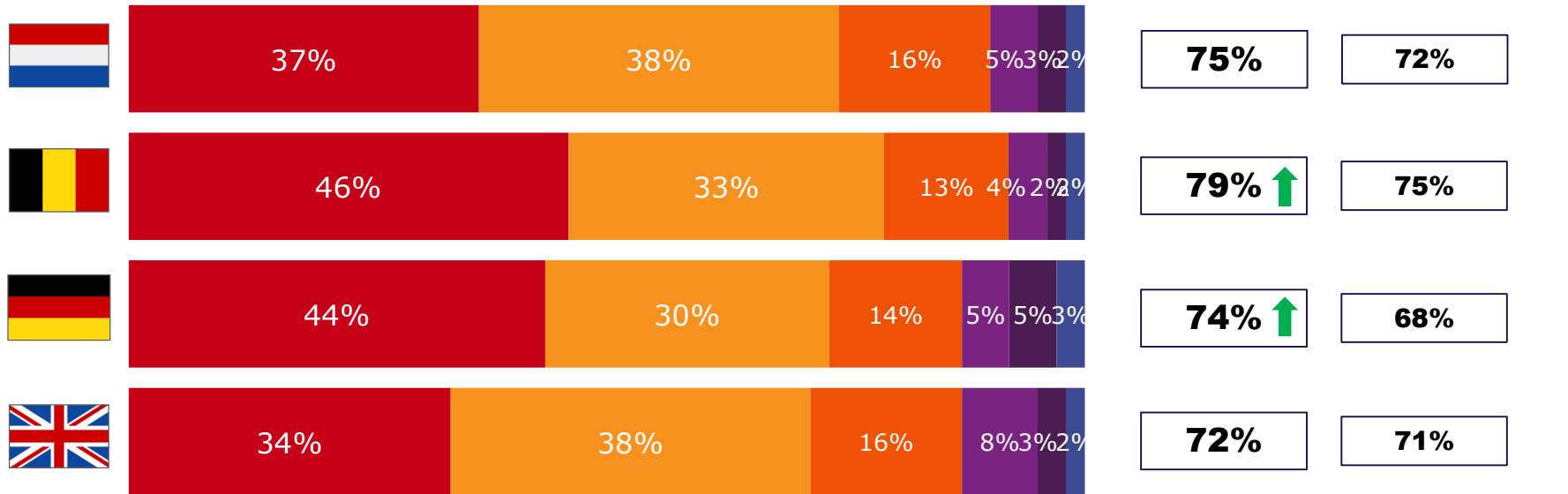


Based on:
total sample

Statement: Avoid busy tourist areas (1/2)

In Belgium and Germany, the desire to avoid busy tourist destinations has increased. Overall, three quarters of people have indicated a desire to avoid busy tourist areas during their next holiday.

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



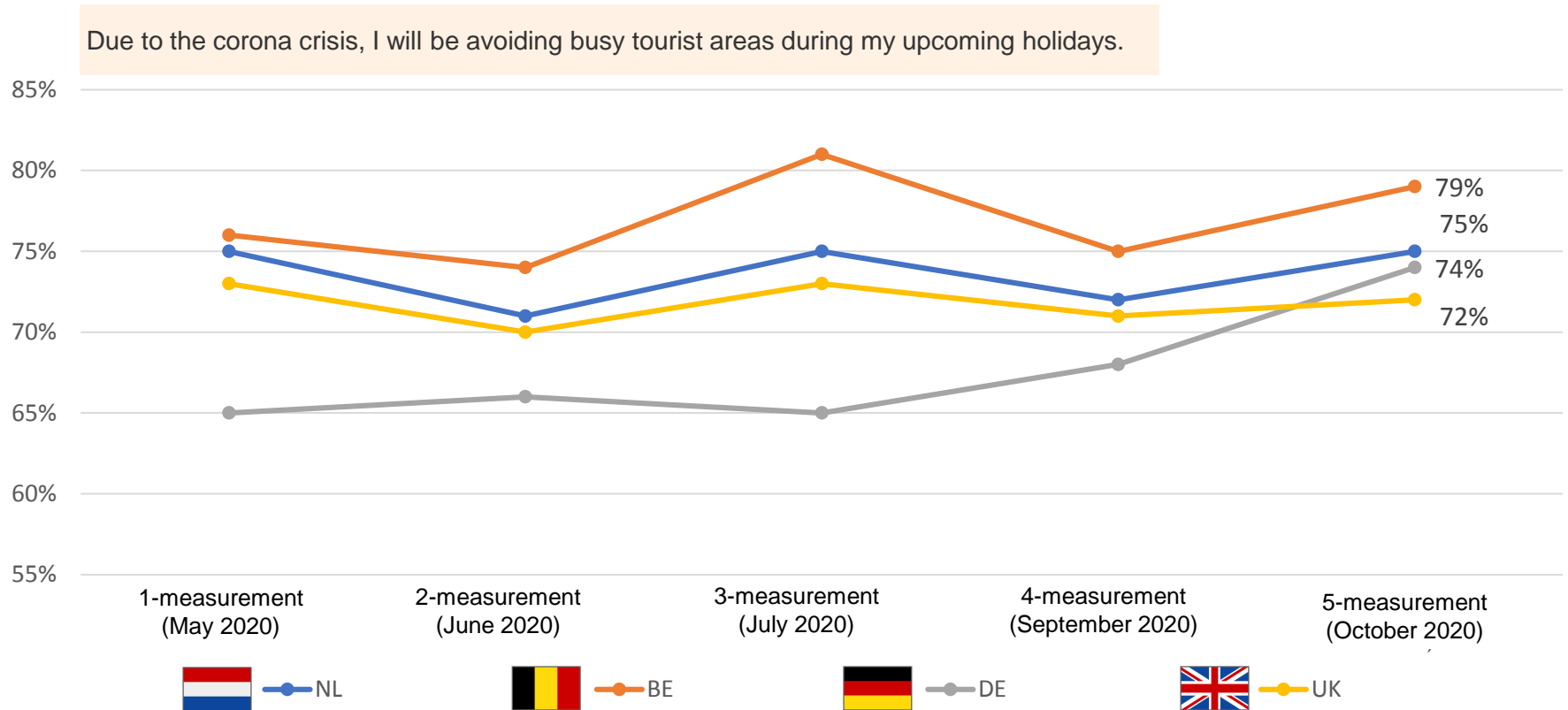
■ Totally agree
 ■ Agree
 ■ Do not agree, do not disagree
 ■ Disagree
 ■ Totally disagree
 ■ Do not know

Based on:
total sample

↑ Significant increase

Statement: Avoid busy tourist areas (2/2)

Due to the further growth of the second corona wave, the influence of the corona outbreak on avoiding busy tourist areas is still very large. In Belgium and Germany in particular the influence of the coronavirus pandemic has grown significantly.



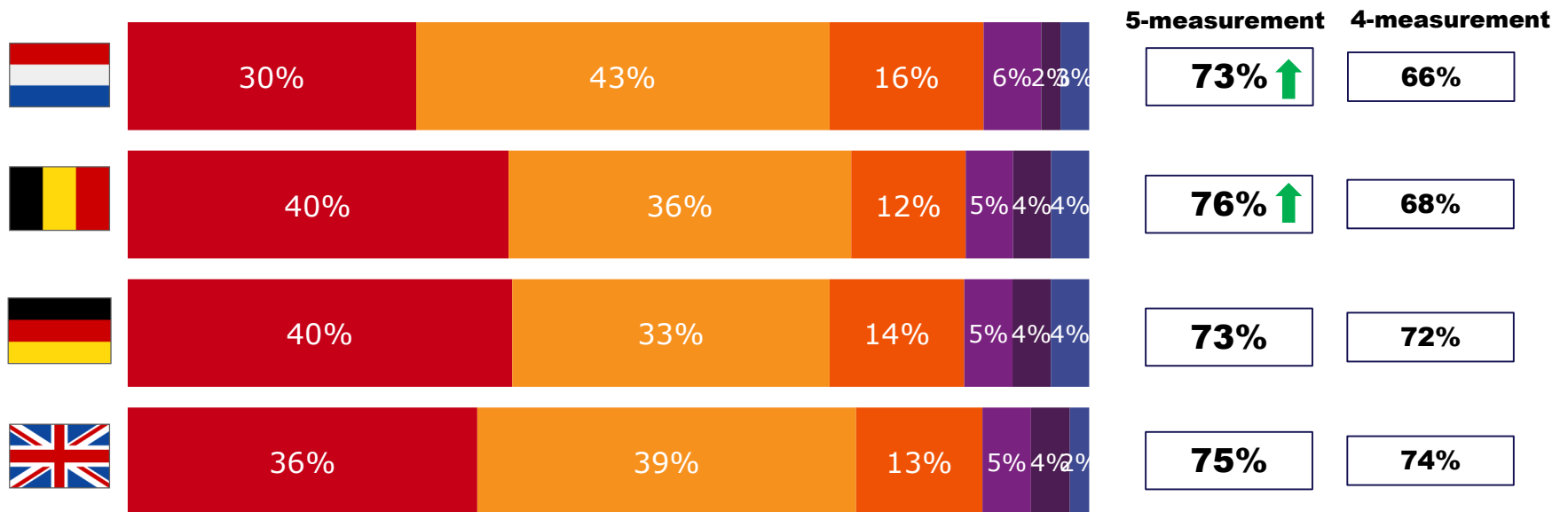
Based on:
total sample

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 new year. The additional measures in the Netherlands and Belgium appear to have led more people to believe that they will still be feeling the effects of the coronavirus outbreak well into next year and this is reflected in their choice of holiday destination.

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

Top 2



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

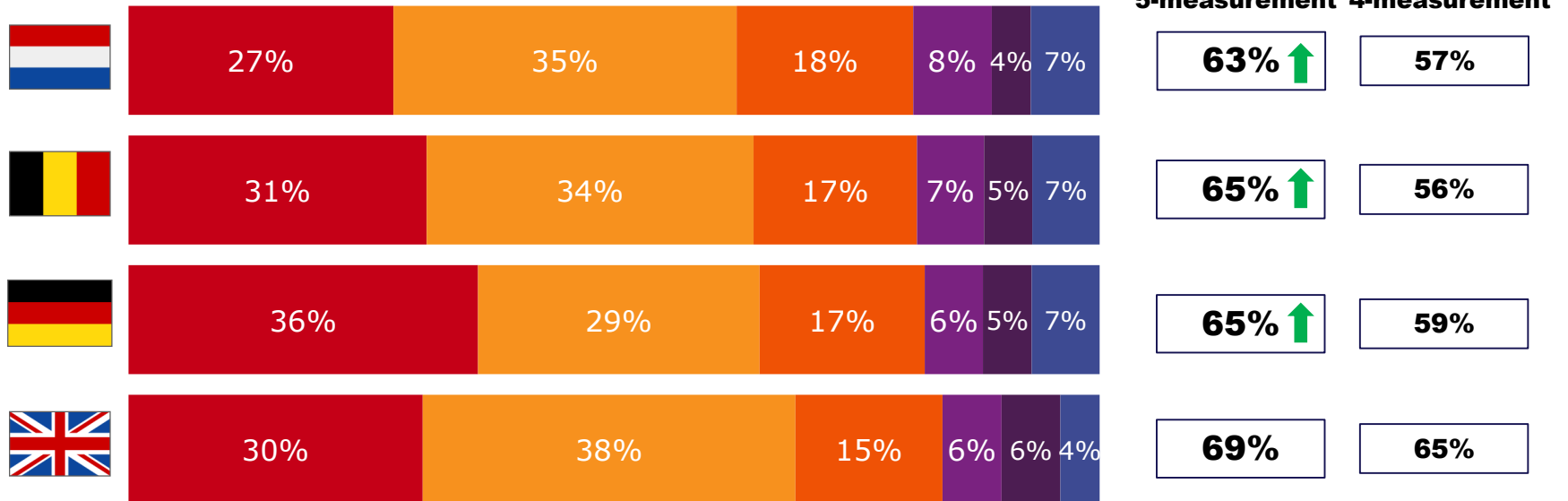
Based on: total sample

↑ Significant increase

Statement: Period between booking and date of departure holiday 2021

Two-thirds of people are anticipating booking their holidays closer to the intended date of departure due to the uncertainties resulting from the coronavirus outbreak. Here we also see the effects of the second wave; in almost all countries we see an increase in the number of people expecting to book shorter in advance.

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

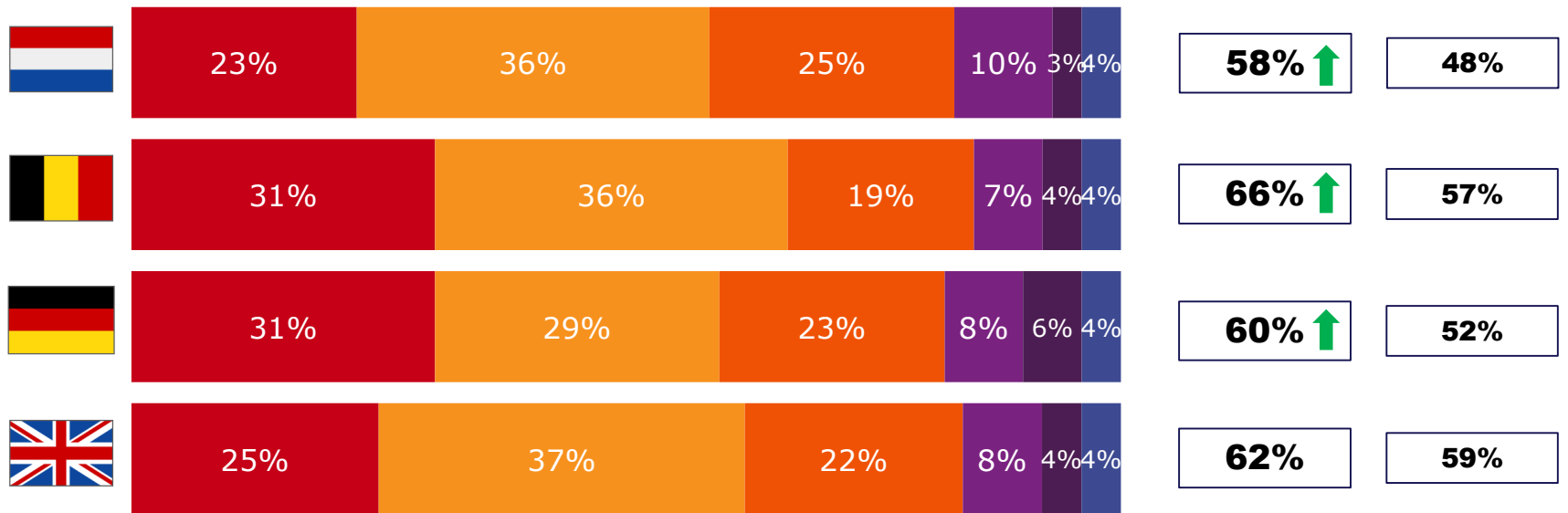
Based on:
total sample

↑ Significant increase

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

Six out of ten 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 Brits. Here we also see the effects of the second wave on holiday intentions for 2021.

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



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

Based on: total sample

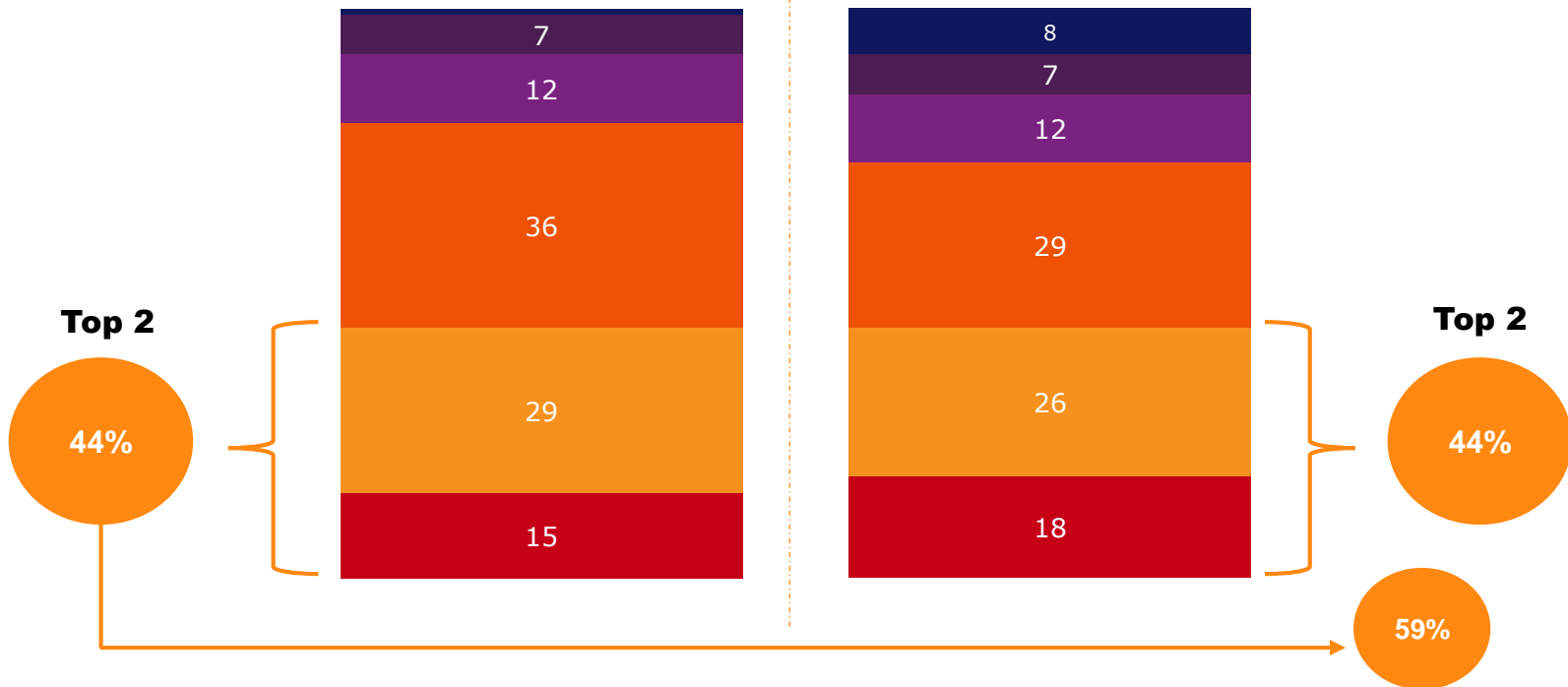
↑ Significant increase

The Netherlands as a future holiday destination

More than two out of five Dutch people have started to think more positively about the Netherlands as a holiday destination as a result of the coronavirus crisis. In addition, a similar group has indicated to consider the Netherlands as a holiday destination for 2021. For the group of people who have started to think more positively about the Netherlands as a holiday destination, three out of five people are considering a holiday in their home country.

The coronavirus outbreak has made me think more positively about the Netherlands as a holiday destination.

I am considering spending my summer holidays/most important holiday in the Netherlands next year (2021).



■ 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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