

Customer Insights
Route Business Development

Corona Sentiment Monitor Holiday Plans

Sixth measurement

January 2021



NBTC
Holland Marketing



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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
 - Measurement 6:** 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:**
 - 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
 - Measurement 6:** 7 January to 31 January 2021

More information

- **Customer Insights:** Jenneke Smit-Banting - banting_j@schiphol.nl
- **Route Business Development:** Ebeline Dijkhuis - dijkhuis_e@schiphol.nl

Take outs.

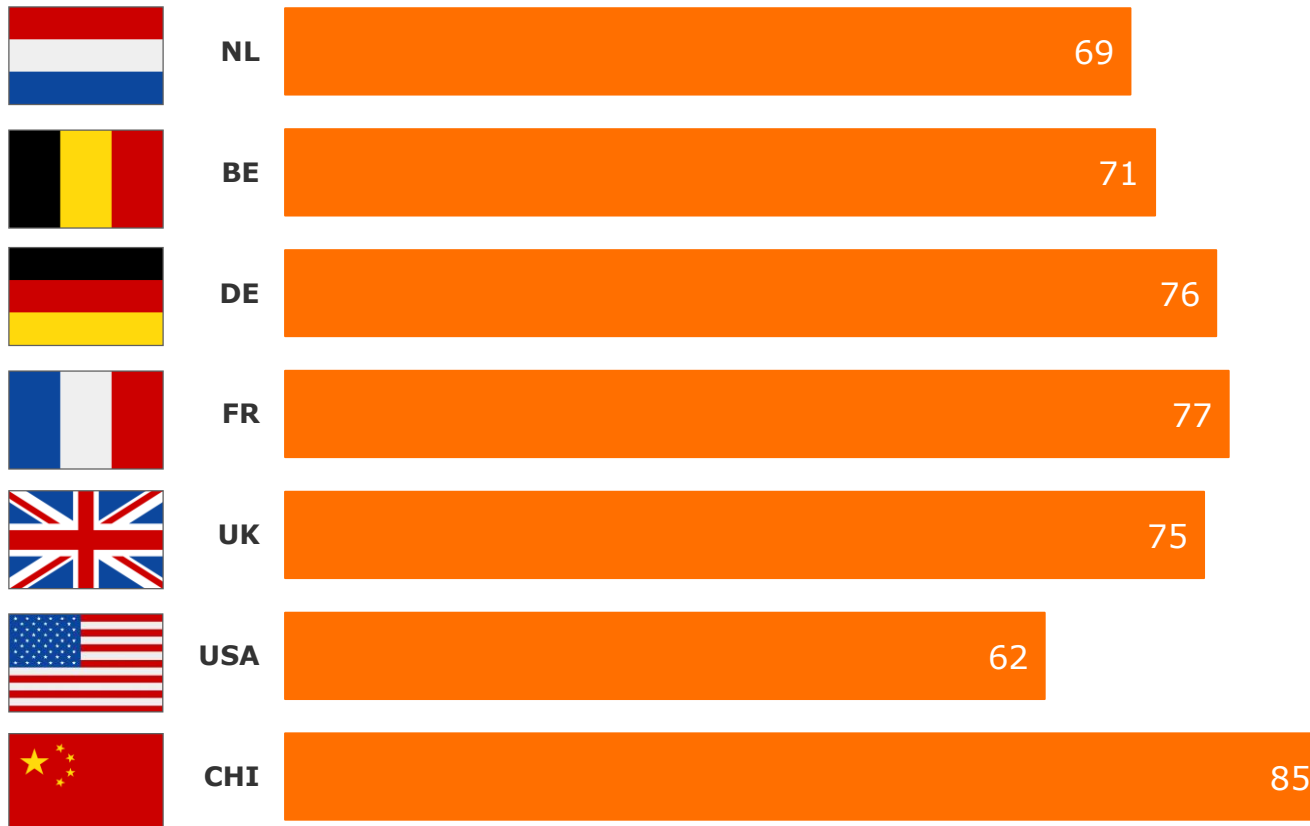
1. Great desire to start travelling again: seven out of ten respondents have the intention to go on holiday in 2021.
2. Great potential and lots of uncertainty at the same time: almost half of all respondents have indicated that they want to go on holiday but that they still need to book.
3. Share of booked holidays is still very low; actual trips booked is still below twenty percent. Holidays already booked will mainly take place during the summer months.
4. Dutch people, Germans, and Belgians with holiday plans in particular appear to be hopeful that they will be able to travel to a European destination again for their next holiday. Almost half of them have indicated to have plans for a holiday in Europe. The majority of French and British people and Americans plan to stay in their own countries.
5. The coronavirus outbreak continues to have a great impact on holiday behaviour:
 - Holiday destination: Seven out of ten respondents have indicated that the choice of their holiday destination is being influenced by the coronavirus pandemic
 - More last-minute bookings: Six out of ten have indicated to book their holidays shorter in advance than usual
 - Fewer holidays: two out of three respondents expect to go on fewer holidays
6. The desire to go on holiday abroad again is huge. However, on average, only two out of five respondents expect to be able to fly to a destination abroad again by the summer.
7. Almost half of all Dutch people (45%) are considering spending the summer holidays in their own country.

Main results



Holiday intention 2021 (1/2)

Despite the current situation, travelling continues to be important for people. In the Netherlands and Belgium seven out of ten respondents have the intention to go on holiday in 2021. In other European countries even three quarters of respondents have indicated an intention to go on holiday.



Holiday intention:

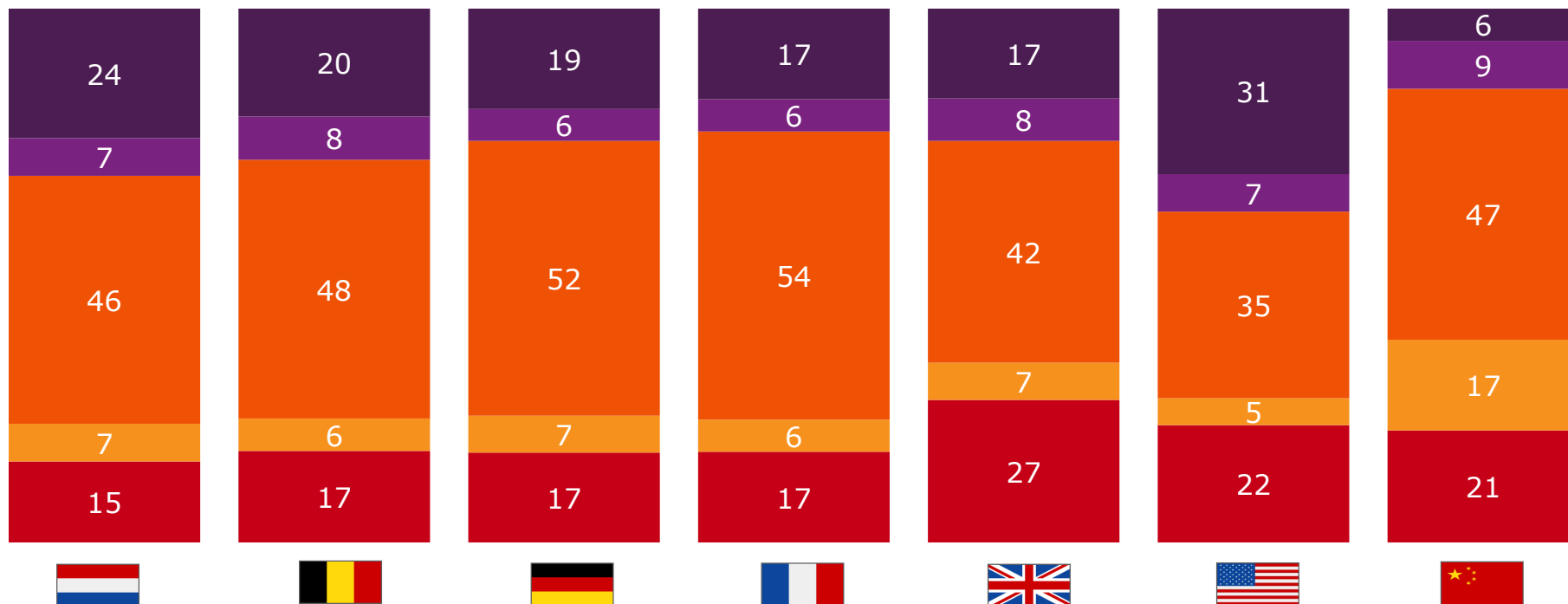
- Yes, I have already booked
- Yes, I have a voucher
- Yes, but I still need to book

Based on:
total sample

Question:
Do you currently intend to go on holiday sometime this year (in 2021)?

Holiday intention 2021 (2/2)

Overall, almost half of the respondents with holiday plans have not booked yet. The share of booked holidays is still very low; actual trips booked is still below twenty percent in almost all European countries. Surprisingly in the United Kingdom one in four respondents have already booked a holiday. In the US almost one-third has indicated to postpone their holidays until next year (2022).



■ Yes, already booked

■ Yes, voucher

■ Yes, still have to book

■ No, next year

■ No, no plans at all








Based on: total sample

Question:

Do you currently intend to go on holiday sometime this year (in 2021)?

Month of departure if booked

Holidays that have already been booked are primarily taking place in the summer months. French people and Americans on the other hand have booked their holidays more often for the first and second quarter.

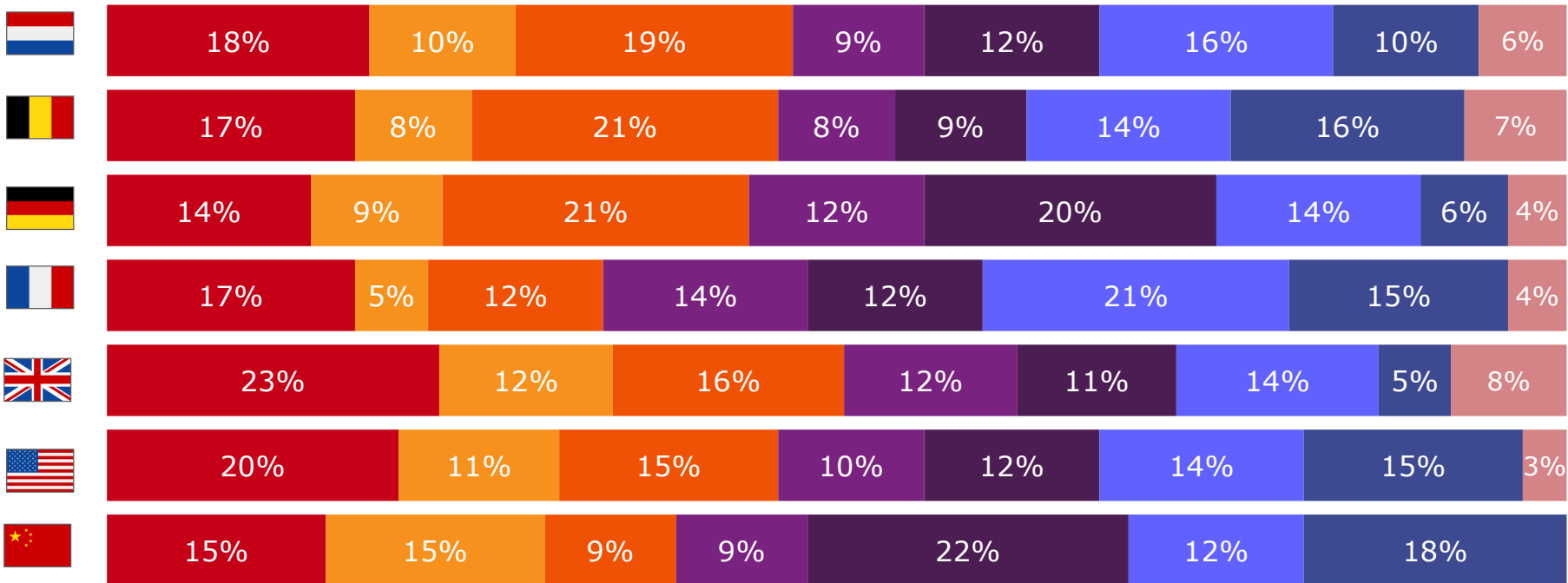
							
January	3	4	1	2	5	11	4
February	7	7	2	4	14	12	8
March	12	6	7	9	11	13	10
April	8	13	10	13	14	12	5
May	13	12	15	16	14	12	13
June	12	10	15	13	9	8	26
July	21	21	21	16	20	11	12
August	14	16	15	12	8	6	15
September	8	7	8	7	4	4	1
October	1	2	4	5	1	5	5
November	0	2	1	1	1	2	0
December	1	1	2	2	0	2	1
Total	100	100	100	100	100	100	100

Based on:
Respondents who have already booked a holiday in 2021

Question:
In which month are leaving for this holiday?

Booking period already booked holidays

The majority of the already booked holidays was booked in the last quarter of the previous year, despite the lockdowns and the more stringent measures. Compared to the other countries, Germany has seen relatively few bookings in January. In the United Kingdom and the United States in particular, many of the bookings were made a year ago.



■ Q1 2020
 ■ Q2 2020
 ■ Q3 2020
 ■ okt-20
 ■ nov-20
 ■ dec-20
 ■ January
 ■ Other/don't know

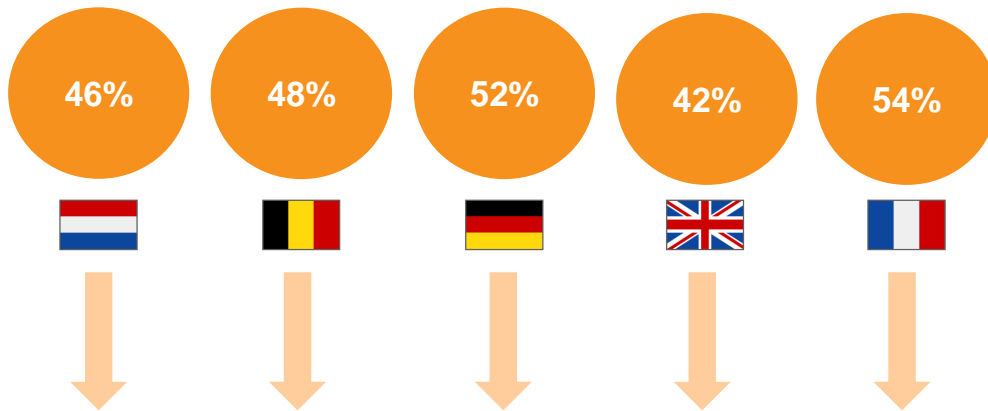
Based on:
Respondents who have already booked a holiday in 2021

Question:
When did you book this holiday?

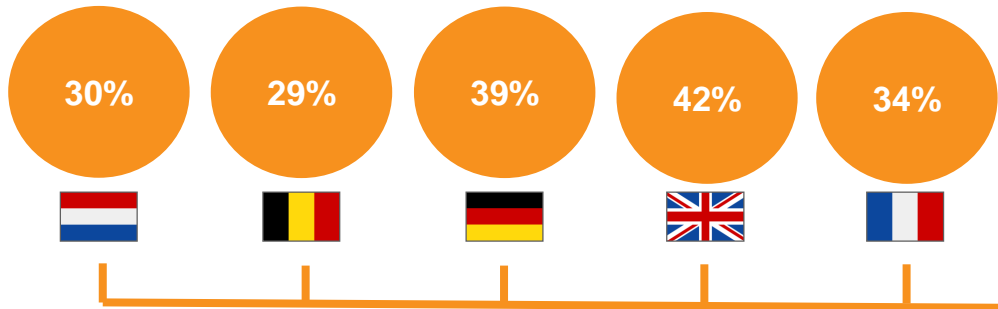
Potential holidays (1/2)

Overall, almost half of respondents have the intention to go on holiday but they still need to book. Of this group almost two out of five have indicated that they are already looking for a holiday. For this group, the third quarter is the most important period of departure. For Dutch people the May holiday is also a relevant period. There appears to be great potential but realisation is uncertain due to the developments surrounding the coronavirus pandemic.

Holiday intention but still need to book



Looking for holiday destinations

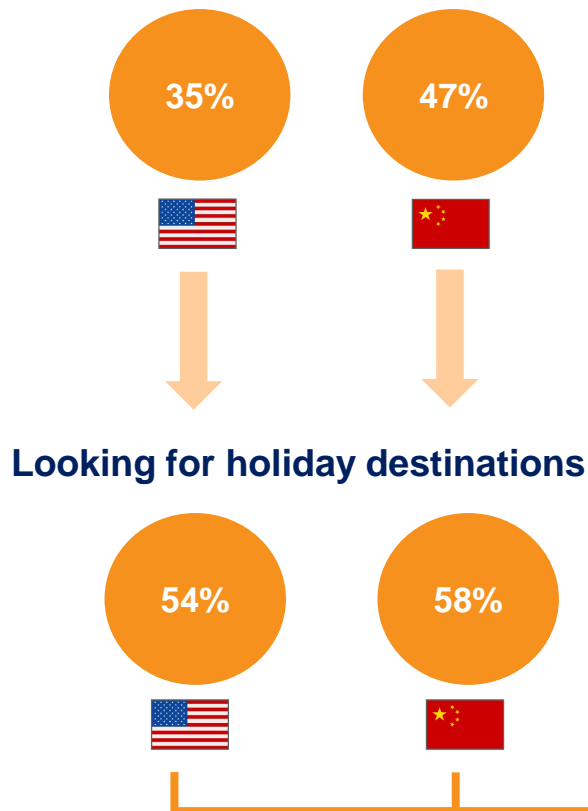




Month of departure:					
February	4%	5%	3%	2%	10%
March	5%	4%	5%	6%	7%
April	8%	7%	4%	6%	11%
May	18%	7%	10%	7%	11%
June	12%	13%	14%	12%	8%
July	15%	32%	20%	15%	21%
August	19%	17%	22%	22%	22%
September	13%	11%	13%	17%	25%
Fourth quarter	5%	4%	7%	14%	3%
Sample	N=137	N=135	N=203	N=176	N=183

Potential holidays (2/2)

Almost half of respondents in China have indicated that they have the intention to go on holiday but they still need to book. Of this group more than half is already looking for holiday destinations. In the United States the group that still needs to book is smaller but even there approximately half has indicated that they are already looking for holiday destinations. May, June and July are the most important months of departure for both countries.

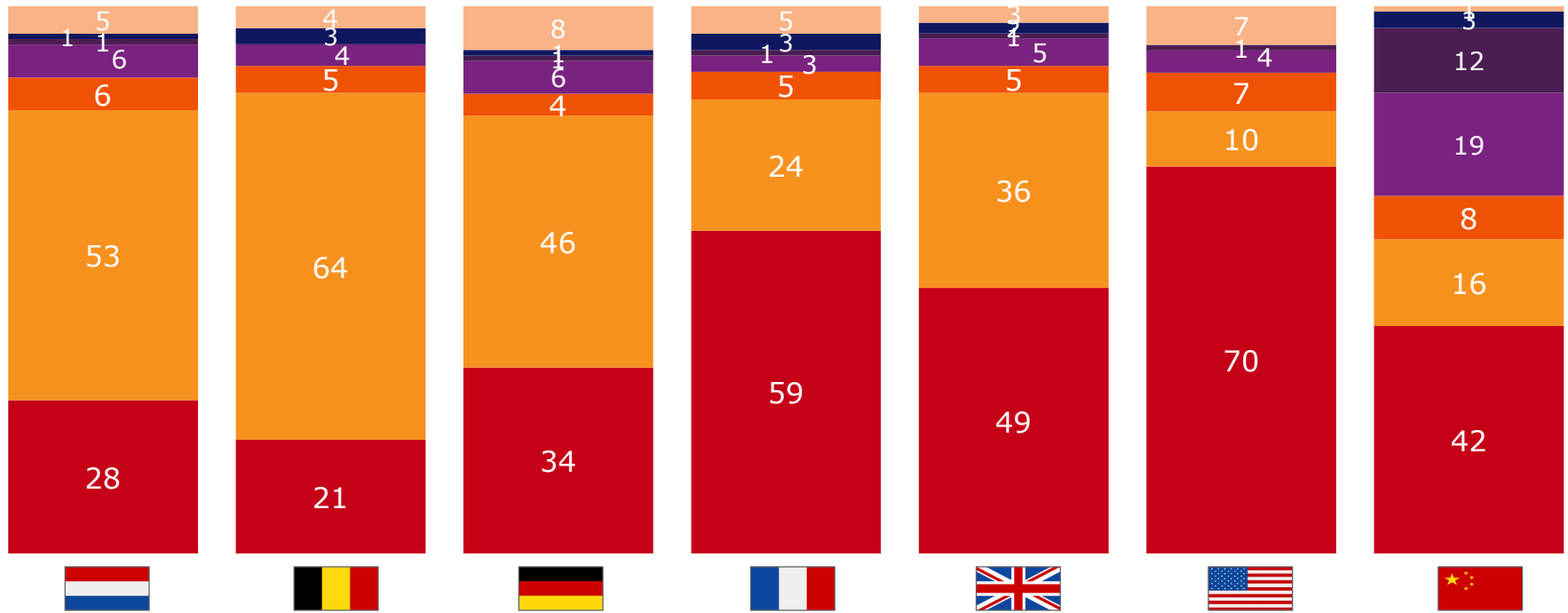
Holiday intention but still need to book



		
Month of departure:		
February	7%	3%
March	8%	5%
April	7%	9%
May	11%	18%
June	20%	24%
July	12%	15%
August	10%	15%
September	12%	9%
Fourth quarter	10%	1%
Sample	N=189	N=78

Region/continent

Dutch people, Germans, and particularly Belgians with holiday plans appear to be hopeful that they will be able to travel to a European destination again for their next holiday. Almost half of them have indicated to have plans for a holiday in Europe. In Belgium this is even two out of three. It is striking to see again that a majority of French respondents have indicated that they will be staying in their own country. The situation in the United States and in the United Kingdom has resulted in the decision of the majority of the respondents to stay in their home country.

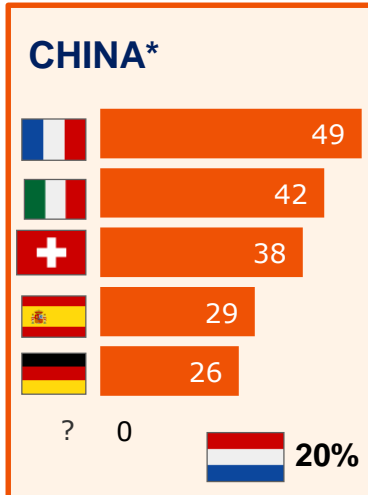
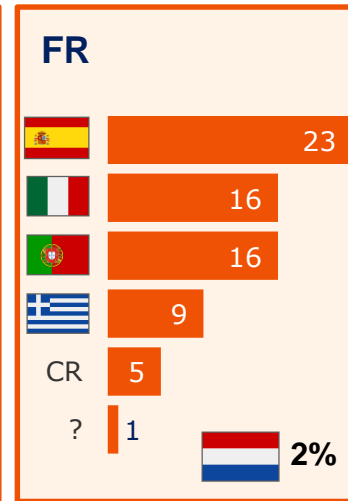
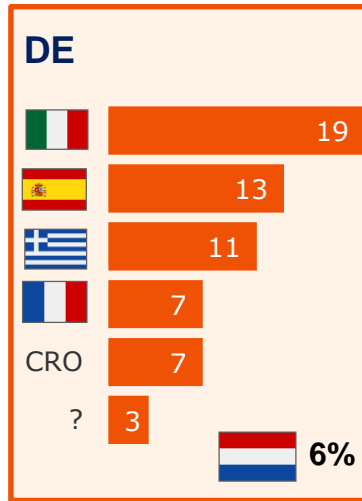
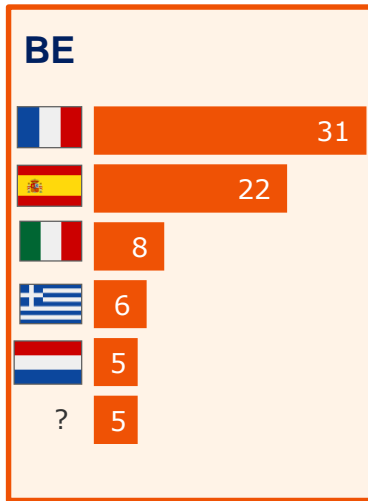
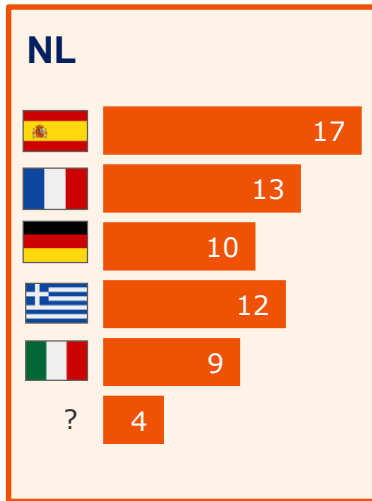


■ Home country
 ■ Europe
 ■ North or South America
 ■ Asia
 ■ Australia/Oceania
 ■ Africa
 ■ I do not know yet

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

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

Top 5 European destinations



- Spain remains the most popular European holiday destination in 2021 as well. Not only among Dutch holidaymakers but also for people from other countries with holiday plans.
- Other countries with a Mediterranean character such as Greece and Italy remain popular, though considerably less so than Spain.
- The position of the Netherlands as a holiday destination for 2021 remains limited. The Netherlands is relatively popular among our neighbours to the south and east: Belgium and Germany. The country's popularity remains limited in the United Kingdom and France.
- Chinese holidaymakers travelling to Europe tend to have multiple destinations. Almost half of Chinese travellers intending to visit Europe want to visit France. Almost one in five also visits the Netherlands.

Based on:
Respondents with holiday plans in a European country

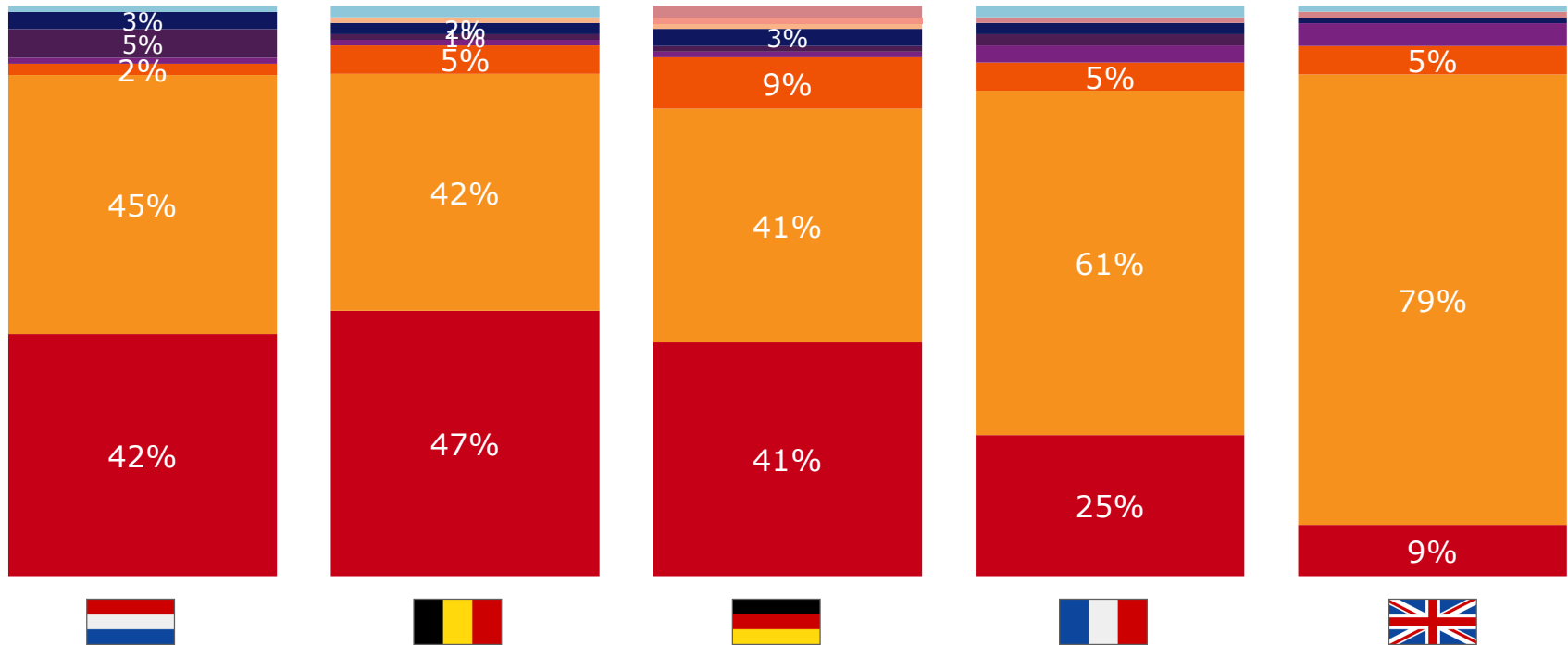
Question:
Where in Europe do you plan to spend the majority of your holiday?

* 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 Dutch people with holiday plans somewhere in Europe.

Belgians tend to prefer to travel by car.



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

Based on:
Respondents with holiday plans in a European country

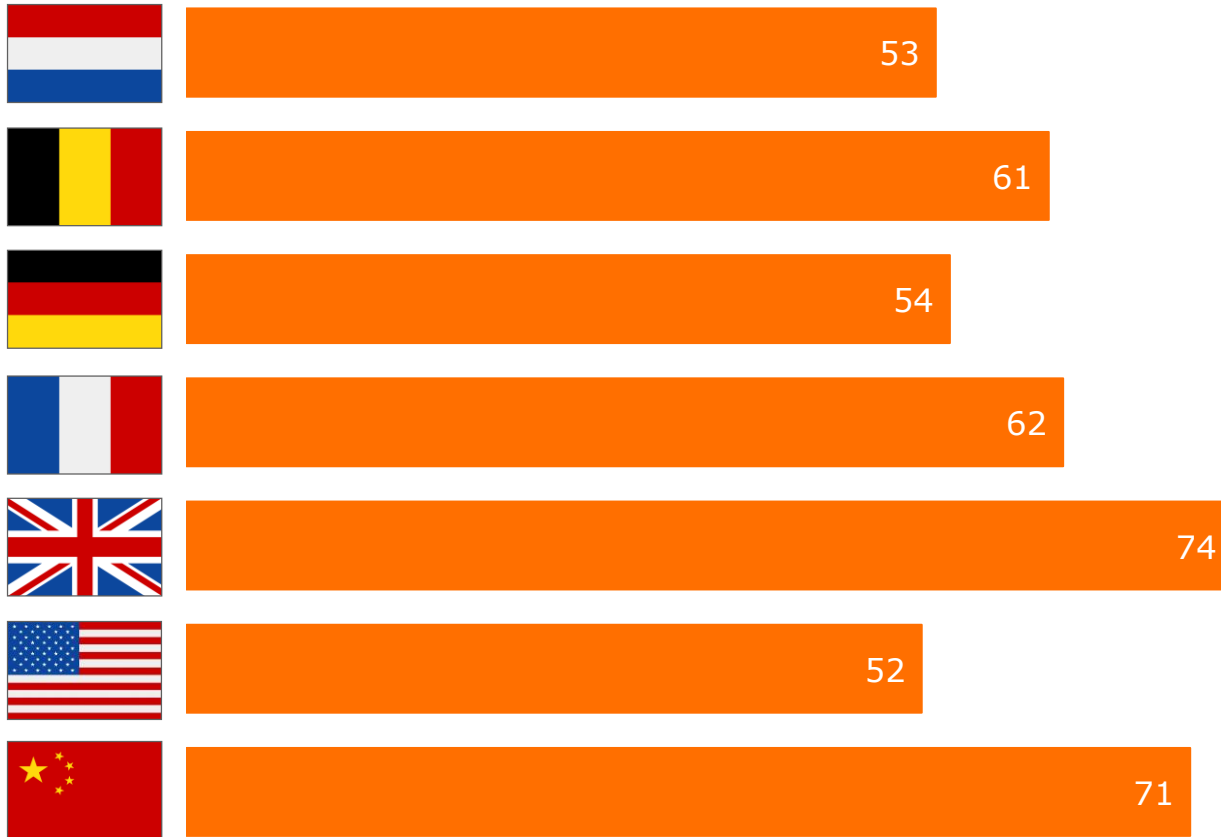
Question:
Which mode of transportation are you planning to take to your holiday destination in Europe?

Influence corona on behaviour



Influence of coronavirus in the event of no holiday plans

The coronavirus outbreak is still having a considerable influence on the decision whether or not to go on holiday. This mainly applies to Brits and Chinese people, among whom approximately three-quarters of respondents have indicated that the coronavirus outbreak has played a considerable part in their decision not to go on holiday this year.

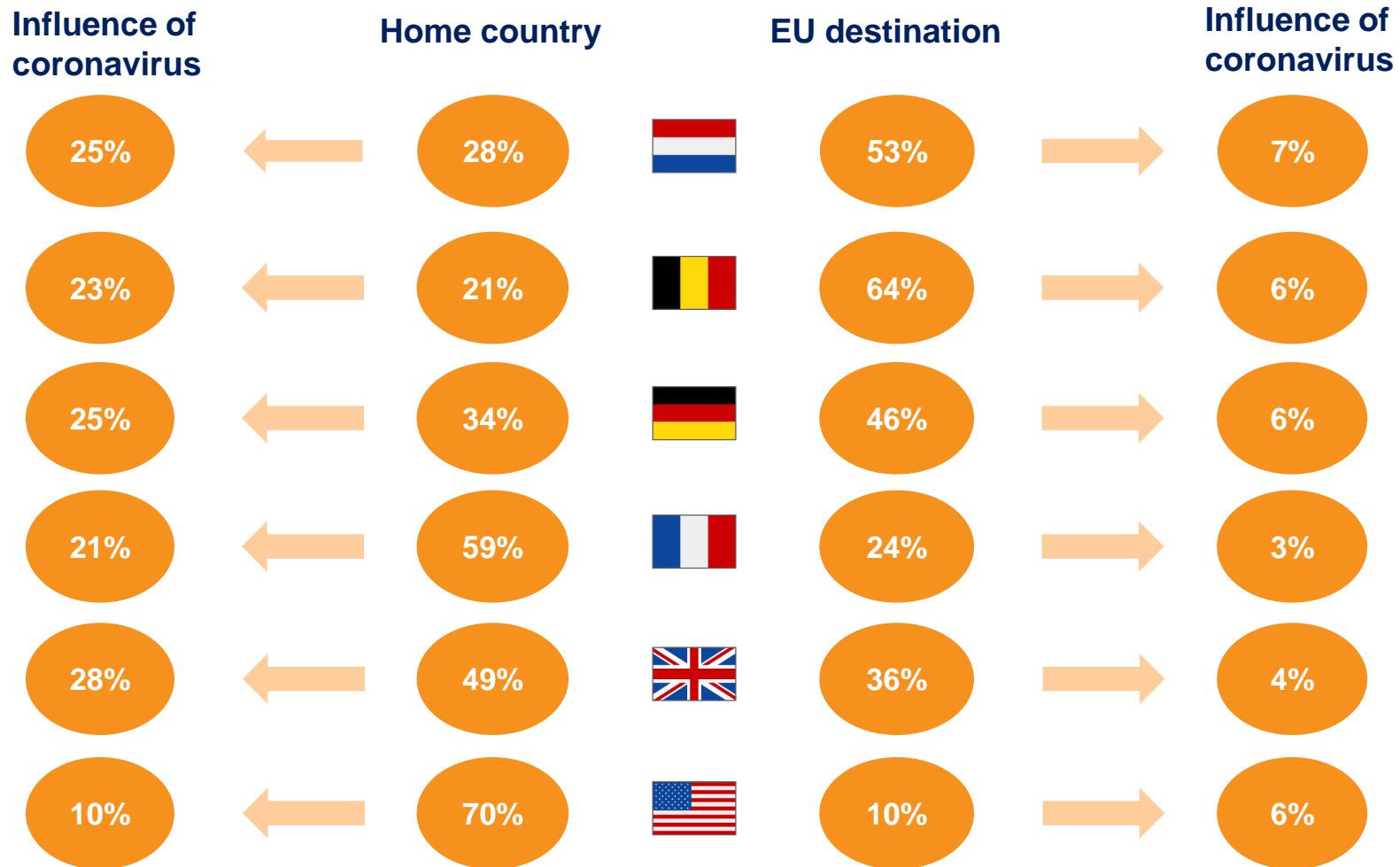


Based on:
People without holiday plans

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 on choice of holiday destination

In the European countries, a quarter of the people has indicated that the decision to stay in their own country is based on the corona outbreak. The choice for a European holiday destination is influenced by the coronavirus outbreak to a very limited extent.



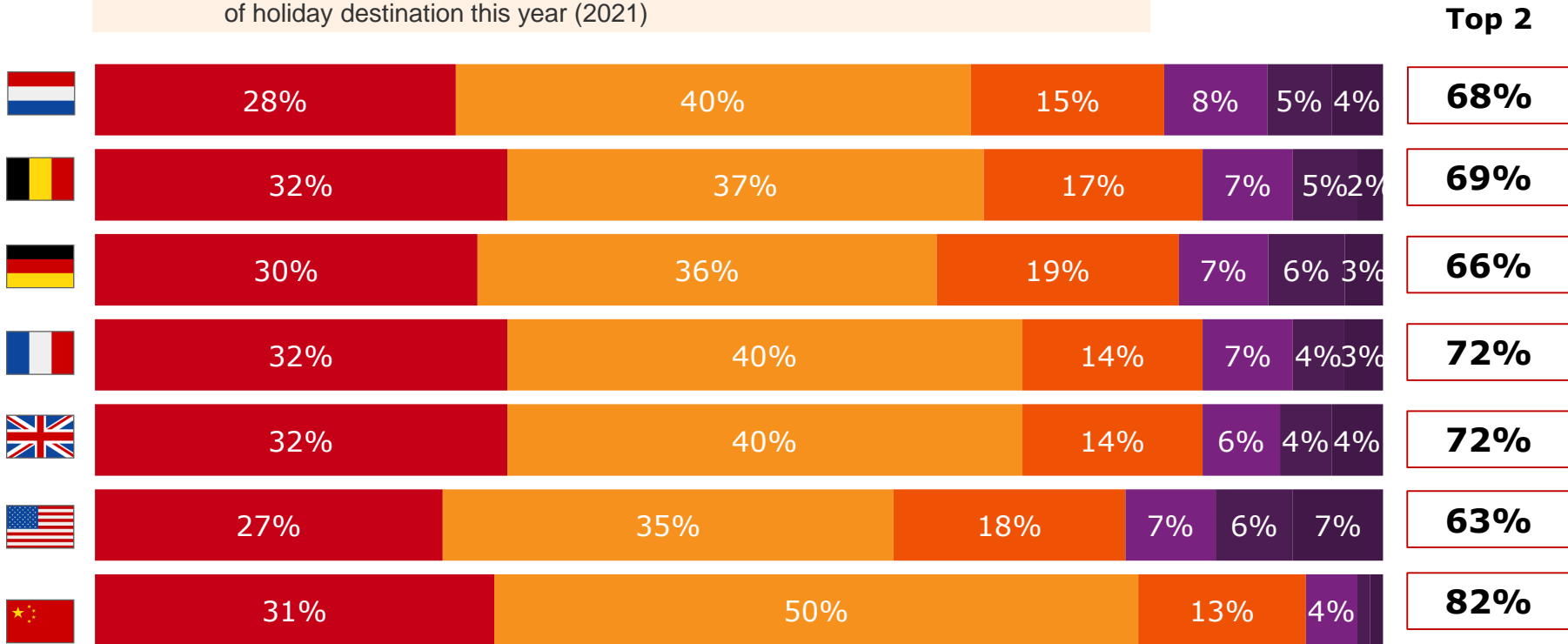
Based on:
People with holiday plans (booked/voucher/still need to book)

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

Influence of coronavirus on choice of holiday destination 2021

The coronavirus pandemic has had a great influence on the choice of holiday destination. Travel restrictions result in limitations but the sentiment with regard to travel also plays a role. Overall, seven out of ten respondents have indicated that the choice of their holiday destination is being influenced by the coronavirus pandemic.

Statement: I expect that the coronavirus outbreak will also have an influence on my choice of holiday destination this year (2021)



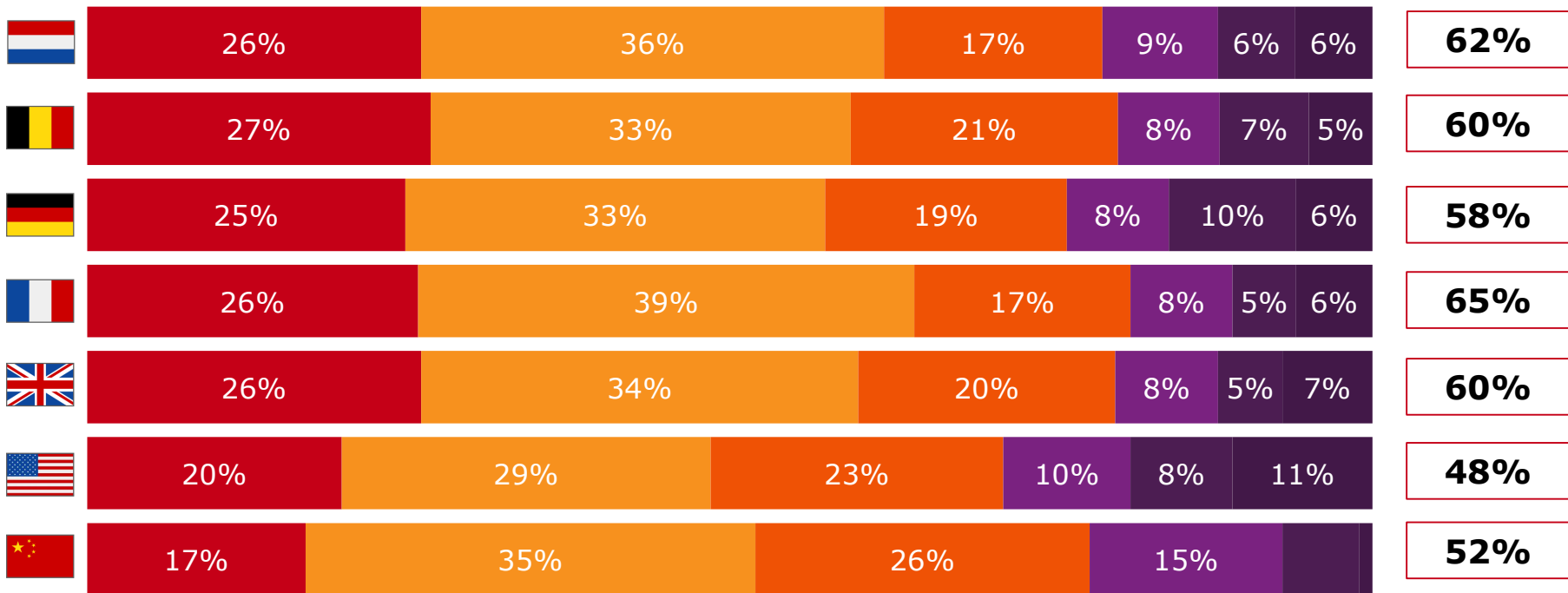
■ Completely agree
 ■ Agree
 ■ Do not agree/disagree
 ■ Disagree
 ■ Completely disagree
 ■ I do not know

Based on:
total sample

Influence of coronavirus on booking behaviour 2021

The coronavirus pandemic results in the fact that people wait longer to book their holidays. Almost six out of ten respondents have indicated that they plan to book their holidays at a later date than usual. As a result, more last-minute bookings can be expected this year.

Statement: Due to the uncertainty caused by the coronavirus outbreak, I will be booking my holiday closer to the date of departure this year (2021).



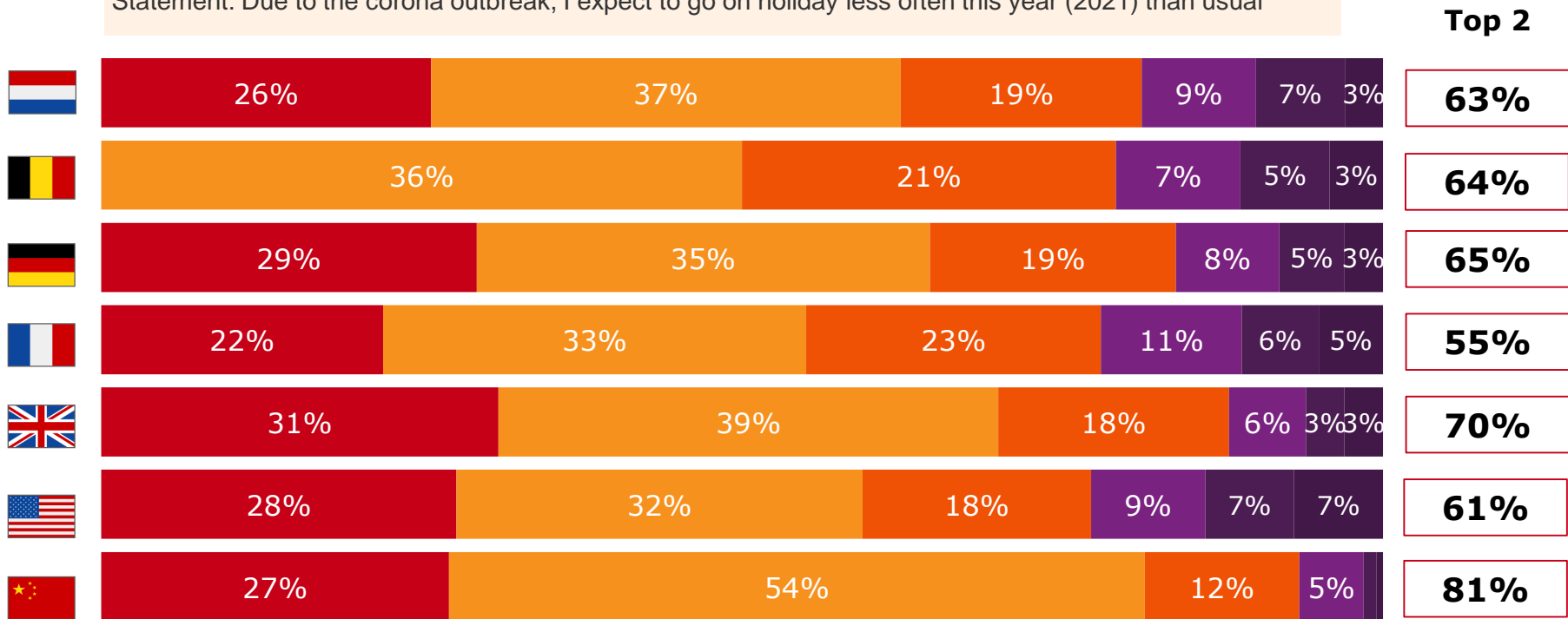
■ Completely agree
 ■ Agree
 ■ Do not agree/disagree
 ■ Disagree
 ■ Completely disagree
 ■ I do not know

Based on:
total sample

Influence of coronavirus on the number of holidays in 2021

In addition to choice of holiday destination and booking behavior, the corona pandemic is clearly also affecting the number of holidays people expect to take. Two-thirds expect to go on holiday less often this year as a result of the corona outbreak.

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



■ Completely agree
 ■ Agree
 ■ Do not agree/disagree
 ■ Disagree
 ■ Completely disagree
 ■ I do not know

Based on:
total sample

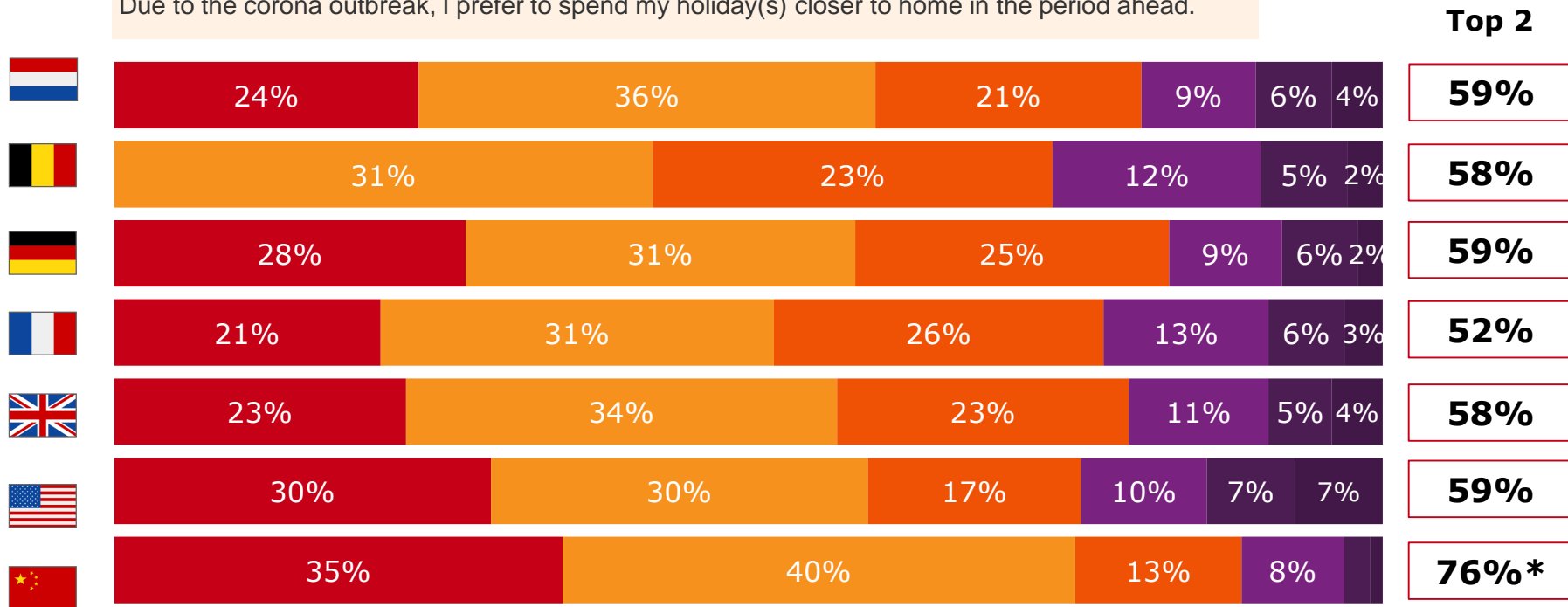
Sentiment



Statement: On holiday closer to home

Although the coronavirus outbreak in China is at a manageable level, over three quarters of Chinese respondents have indicated that they would prefer to spend their holiday in China due to the coronavirus outbreak. In the other countries, almost six out of every ten respondents have indicated that they would prefer to spend their holidays closer to home as a result of the coronavirus outbreak.

Due to the corona outbreak, I prefer to spend my holiday(s) closer to home in the period ahead.



■ Completely agree
 ■ Agree
 ■ Do not agree/disagree
 ■ Disagree
 ■ Completely disagree
 ■ I do not know

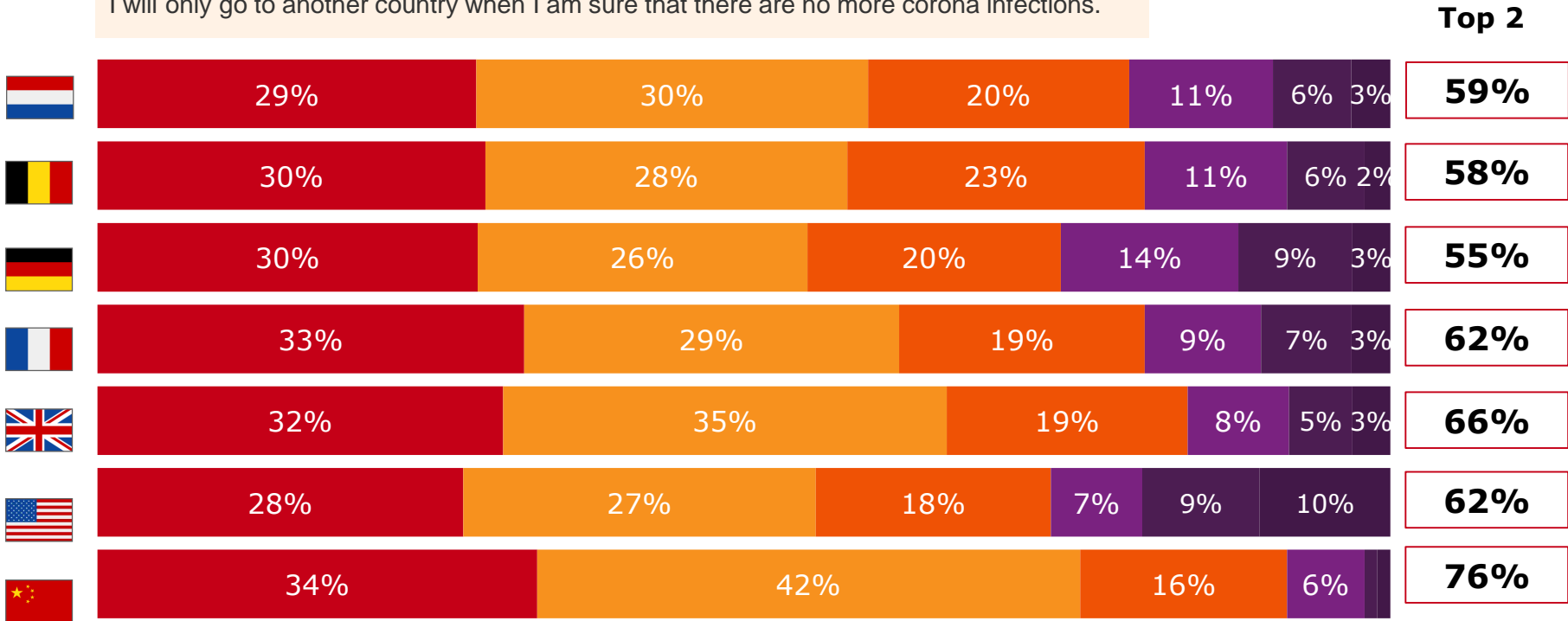
Based on:
total sample

* 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: Travel when there are no infections

Approximately six out of ten respondents have indicated that they will not travel abroad unless they are certain that there are no new coronavirus infections there. Brits and Chinese people in particular seem more restrained than others in this respect.

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



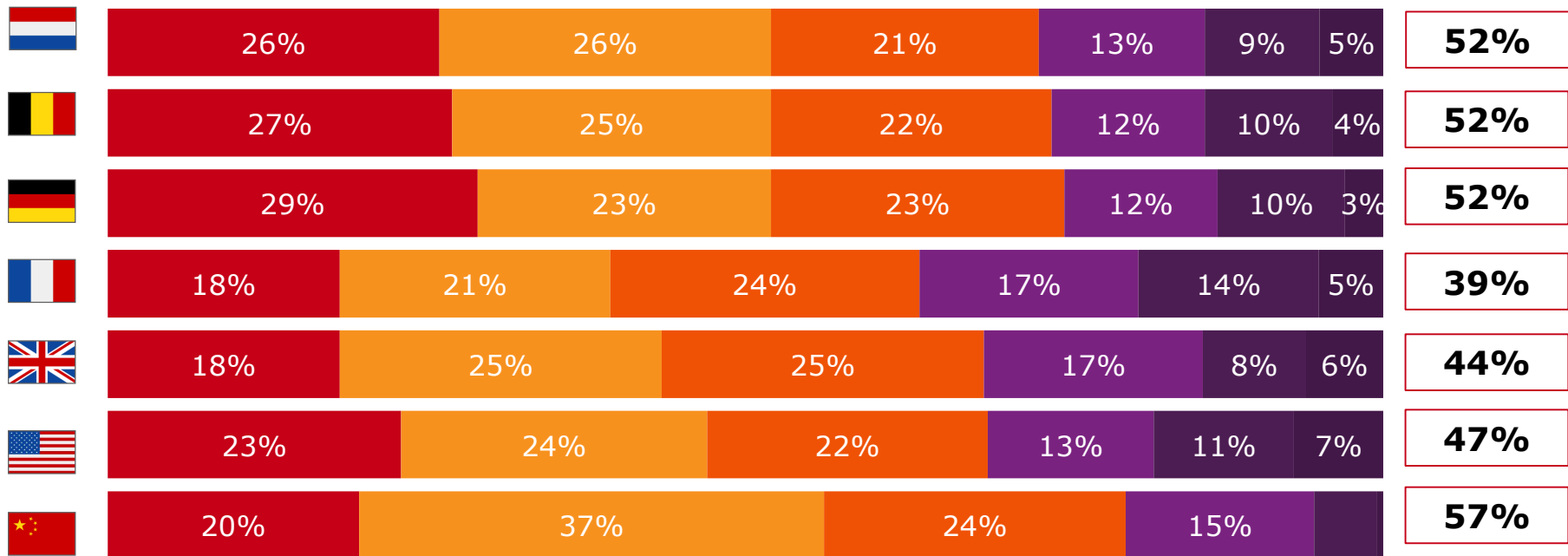
■ Completely agree
 ■ Agree
 ■ Do not agree/disagree
 ■ Disagree
 ■ Completely disagree
 ■ I do not know

Based on:
total sample

Statement: Popularity of air travel

On average, half of respondents have indicated that they are less happy to fly as a result of the coronavirus pandemic. This applies to a lesser extent to Brits, but strikingly also to French people.

Due to the coronavirus outbreak I feel less comfortable flying to my holiday destination.



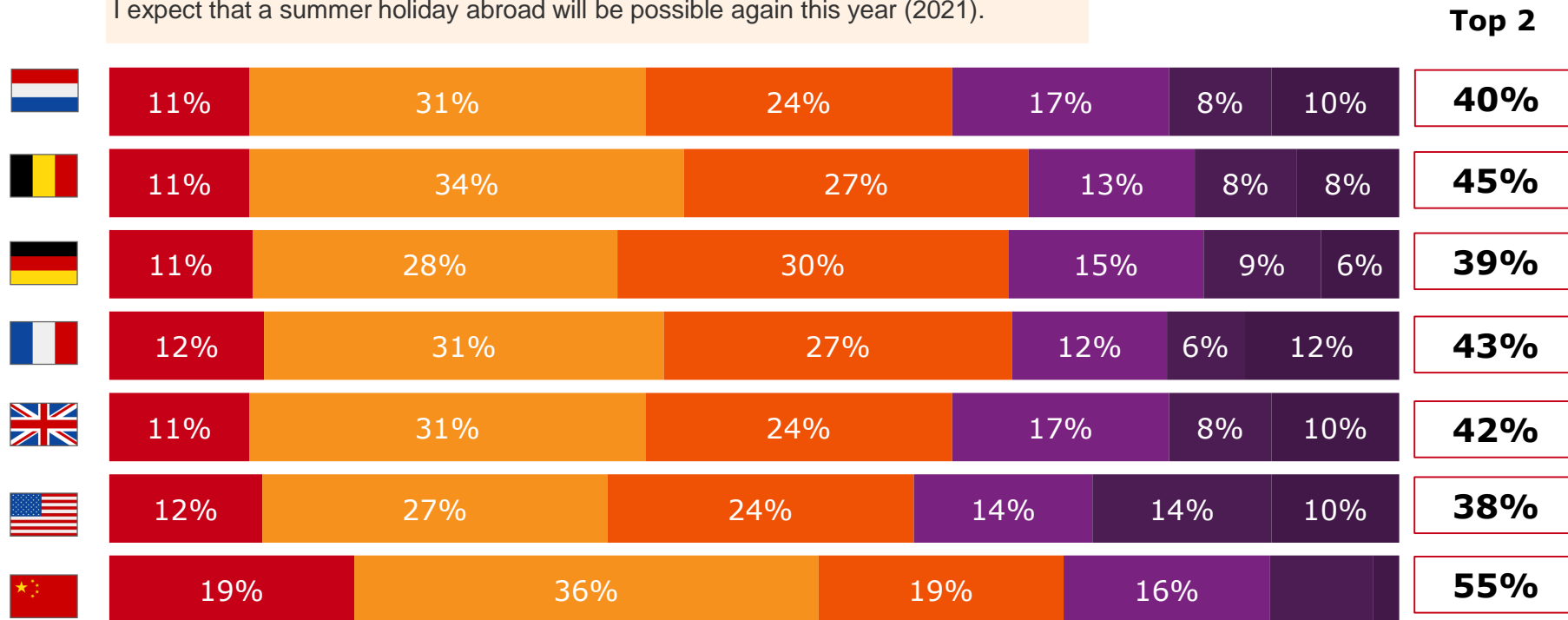
■ Completely agree
 ■ Agree
 ■ Do not agree/disagree
 ■ Disagree
 ■ Completely disagree
 ■ I do not know

Based on:
total sample

Statement: Summer holidays abroad

Although the intention for a summer holiday abroad is high, it seems that most respondents are not really counting on actually being able to go abroad for their summer holidays. Two out of five respondents expect to be able to go abroad this year during the summer holidays. In Germany and China respondents seem more optimistic.

I expect that a summer holiday abroad will be possible again this year (2021).



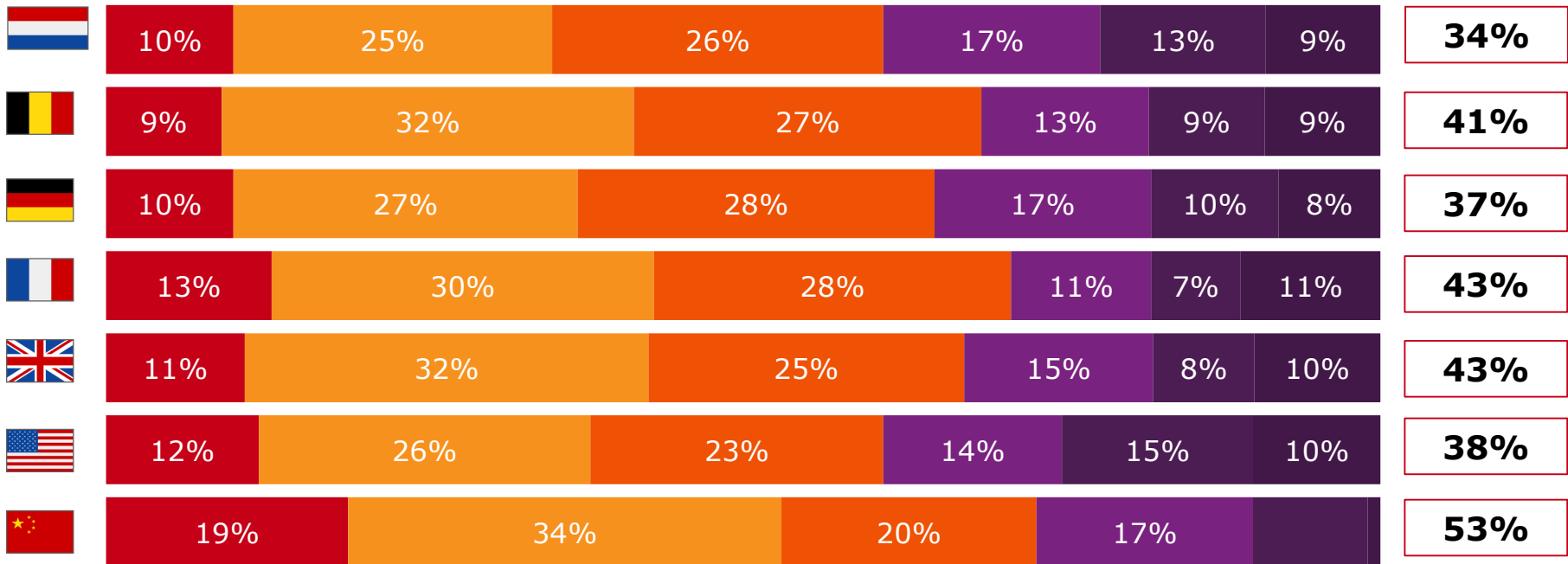
■ Completely agree
 ■ Agree
 ■ Do not agree/disagree
 ■ Disagree
 ■ Completely disagree
 ■ I do not know

Based on:
total sample

Statement: Flying to summer holiday destination

The next step beyond a holiday abroad is flying to a holiday destination abroad. Again, a limited group of people expect that this will be possible in the summer. Dutch and German people are most sceptical about this, followed by Americans.

I expect that flying to a holiday destination abroad will be possible again in the summer holidays this year (2021).



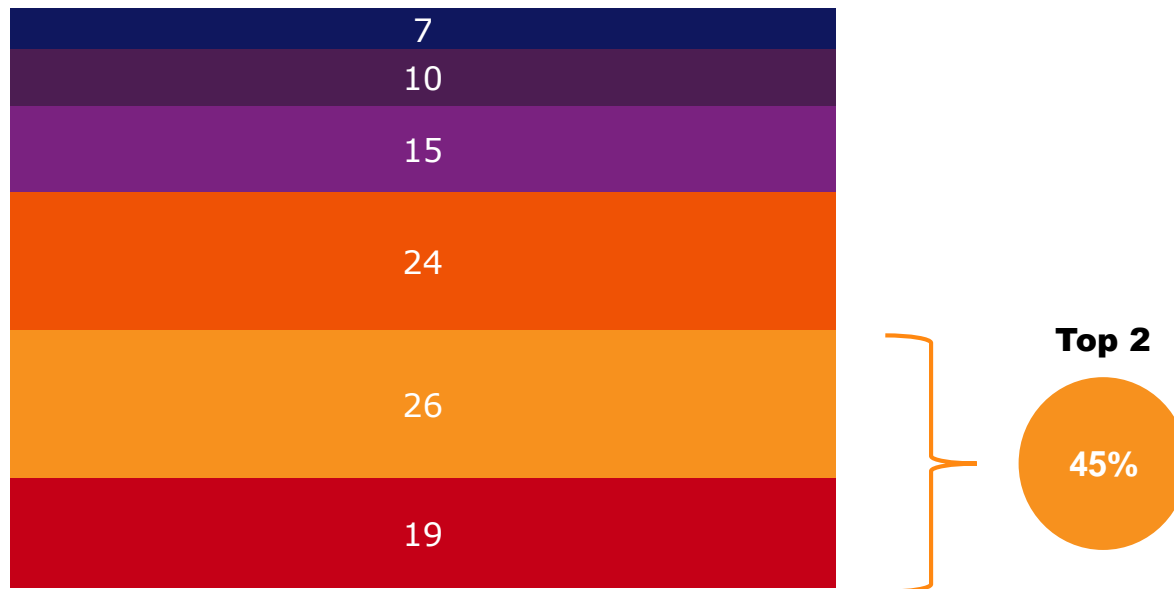
■ Completely agree
 ■ Agree
 ■ Do not agree/disagree
 ■ Disagree
 ■ Completely disagree
 ■ I do not know

Based on:
total sample

Statement: Holiday in the Netherlands

Almost half of all Dutch respondents are considering spending the holidays in their own country this year. This group may grow because a quarter of respondents have given a neutral answer.

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



■ Completely agree ■ Agree ■ Do not agree/disagree ■ Disagree ■ Completely disagree ■ I do not know

Based on:
total sample




Schiphol
Group



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