Markedsinnsikt
1.halvår 2024

Danmark

Nederland

Belgia

Norway

Innovation Norway

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Danmark

- Unge bruger TikTok til at planlægge rejser

- Interessen for dubletdestinationer (kopi destinasjoner) stiger
  - ikke de samme severdigheter man kan oppleve, men at atmosfæren på de to reisemål til en viss grad minner om hverandre, og at alternativene er mindre overfylte og billigere

🇳🇴 Norway

Innovation Norway
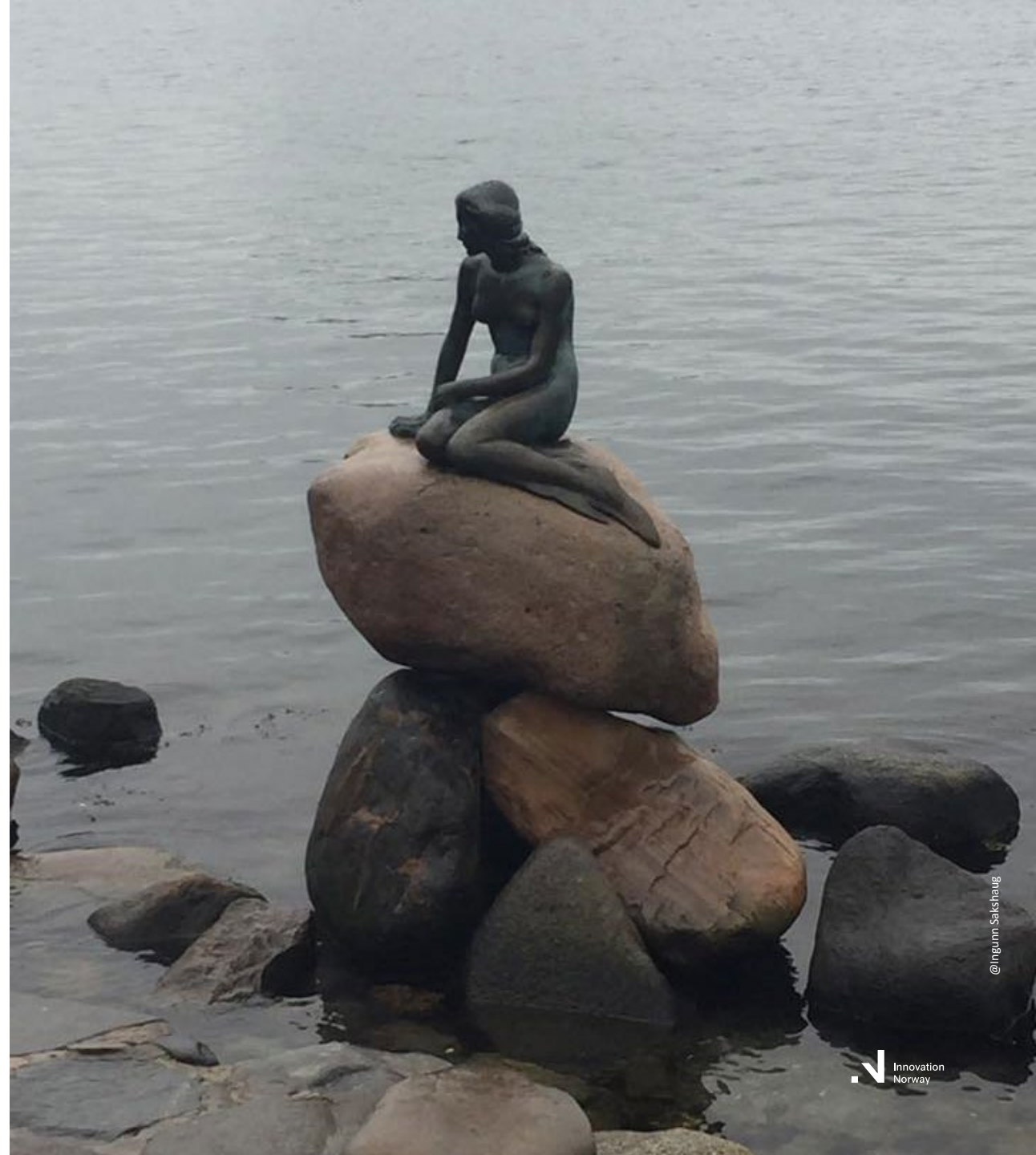
Danmark

Ferie trender

- 60% av danskenes reiseplaner påvirkes ikke av økonomien
- hver 10. vil ta færre utenlandsreiser
- 8% dropper helt utenlandsreiser
- 6% velger billigere reiser
- 6% ferierer i Danmark
- 2% tar kortere ferier

- 13% reiste på vinterferie
- 15% planlegger påskeferie (30% ferierer i Danmark)
  - Tyskland, Frankrike og Spania er topp3
  - Kilde: Europeiske (januar24)

Innovation Norway

Danskernes feriereiser varer i gjennomsnitt ni dager.

Danskene reiser hovedsaklig for å få "opplevelser" (34 prosent), mens ønsket om å "udforske kultur, mad og natur" (27 prosent) er den nest største årsak til å reise. 24 prosent oppgir "avslapning" som hovedformålet, viser undersøkelsen.

The Global Travel Intentions Study

Danmark

Favoritt reisemål

- Når danskerne reiser til utlandet på ferie, er det primært med en destinasjon i Europa som reisemål fremfor andre verdensdeler.
  - Favoritt land: Tyskland, fulgt av Spania, Frankrike, Hellas, Storbritannia, Østerrike, Sverige, Italia, Tyrkia og Norge. (I hvert fall for storforbrukere av det store kredittkort.)
  - Favorittbyer: London, Berlin, Hamborg, Paris, Las Palmas, Brussel, Malaga, Oslo, Praha og Stockholm

Norway

Innovation Norway

Fra reisearrangørene

- en fantastisk vinter 2024 med meget stor vækst

- pr. i dag er vores indsalg til næste vinter 2024/25 på index 200 (altså en fordobling) samt, at vi jobber med ca. 55-60 skolegrupper m.m. til vinter 2025 (største skolegruppe på 540 deltakere).

- Nye destinasjoner bliver interessante: Nesfjellet, Gaustad, Telemark, Sørlandet

- Valuta har litt å si
  ◦ Restaurant/mat i Sverige halve prisen til Norge, så Sverige vinner terreng

- Snøforholdene i Alpene gjør at Norge (og Sverige) nå vinner kampen om gjestene

- Teknologi – Norge er enkelt å booke

- Destinasjonene er ute sammen aktørene og markedsfører seg, da kommer de på kartet

Nederland

"The Dutch made more online purchases last year than in the previous year. The online growth is mainly due to spending on holidays and tickets for attractions and events. Online spending on travel was higher than ever."

- Thuiswinkel.org

Norway

Innovation Norway

Fra operatørene

- we see a drop in the bookings to Norway this summer. Our portfolio with holiday homes was already decreasing but now we also see our roundtrips / flydrives going down. For the 2nd year in row.

- Last year 2023 our roundtrips/flydrives were quite expensive, to be honest. We faced price increases of the hotels from **10-20%** AND we decided to publish city hotels (as our clients sometimes complain that the hotels are in the outskirts of the cities).

- Also, flights and carhire were (and still are) quite expensive.

- Dutch people still book late, but that is a bad situation for Norway (prices go up, capacity go down).

- This year the price increases were a bit less, but still 5-10%. **So I guess that price might have become an issue if we calculate the last 2 summers)** We took out the cityhotels and went back to outskirts, with optional upgrade to citycenter hotel. However the bookings do not come in as we expected.

Norway

Innovation
Norway

Norge vs Skandinavia/Europa

• Rest of Scandinavia:

- Iceland is increasing and extreme popular

- Sweden: we do not have a lot of Sweden anymore, but the roundtrips we have, are hardly booked. I also heard in a Dutch Travel Podcast that Sweden is performing minus 10%.

- Denmark: still going strong.

- Finland: we hardly book Finland, that is no focus destination

• Rest of Europe:

- Germany is doing very well, especially roundtrips in cars

- France, Spain and Italy >> increasing

- Albania (new destination) : booming

- Great Britain/Scotland: increase

- Ireland: about the same as last year

Norway

Innovation Norway

Fra operatørene

- Nedgang i bookinger for sommeren sammenlignet med 2023

- HNL har hatt en god innvirkning på bookingene de to siste årene. Nå som de ikke seiler lenger, påvirker dette bestillingene til Sørlandet, og en gruppe reisende som ikke tar turen til Norge med andre transportmidler

- Tallene for juni er gode, men det er færre som booker i august (familier). Dette kan ha å gjøre med økte overnattingspriser og høyere levekostnader i Nederland

Belgia

- Flandern is the region from where most travelers come from, but there is an increase in travelers also from Wallonia and Brussels to Norway as well.

Fra operatørene

General status update

- In general a solid growth for Norway in all markets.

- People booked earlier this year. A lot of bookings already came on October/November. This is what we had before covid-19 but now 1st time since 2020 that people booked this already.

Trends in the market in travel patterns

- More requests from people who are more on a budget. So, a lot of requests and bookings for cabin round trips instead of hotel round trips.

- Hotel roundtrips June is becoming more popular than August.

- Requests for ski are getting more and more and also earlier. Already making the first bookings for ski 24/25.

- Lots of requests for Lofoten + Fjord Norway, less for Southern Norway (Southern Norway was really good last year, probably because of Holland Norway Line).

- Requests for combinations Norway and Sweden, both people who want to combine Fjord Norway with Sweden as people who want to combine Lofoten with Swedish and Finnish Lapland.
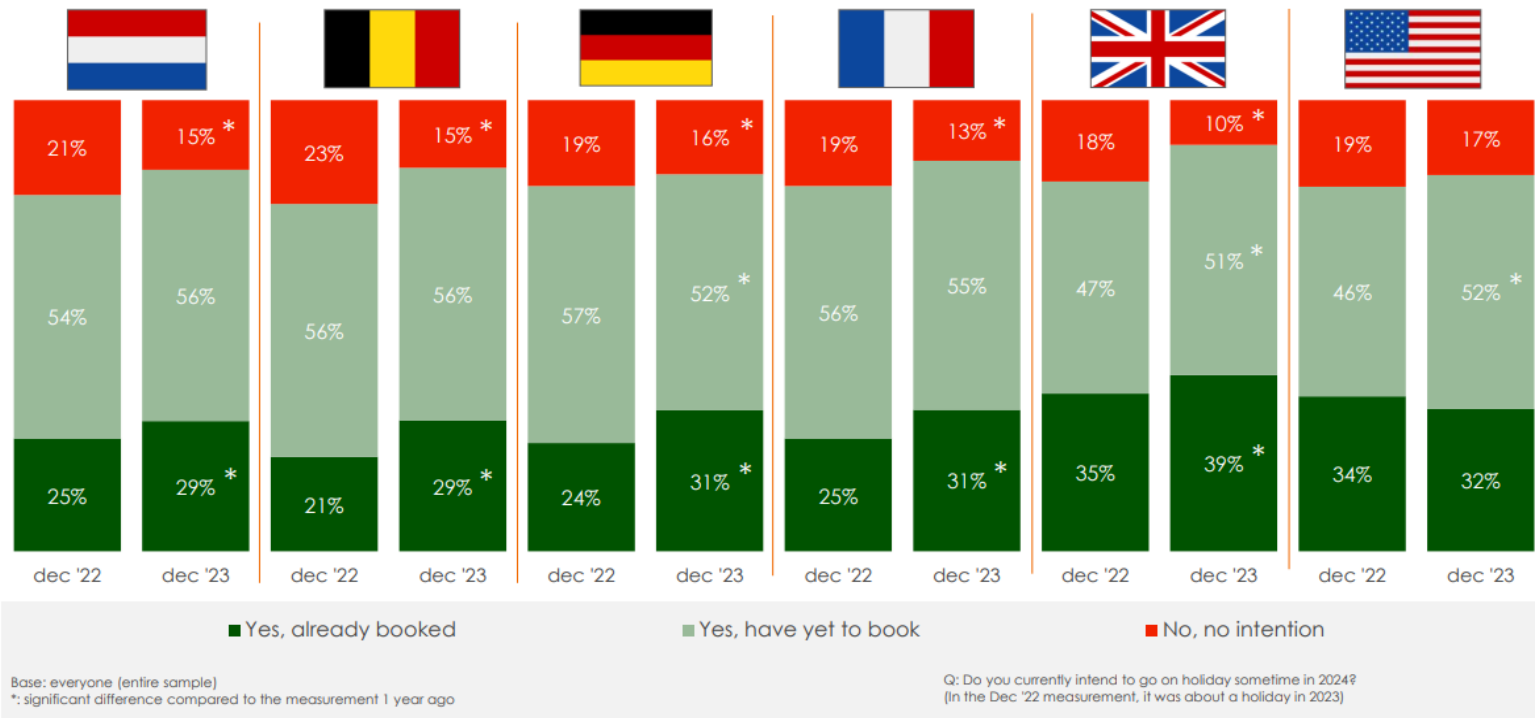
Financial situation in the market

- Same as above (more requests from people who are more on a budget. So, a lot of requests and bookings for cabin round trips instead of hotel round trips).

Norway

Innovation Norway
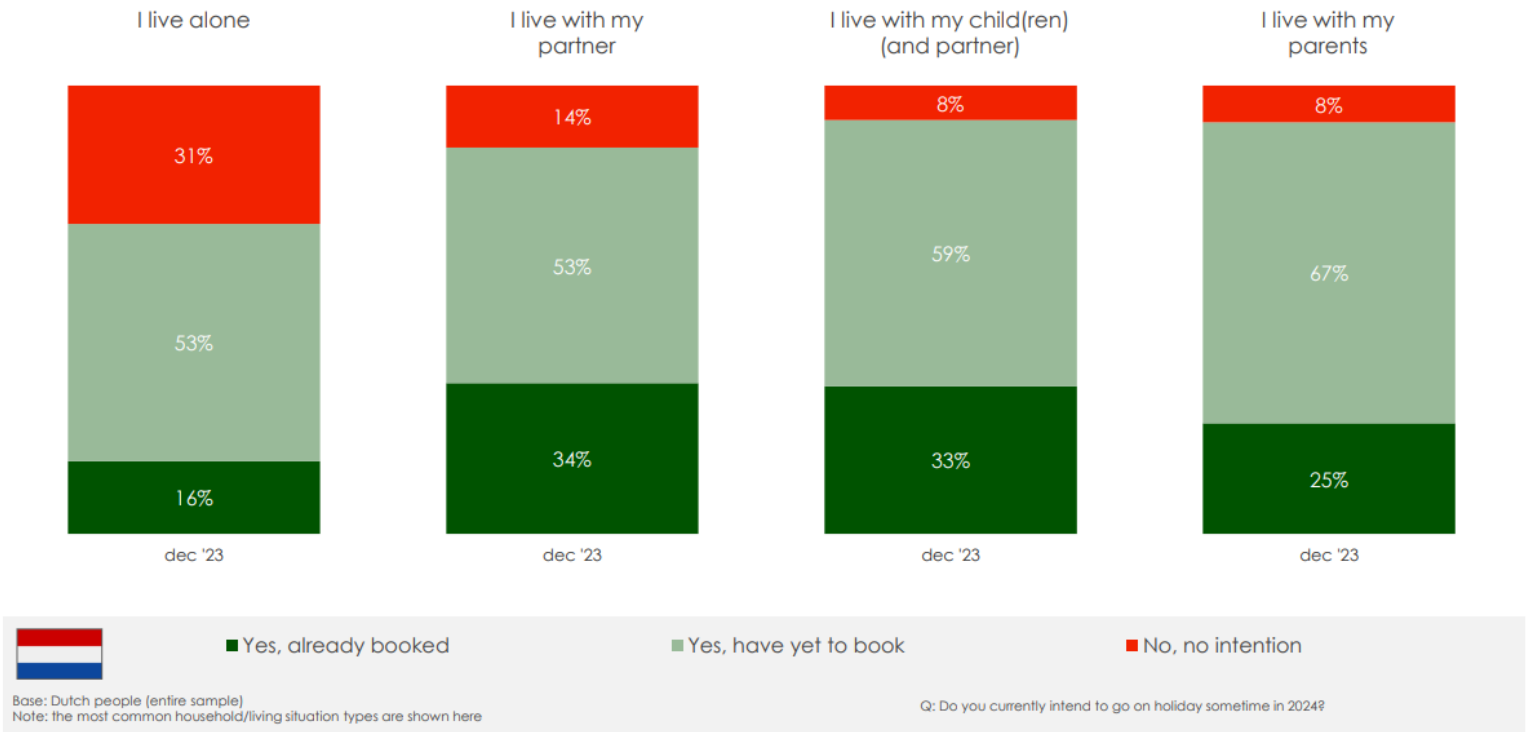
Holiday intention

On average, 32% have already booked a holiday for 2024. This is a higher percentage than a year ago, when it was 27%. The British currently have the highest proportion 'already booked' (39%). Among the Dutch and Belgians, this share is lowest (both 29%).

	dec '22	dec '23
🇳🇱 No, no intention	21%	15% *
Yes, have yet to book	54%	56%
Yes, already booked	25%	29% *

	dec '22	dec '23
🇧🇪 No, no intention	23%	15% *
Yes, have yet to book	56%	56%
Yes, already booked	21%	29% *

	dec '22	dec '23
🇩🇪 No, no intention	19%	16% *
Yes, have yet to book	57%	52% *
Yes, already booked	24%	31% *

	dec '22	dec '23
🇫🇷 No, no intention	19%	13% *
Yes, have yet to book	56%	55%
Yes, already booked	25%	31% *

	dec '22	dec '23
🇬🇧 No, no intention	18%	10% *
Yes, have yet to book	47%	51% *
Yes, already booked	35%	39% *

	dec '22	dec '23
🇺🇸 No, no intention	19%	17%
Yes, have yet to book	46%	52% *
Yes, already booked	34%	32%

■ Yes, already booked   ■ Yes, have yet to book   ■ No, no intention

Base: everyone (entire sample)
*: significant difference compared to the measurement 1 year ago

Q: Do you currently intend to go on holiday sometime in 2024?
(In the Dec '22 measurement, it was about a holiday in 2023)

Kilde: Nederlands Bureau voor Toerisme & Congressen (NBTC)
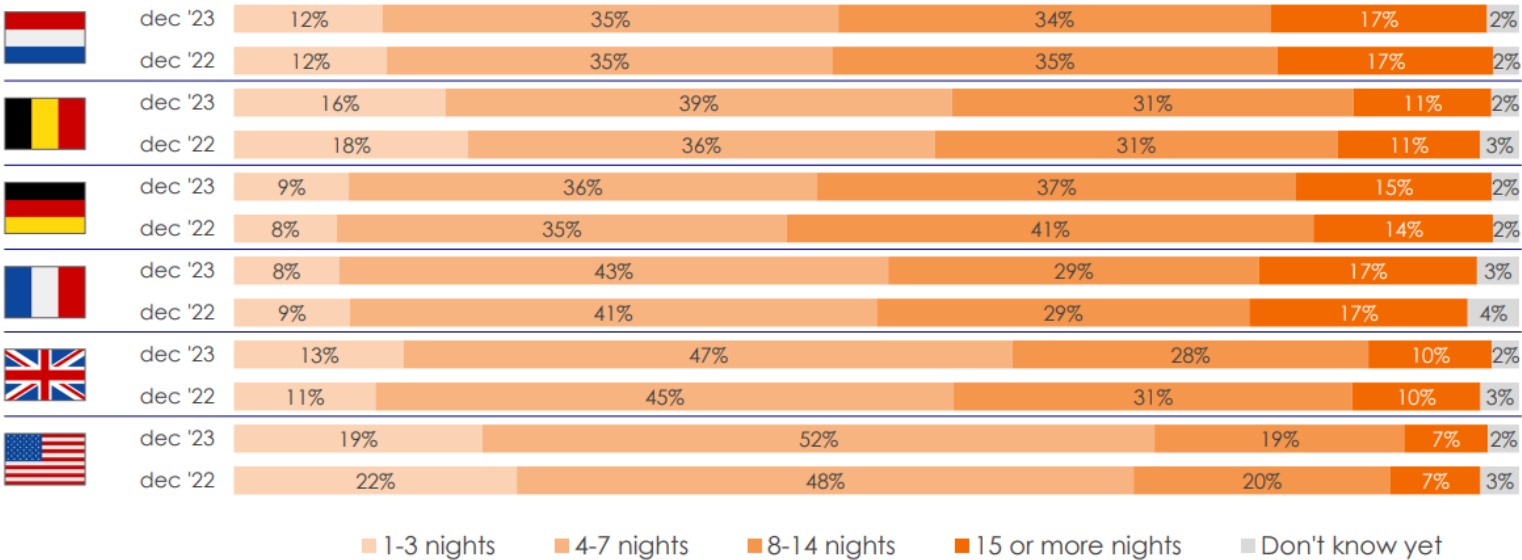
Holiday intention vs living situation

Among the Dutch, the group 'I live with my partner' has booked 2024 holidays to the highest extent (34%). The group living with child(ren) (and partner) follows close behind (33%). Dutch people living alone have the least holiday plans, with 31% having no holiday intention for 2024 yet.

I live alone	I live with my partner	I live with my child(ren) (and partner)	I live with my parents
31%	14%	8%	8%
53%	53%	59%	67%
16%	34%	33%	25%
dec '23	dec '23	dec '23	dec '23

■ Yes, already booked   ■ Yes, have yet to book   ■ No, no intention

Base: Dutch people (entire sample)
Note: the most common household/living situation types are shown here

Q: Do you currently intend to go on holiday sometime in 2024?

Norway

Holiday intention vs living situation (NL)

Innovation Norway

Nederland/Belgia

Number of nights

On average, the majority of those surveyed with a holiday intention will go away for 4-7 nights for their next holiday (average 42%). After that, the 8-14 nights category is the most chosen (averaging 30%). A year ago, this was a similar pattern. Among Americans, the proportion of short holidays is highest compared to other countries; 19% go away for 1-3 nights.

		1-3 nights	4-7 nights	8-14 nights	15 or more nights	Don't know yet
🇳🇱	dec '23	12%	35%	34%	17%	2%
	dec '22	12%	35%	35%	17%	2%
🇧🇪	dec '23	16%	39%	31%	11%	2%
	dec '22	18%	36%	31%	11%	3%
🇩🇪	dec '23	9%	36%	37%	15%	2%
	dec '22	8%	35%	41%	14%	2%
🇫🇷	dec '23	8%	43%	29%	17%	3%
	dec '22	9%	41%	29%	17%	4%
🇬🇧	dec '23	13%	47%	28%	10%	2%
	dec '22	11%	45%	31%	10%	3%
🇺🇸	dec '23	19%	52%	19%	7%	2%
	dec '22	22%	48%	20%	7%	3%

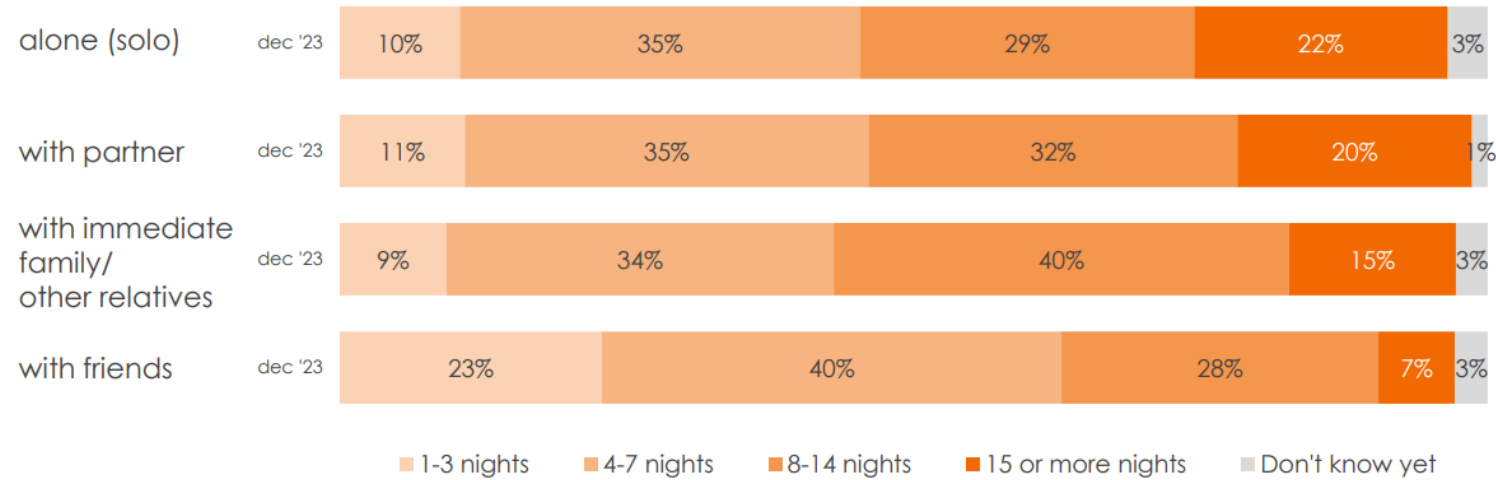■ 1-3 nights ■ 4-7 nights ■ 8-14 nights ■ 15 or more nights ■ Don't know yet

Base: People with holiday plans for 2024 (booked or yet to book) (the measurement a year ago asked about 2023)

Q: How long do you plan to be away on your next holiday (in 2024)?

Nederland

Gjestedøgn vs reisefølge

When holidaying with friends, the proportion of shorter holidays is relatively high. A holiday of 15 nights or more is currently most often planned by Dutch people travelling alone (22%). For holidays with immediate family/other relatives, people most often choose holidays of 8-14 nights.

		1-3 nights	4-7 nights	8-14 nights	15 or more nights	Don't know yet
alone (solo)	dec '23	10%	35%	29%	22%	3%
with partner	dec '23	11%	35%	32%	20%	1%
with immediate family/ other relatives	dec '23	9%	34%	40%	15%	3%
with friends	dec '23	23%	40%	28%	7%	3%

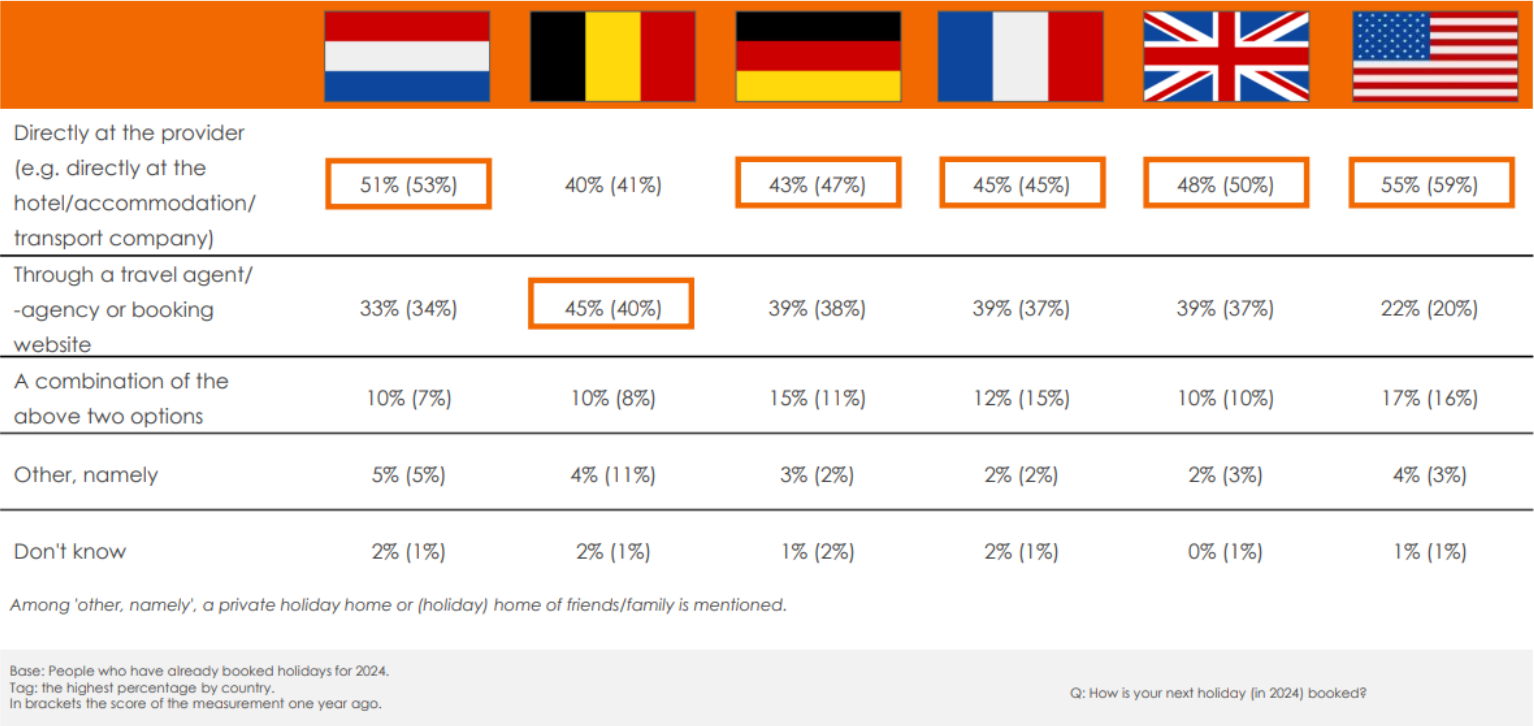■ 1-3 nights ■ 4-7 nights ■ 8-14 nights ■ 15 or more nights ■ Don't know yet

Base: People with holiday plans for 2024 (booked or yet to book)
Note: the most common travel company types are shown here

Q: How long do you plan to be away on your next holiday (in 2024)?

Norway

Number of nights vs. travel companion (NL)

Innovation Norway

Nederland/Belgia

Bookingmønster

Overall, most bookings for 2024 were made directly with the provider (47% on average). A year ago, this was 50% on average. Most Americans who have already booked a holiday say they did so directly with the provider (55%). Belgians most often book through a travel organisation/booking website (45%).
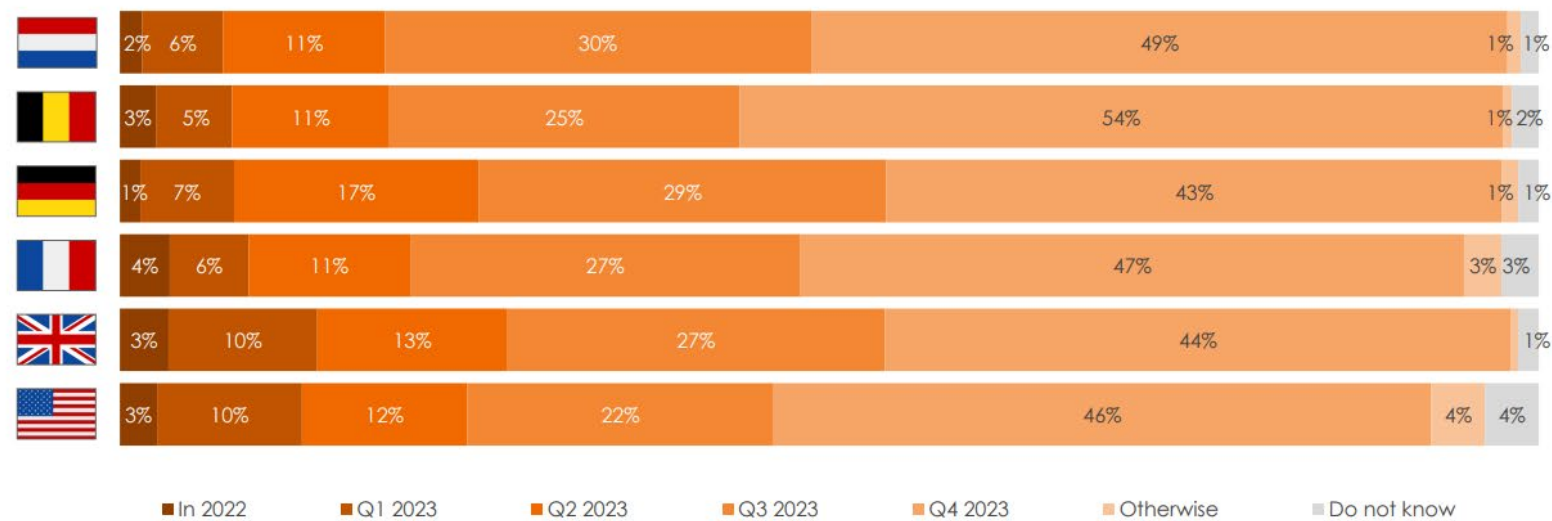
	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Directly at the provider (e.g. directly at the hotel/accommodation/ transport company)	51% (53%)	40% (41%)	43% (47%)	45% (45%)	48% (50%)	55% (59%)
Through a travel agent/ -agency or booking website	33% (34%)	45% (40%)	39% (38%)	39% (37%)	39% (37%)	22% (20%)
A combination of the above two options	10% (7%)	10% (8%)	15% (11%)	12% (15%)	10% (10%)	17% (16%)
Other, namely	5% (5%)	4% (11%)	3% (2%)	2% (2%)	2% (3%)	4% (3%)
Don't know	2% (1%)	2% (1%)	1% (2%)	2% (1%)	0% (1%)	1% (1%)

Among 'other, namely', a private holiday home or (holiday) home of friends/family is mentioned.

Base: People who have already booked holidays for 2024.
Tag: the highest percentage by country.
In brackets the score of the measurement one year ago.

Q: How is your next holiday (in 2024) booked?

🇳🇴 Norway

How booked

Når booker de?

Of those who have already booked holidays for 2024, the largest group did so in Oct/Nov/Dec 2023 (47% on average). An average of 27% also booked in Q3 2023 (July/Aug/Sept).
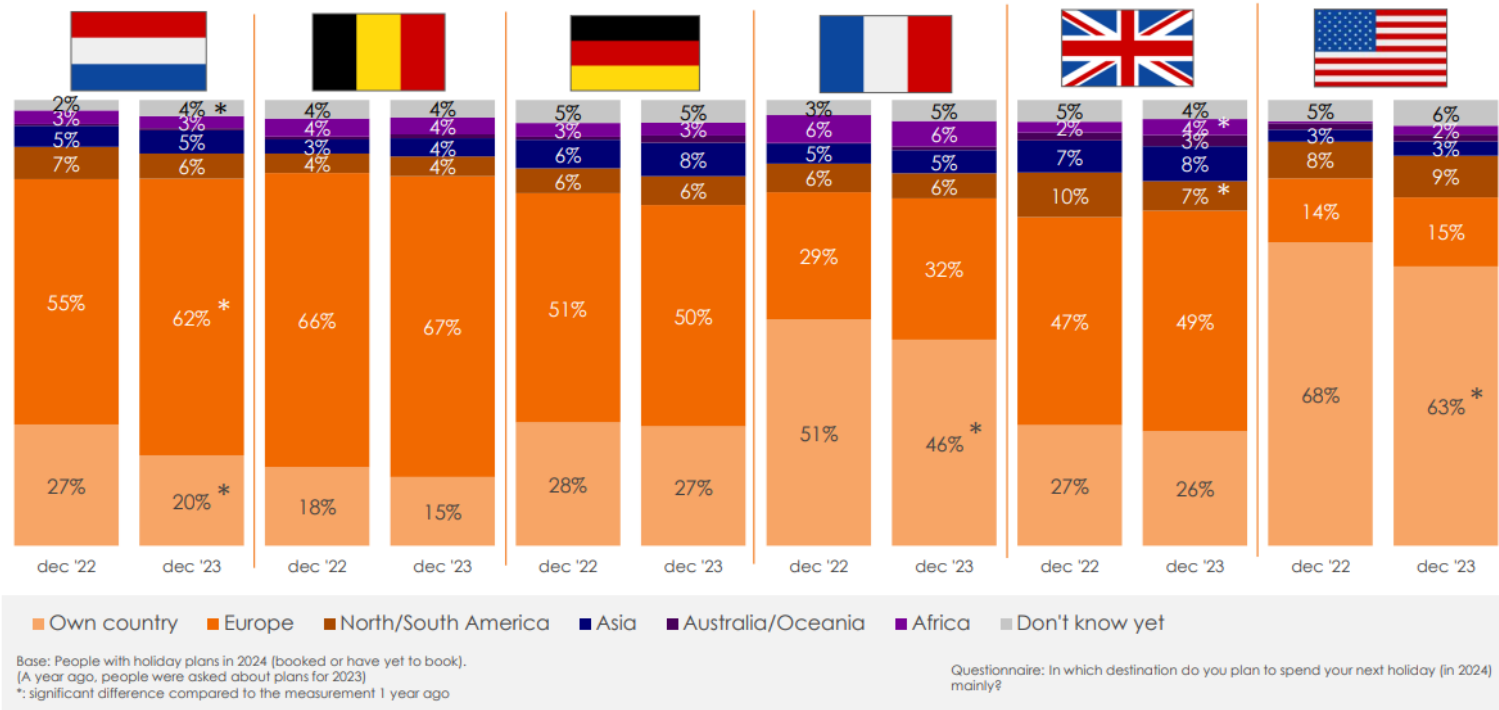
Flag	In 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Otherwise	Do not know
🇳🇱	2%	6%	11%	30%	49%	1%	1%
🇧🇪	3%	5%	11%	25%	54%	1%	2%
🇩🇪	1%	7%	17%	29%	43%	1%	1%
🇫🇷	4%	6%	11%	27%	47%	3%	3%
🇬🇧	3%	10%	13%	27%	44%		1%
🇺🇸	3%	10%	12%	22%	46%	4%	4%

■ In 2022 ■ Q1 2023 ■ Q2 2023 ■ Q3 2023 ■ Q4 2023 ■ Otherwise ■ Do not know

Base: People who have already booked a holiday for 2024

Q: When did you book your next holiday?

Norway

Booking period of holidays already booked

Innovation Norway

14

Nederland/Belgia

Hvor vil de reise?

In 2024, the Dutch plan to spend their next holiday in their own country less than they did a year ago. This is also true for the French and Americans. Most Dutch and Belgians plan to spend their next holiday (elsewhere) in Europe. However, many French and American respondents are planning to holiday in their own country.

Base: People with holiday plans in 2024 (booked or have yet to book).
(A year ago, people were asked about plans for 2023)
*: significant difference compared to the measurement 1 year ago

Questionnaire: In which destination do you plan to spend your next holiday (in 2024) mainly?

Legend: Own country | Europe | North/South America | Asia | Australia/Oceania | Africa | Don't know yet

Nederland/Belgia

Type ferie

Beach holidays are the most frequently planned (average 23%). This is followed by holidays with friends/family (13%), nature holidays (11%) and city trips (9%). Additionally, for the Dutch, a touring holiday has a relatively high score and for Americans, a cruise.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Winter sports holiday	4%	3%	2%	6%	1%	1%
Beach holiday	18%	23%	26%	25%	24%	18%
Water sports holiday	1%	0%	1%	1%	1%	0%
Walking holiday	4%	7%	4%	2%	2%	2%
Cycling holiday	2%	1%	1%	0%	0%	0%
Other type of active holiday	2%	2%	1%	2%	3%	3%
Tour	7%	5%	6%	2%	4%	3%
Cruise	1%	1%	2%	1%	4%	9%
Visiting event	2%	2%	1%	2%	4%	4%
City break	10%	7%	12%	8%	12%	7%
Cultural holidays	6%	9%	6%	9%	5%	5%
Visiting friends/family/etc	6%	6%	7%	7%	9%	14%
Nature holiday	11%	13%	16%	15%	5%	7%
Wellness holidays	4%	3%	5%	1%	3%	3%
Holidays with friends/family/etc	13%	11%	2%	13%	18%	17%
Culinary holidays	1%	2%	2%	1%	1%	1%
Shopping holiday	1%	1%	2%	2%	1%	2%
Volunteer	0%	0%	0%	1%	0%	1%
Otherwise	5%	3%	3%	2%	4%	3%

Base: People with holiday plans for 2024 (booked or yet to book)
Highlight: 5 highest scores per country

Q: How would you characterise your next holiday?

Nederland/Belgia

Type bosted

A hotel/guesthouse is the most popular type of accommodation (average 48%). This is followed by an apartment (average 12%) and renting accommodation from a private person (average 8%). Renting from private individuals is most popular among the French. Among the Dutch, a bungalow (park) and camping score fairly high.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Hotel/guesthouse	43%	48%	52%	35%	52%	57%
Bed and breakfast	4%	7%	4%	7%	6%	4%
Apartment	14%	12%	20%	12%	9%	2%
Bungalow(park)	10%	6%	2%	6%	2%	0%
Campsite	9%	5%	4%	9%	3%	4%
Group accommodation	2%	1%	1%	1%	1%	1%
With a private individual (e.g. Airbnb)	6%	7%	4%	14%	9%	9%
Boat	1%	1%	2%	1%	2%	5%
Second home	1%	2%	1%	3%	1%	1%
Residence of family/friends/other relatives	5%	7%	6%	8%	9%	10%
Other	2%	1%	1%	1%	3%	2%

Base: People with holiday plans for 2024 (booked or yet to book)
Highlight: 3 highest scores per country

Questionnaire: What type of accommodation do you plan to stay in during your next holiday in 2024?

Kilde: Nederlands Bureau voor Toerisme & Congressen (NBTC)

Innovation Norway

Avgjørende for valg av reisemål

On average, flexible cancellation conditions matter most when choosing a holiday destination (on average 72% consider this (very) important). This is followed closely by the aspect of 'staying in a quiet place' (average 71%) and then 'rising prices' (average 65%). For the Dutch, the importance of flexible cancellation conditions is a lot lower than for the other countries.

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Flexible cancellation conditions	**63%**	**69%**	**77%**	**77%**	**71%**	**73%**
Destination close to home	27%	36%	40%	41%	29%	34%
Stay in quiet place	**67%**	**78%**	**74%**	**83%**	**58%**	**67%**
Development of the war in Ukraine	32%	41%	41%	44%	38%	36%
Development of the conflict in Israel and Palestinian territories	31%	42%	43%	47%	39%	39%
Rising prices (fuel, energy, inflation)	**52%**	**65%**	**66%**	**77%**	**61%**	**69%**
Crowds at airports	39%	39%	43%	47%	47%	48%
Sustainability (minimising environmental impact)	40%	50%	52%	58%	47%	46%

Base: People with holiday plans for 2024 (booked or yet to book).
Percentage: top 2 (very important + important).
Highlighting: the three highest scores of each country are in bold.

Question: How important are these aspects to you in your holiday destination choice?

Kilde: Nederlands Bureau voor Toerisme & Congressen (NBTC)

Nederland/Belgia

Hovedferie tidspunkt

People with a holiday intention in 2024 expect to spend their longest holiday of the year mostly in July and August (19% and 18% respectively). Among Americans, June is the departure month most often chosen for the longest holiday.
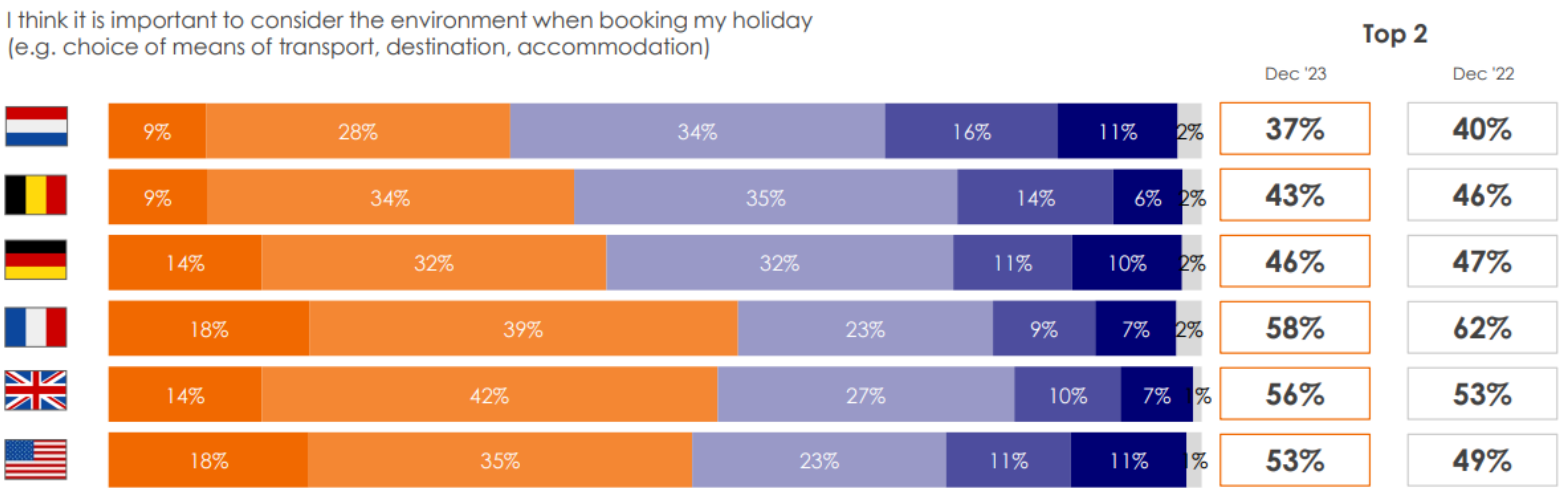
	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
January	2%	2%	2%	2%	3%	5%
February	3%	3%	3%	3%	3%	8%
March	4%	4%	3%	3%	4%	7%
April	5%	6%	7%	5%	6%	10%
May	12%	11%	11%	7%	13%	11%
June	14%	14%	15%	13%	15%	15%
July	19%	24%	17%	26%	15%	13%
August	21%	19%	20%	24%	16%	9%
September	11%	11%	14%	10%	12%	7%
October	3%	3%	3%	2%	5%	4%
November	1%	1%	1%	0%	3%	3%
December	1%	1%	0%	1%	1%	2%
I don't know yet	4%	3%	4%	3%	4%	5%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Base: People with a holiday intention for 2024 (booked or yet to book)
Highlight: highest percentage by country

Q: In which month do you expect to spend your longest holiday of the year (in 2024)?
If the holiday falls in more than one month, select the month of departure.

🇳🇴 Norway

Departure month of longest 2024 holiday

Innovation Norway

Bærekraft

About half (49%) of those surveyed agree with the statement 'I think it is important to take the environment into account when booking my holiday'. This average is exactly the same as a year ago. Of the six countries below, the Dutch agree least with this statement and the French agree most.

I think it is important to consider the environment when booking my holiday
(e.g. choice of means of transport, destination, accommodation)

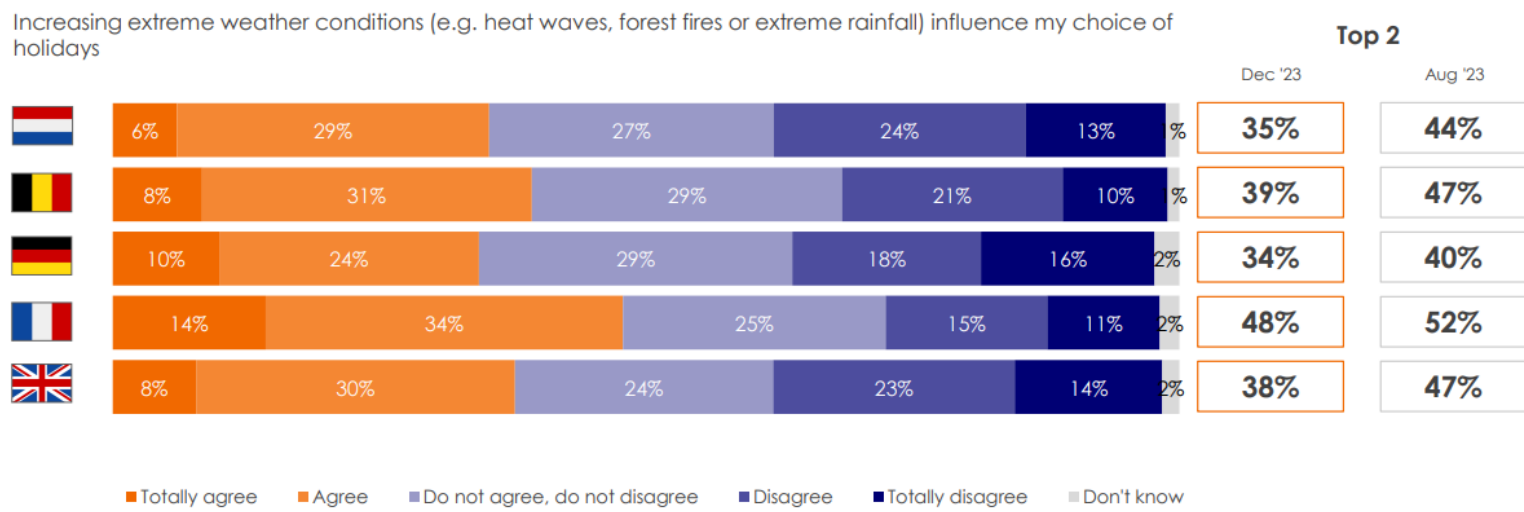|	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Top 2 Dec '23	Top 2 Dec '22
🇳🇱	9%	28%	34%	16%	11%	2%	37%	40%
🇧🇪	9%	34%	35%	14%	6%	2%	43%	46%
🇩🇪	14%	32%	32%	11%	10%	2%	46%	47%
🇫🇷	18%	39%	23%	9%	7%	2%	58%	62%
🇬🇧	14%	42%	27%	10%	7%	%	56%	53%
🇺🇸	18%	35%	23%	11%	11%	%	53%	49%

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
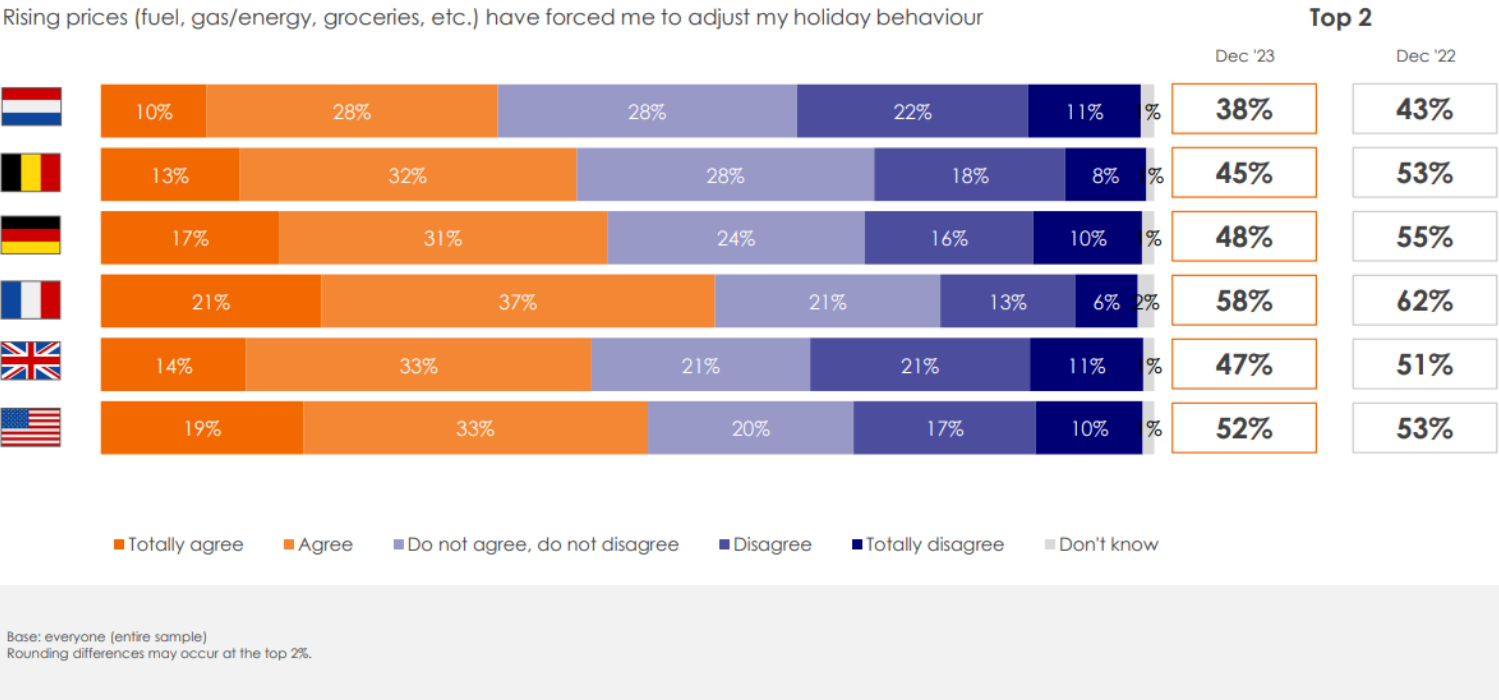Rounding differences may occur at the top 2%.

Ekstremvær

On average, 39% of those surveyed agree with the statement that increasing extreme weather conditions influence holiday choices. At the end of August, this average was 46%. French people are in highest agreement with this statement.

Increasing extreme weather conditions (e.g. heat waves, forest fires or extreme rainfall) influence my choice of holidays

	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Top 2 Dec '23	Top 2 Aug '23
🇳🇱	6%	29%	27%	24%	13%	%	**35%**	**44%**
🇧🇪	8%	31%	29%	21%	10%	%	**39%**	**47%**
🇩🇪	10%	24%	29%	18%	16%	2%	**34%**	**40%**
🇫🇷	14%	34%	25%	15%	11%	2%	**48%**	**52%**
🇬🇧	8%	30%	24%	23%	14%	2%	**38%**	**47%**

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ■ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

🇳🇴 Norway

Extreme weather

Innovation Norway

Økte priser - påvirkning av ferie 1

Just under half (48% on average) say they are forced to adjust holiday behaviour as a result of rising prices. A year ago, this was 53% on average. The French are still in highest agreement with this statement (58%) and the Dutch the least (38%).

Rising prices (fuel, gas/energy, groceries, etc.) have forced me to adjust my holiday behaviour

	Top 2	
	Dec '23	Dec '22

Flag	Totally agree	Agree	Do not agree, do not disagree	Disagree	Totally disagree	Don't know	Dec '23	Dec '22
🇳🇱	10%	28%	28%	22%	11%	%	38%	43%
🇧🇪	13%	32%	28%	18%	8%	1%	45%	53%
🇩🇪	17%	31%	24%	16%	10%	%	48%	55%
🇫🇷	21%	37%	21%	13%	6%	2%	58%	62%
🇬🇧	14%	33%	21%	21%	11%	%	47%	51%
🇺🇸	19%	33%	20%	17%	10%	%	52%	53%

■ Totally agree ■ Agree ■ Do not agree, do not disagree ■ Disagree ■ Totally disagree ▫ Don't know

Base: everyone (entire sample)
Rounding differences may occur at the top 2%.

Norway

Rising prices

35

Nederland/Belgia

Økte priser - påvirkning av ferie 2

In December 2023, people indicate that if they change their holiday behaviour (due to higher prices), they do so mainly by going on holiday less often (44% on average) and/or choosing cheaper accommodation (42% on average). The least chosen options are avoiding the high season (mean 25%) and saving on transport (mean 20%).

	🇳🇱	🇧🇪	🇩🇪	🇫🇷	🇬🇧	🇺🇸
Shorter holidays	26%	28%	26%	30%	**31%**	**38%**
Less frequent holidays	**41%**	**42%**	**45%**	**44%**	**46%**	**44%**
Cheaper accommodation	**38%**	**41%**	**47%**	**36%**	**48%**	**41%**
Cheaper transport	18%	16%	19%	17%	22%	26%
Save at destination itself	**34%**	28%	**31%**	**34%**	27%	34%
Avoiding the high season	27%	**29%**	26%	22%	25%	23%
Other, namely	4%	3%	2%	1%	2%	5%

Base: People who (totally) agree with the statement 'Rising prices (fuel, gas/energy, groceries, etc.) are forcing me to adjust my holiday behaviour'
Highlighting: the three highest scores from each country are in bold
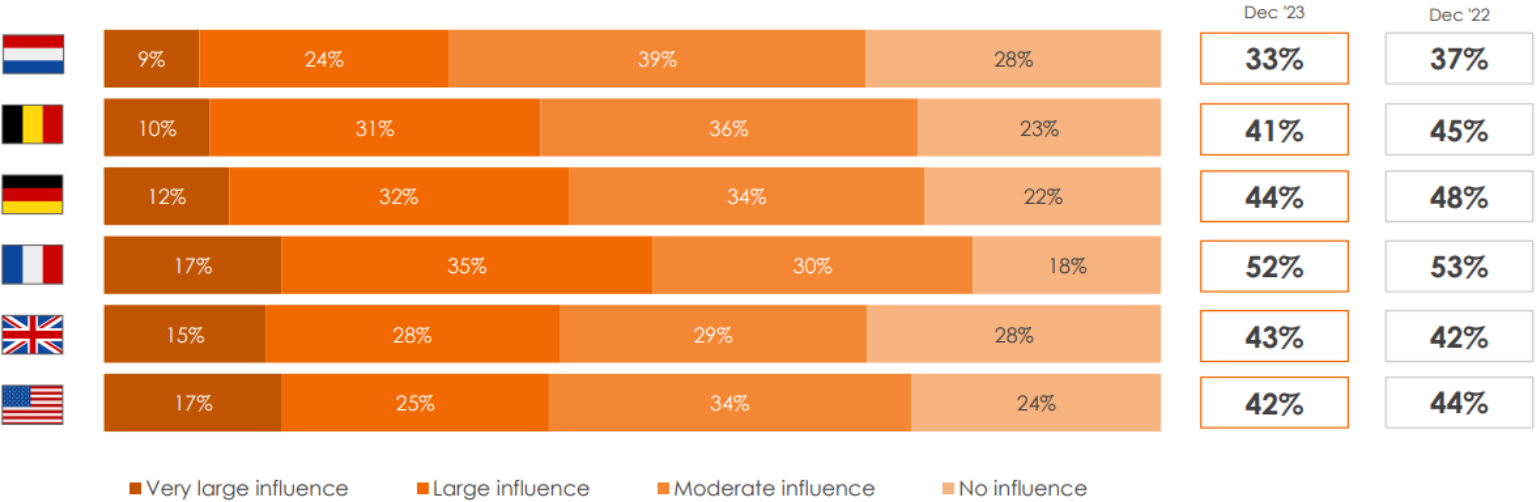
Questionnaire: In what ways do you mainly adjust your holiday behaviour as a result of rising prices? Multiple answers possible (max. 3).

Kilde: Nederlands Bureau voor Toerisme & Congressen (NBTC)

Norway

Holiday behaviour adjustment

36

Økte priser - påvirkning av ferie 3

Of those who have holiday intentions but have not yet booked, 42% on average say that rising prices have a (very) big influence on this. A year ago, this was 45% on average. The top2 scores currently range from 33% among the Dutch to 52% among the French.

To what extent do rising prices (fuel, gas/energy, groceries, etc.) have to do with the fact that you have not yet booked a holiday for 2024?

Flag	Very large influence	Large influence	Moderate influence	No influence	Dec '23	Dec '22
🇳🇱	9%	24%	39%	28%	33%	37%
🇧🇪	10%	31%	36%	23%	41%	45%
🇩🇪	12%	32%	34%	22%	44%	48%
🇫🇷	17%	35%	30%	18%	52%	53%
🇬🇧	15%	28%	29%	28%	43%	42%
🇺🇸	17%	25%	34%	24%	42%	44%

■ Very large influence ■ Large influence ■ Moderate influence ■ No influence

Base: People who have not yet booked but have a holiday intention for 2024.
Rounding differences may occur at the top 2%.

Q: To what extent do rising prices (fuel, gas/energy, groceries, etc.) have to do with the fact that you have not yet booked a holiday for 2024?

Kilde: Nederlands Bureau voor Toerisme & Congressen (NBTC)
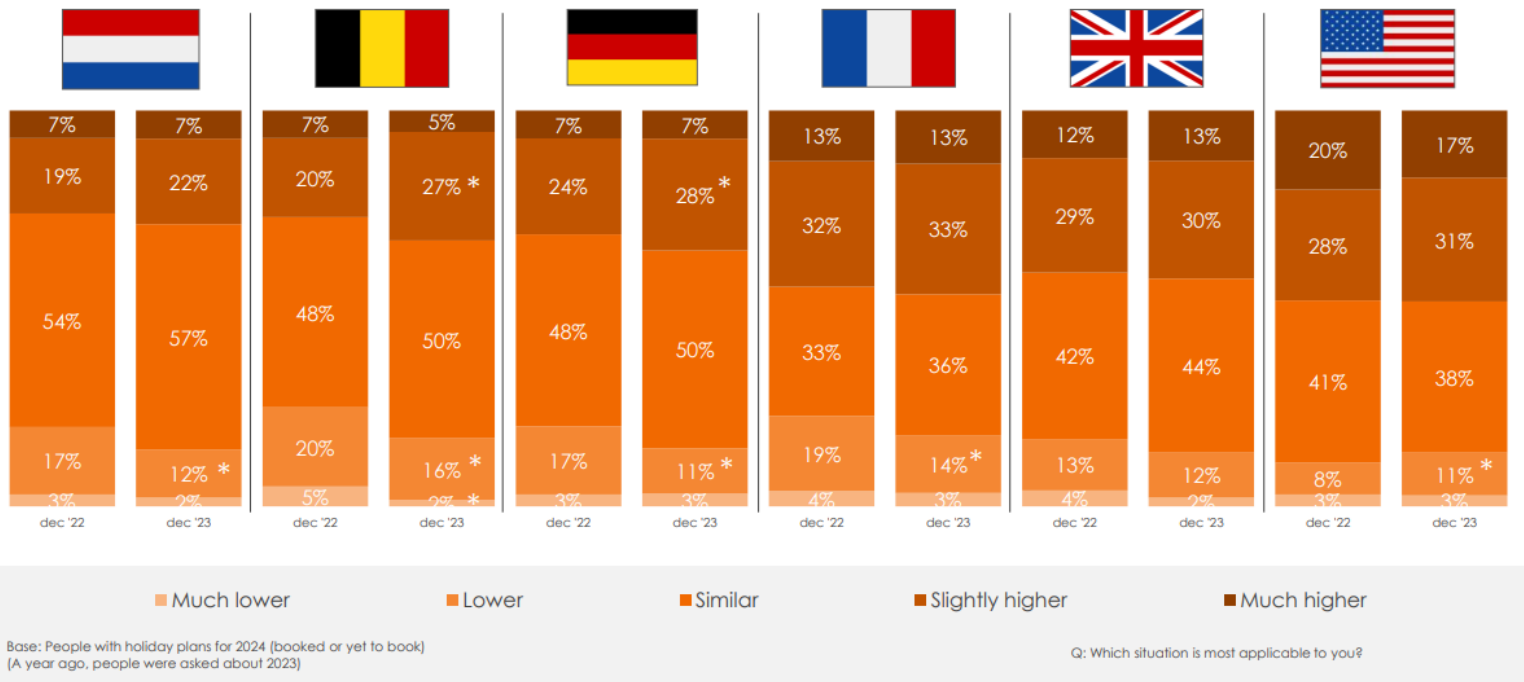
Nederland/Belgia

Feriebudsjett

Of those with a holiday intention for 2024, an average of 46% say they have a similar holiday budget for their next holiday as in previous years. A year ago, this was 44% on average. Furthermore, an average of 29% say they will have a slightly higher budget (a year ago this was 25%).
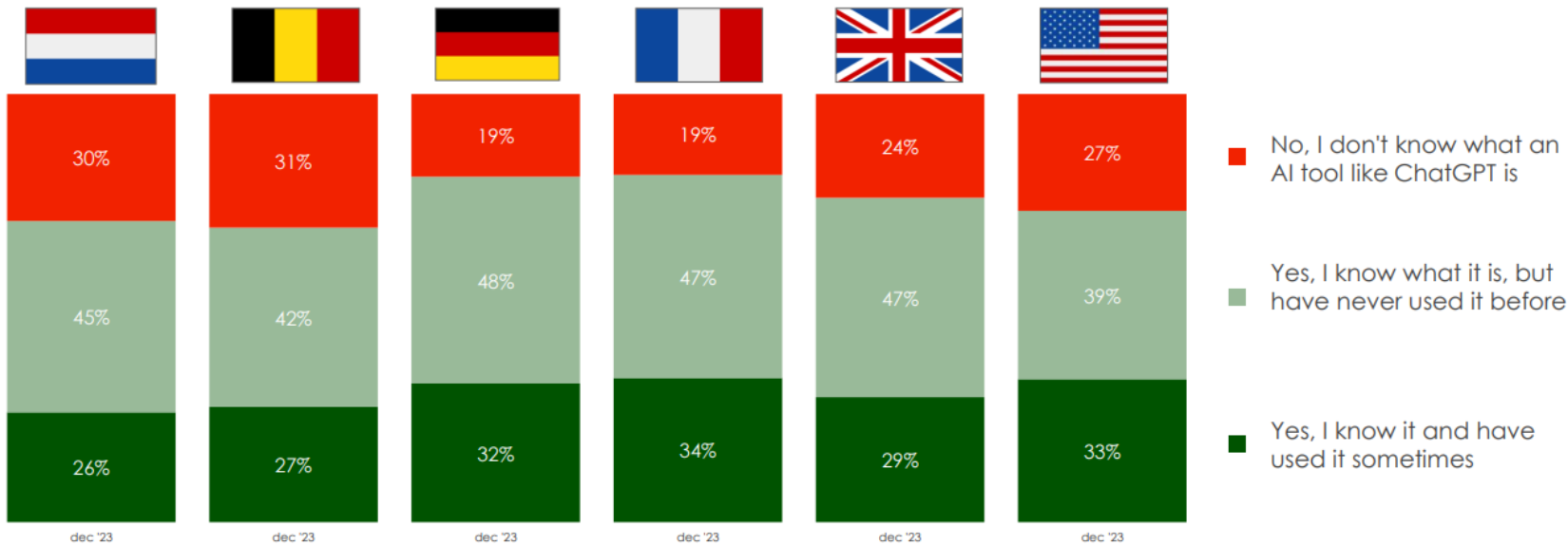
The holiday budget for my next holiday in 2024 is....

	Netherlands dec '22	Netherlands dec '23	Belgium dec '22	Belgium dec '23	Germany dec '22	Germany dec '23	France dec '22	France dec '23	UK dec '22	UK dec '23	USA dec '22	USA dec '23
Much higher	7%	7%	7%	5%	7%	7%	13%	13%	12%	13%	20%	17%
Slightly higher	19%	22%	20%	27% *	24%	28% *	32%	33%	29%	30%	28%	31%
Similar	54%	57%	48%	50%	48%	50%	33%	36%	42%	44%	41%	38%
Lower	17%	12% *	20%	16% *	17%	11% *	19%	14% *	13%	12%	8%	11% *
Much lower	3%	2%	5%	2% *	3%	3%	4%	3%	4%	2%	3%	3%

■ Much lower   ■ Lower   ■ Similar   ■ Slightly higher   ■ Much higher

Base: People with holiday plans for 2024 (booked or yet to book)
(A year ago, people were asked about 2023)

Q: Which situation is most applicable to you?

Nederland/Belgia
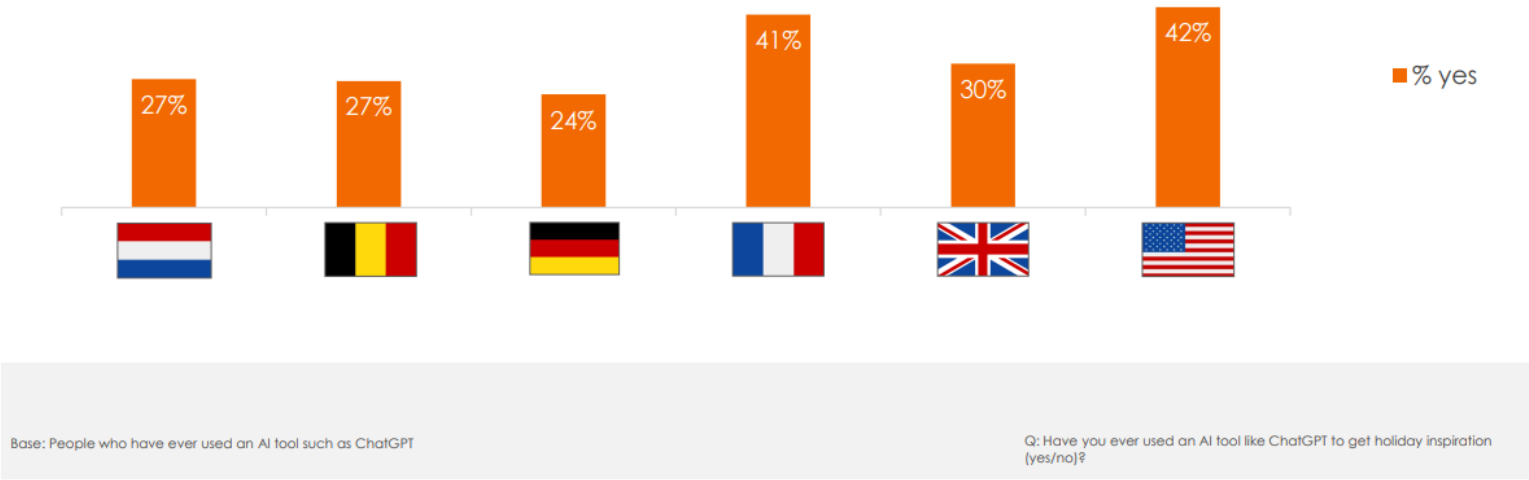
AI – bruk og kjennskap

On average, 30% of those surveyed are familiar with AI tools like ChatGPT and have used it. On average 45% know what it is but have never used it. On average 25% do not know what an AI tool like ChatGPT is.

AI for ferieinspirasjon

Of those who do use an AI tool such as ChatGPT, an average of 32% use such a tool for holiday inspiration. This percentage is highest among Americans and French (42% and 41% respectively) and lowest among Germans (24%).

■ % yes

Base: People who have ever used an AI tool such as ChatGPT

Q: Have you ever used an AI tool like ChatGPT to get holiday inspiration (yes/no)?

■ Norway

AI tool usage for holiday inspiration

43

Har du spørsmål eller kommentarer til markedsinnsikten, kontakt meg gjerne.

Ønsker du å lese hele rapporten fra Nederlands Bureau voor Toerisme & Congressen (NBTC)?

Kontakt:

ingunn.sakshaug@innovasjonnorge.no

Norway

Innovation Norway