

Market Update

14 June, 2025

In preparation for IPW 2025, Visit USA The Netherlands conducted a survey among its Dutch members to gain insight into the current image of the USA in the Netherlands and its impact on booking figures for both 2025 and 2026.

Background: Both the figures provided by U.S. Travel regarding entries into the USA and the forward booking data from the Dutch tourism organisation ANVR indicate a decline in current and future arrivals to the USA. ANVR statistics show a 40% decrease in bookings made in March 2025 compared to March 2024.

The survey confirms a shared perception that the image of the USA as a holiday destination has deteriorated over the past few months. Summer 2025 bookings are down for most companies, with nearly half reporting a decrease of 10% or more in bookings through 31 August 2025. This decline is attributed to high travel costs, political developments, and growing uncertainty and concern about traveling to the USA. The current favorable USD-EUR exchange rate appears to have a very limited impact in stimulating new bookings.

Looking ahead, to travel from September 2025 onwards, the outlook is more balanced: 65% of respondents expect either a slight decrease or slight increase in bookings. However, the reliability of entry procedures and the cost of airfares are cited as decisive factors influencing travel intent.

Although most companies are currently adjusting their marketing strategies — shifting focus to other destinations or pausing marketing efforts altogether — the vast majority expects no reduction, or even an increase, in their marketing budgets for the USA.

Companies are calling on local partners to help promote the USA as a safe and attractive holiday destination and to continue investing in the Dutch market. When asking our members what they need from local partners, the following key points could be concluded:

- Accurate, up-to-date information on local conditions, National Park situations and entry requirements
- More competitive rates
- Continued promotion and investment in the Dutch market

This requires a joint effort — your support is needed now more than ever. All respondents indicate that they are currently experiencing only positive outcomes when it comes to travel to the USA. This shared sentiment can serve as a solid foundation for joint, positive promotion efforts — highlighting the unchanged appeal of the USA's iconic and diverse landscapes.

The Board of Visit USA The Netherlands

Note: Responses were received from 23 members (19 touroperators, 2 car-/motorhome rental companies and 2 airlines)

Survey results per question

Image of the USA as holiday destination in the Netherlands

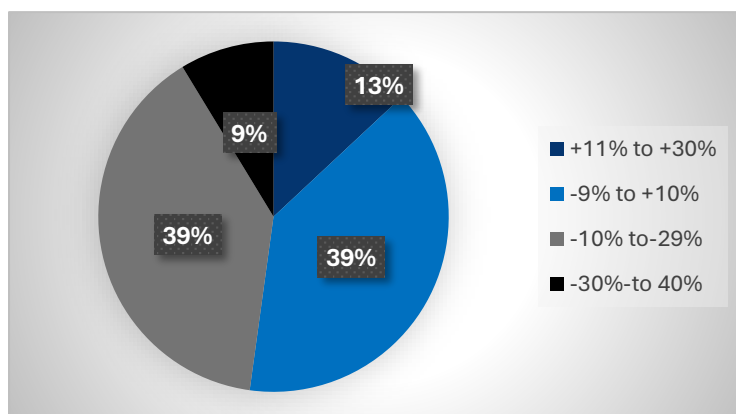
All respondents agree that the image of the USA as a holiday destination has deteriorated in recent months, and that the country has become less popular among Dutch travelers.

Entry procedures

Seventy percent of respondents have travelled to the USA in recent months. None reported any issues upon entry. In fact, some described the entry process as more positive than in the past and noted that their clients shared the same impression. These positive experiences present an opportunity to highlight in future marketing campaigns.

Bookings for travel in Summer 2025

Eighty-seven percent of respondents report that bookings through August 2025 are either at the same level or lower compared to the previous year. Notably, 48% indicate a year-to-date decrease of more than 10%. In addition, four respondents have observed an increase in cancellations compared to last year.



Key factors for drop in bookings

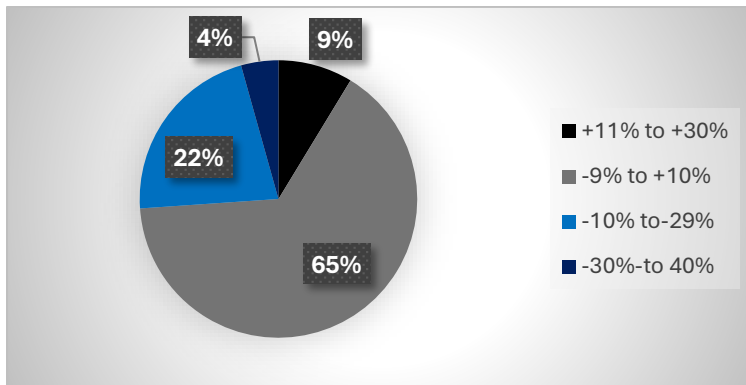
The two main factors cited for the drop in bookings are high travel costs and the current political climate. Uncertainty and fear surrounding travel to the USA are also frequently mentioned. Additionally, concerns about the potential closure of National Parks contribute to the hesitancy among travelers.

Effect of the lower exchange rate

When asked whether booking patterns have changed in recent weeks – for example, due to the more favorable USD-EUR exchange rate – only five respondents reported a (modest) increase in bookings for either 2025 or 2026.

Outlook for Travel from September 2025 Onwards

When asked about the booking outlook for travel from September 2025 onwards, responses were more balanced: 65% expect a slight decrease or slight increase in bookings. However, 13% of respondents still anticipate a decline of more than 10%.

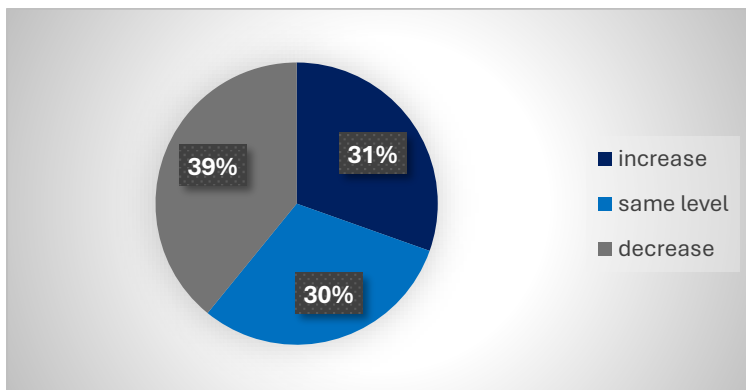


Key Factors Influencing Travel Decisions

The most important factors influencing clients' decisions to travel to the USA are the stability of entry procedures and the cost of airfares. While the euro-dollar exchange rate, as well as prices for accommodation and car rental, are also mentioned, they are considered slightly less critical.

Development of company marketing budget and strategy for the USA

When asked about changes to their marketing budget for the USA, 61% of companies indicated they will maintain or even increase their investment in promoting the destination.



However currently, 80% of companies are either not promoting the USA at all or are doing so to a much lesser extent than before. These companies are focusing on other destinations or targeting only their existing client database. While some question whether it is appropriate to actively promote the USA right now – given the concerns expressed by clients – others believe this may be the right moment to restart active promotion of the USA as a holiday destination.