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Discover New England – Market Update

Netherlands, Belgium, Luxembourg

1. Would you consider the geo-political-economic condition of your market to be stable (eg. inflation, gdp, health of mid-upper class, relations with USA, consumer confidence)?

Please briefly explain:

Overall, the Benelux market can be considered stable, with strong purchasing power and solid travel potential. Inflation has moderated compared to previous years, and the mid- to upper-income segment remains resilient and continues to travel. GDP per capita is approximately €53,000, well above the EU average, and the workforce benefits from at least 25 vacation days and 11 public holidays, supporting a high propensity to travel. In addition, employees receive an average of 8% of their annual salary as a holiday allowance.

Consumer confidence remains somewhat cautious due to ongoing geopolitical uncertainty and rising travel costs. Sentiment toward the USA has declined, which is impacting booking behaviour. Despite this, the overall desire to travel remains strong.

2. What is trending for long-haul travel interests (eg. sports/events, readaways/hospitality, adventure, nostalgia, luxury, budget, astrotourism/nature-based, solo, etc)

1. Top interest: experience-led travel
2. Interest: off-the-beaten path
3. Interest: combination nature and city escape

Comment:

Over the last couple of years, the Benelux traveler has been looking for more experience-driven and purposeful travel. While relaxation and escaping daily routines remain key motivations, there is a growing interest in cultural discovery, outdoor activities, and meaningful experiences. Travelers are also becoming more conscious of their ecological footprint, often opting for local accommodations and nature-based experiences.

At the same time, value for money plays a central role in decision-making. Travelers are willing to spend, but expect a clear return in terms of quality, comfort, and overall experience. This leads to more considered booking behaviour, where price is carefully weighed against perceived value.

Travel patterns reflect a strong preference for combining urban and natural environments within one trip. Many travelers start in a city and continue their journey with a road trip by rental car or RV, allowing for flexibility and variety. As a result, fly-drive has become the dominant travel style in the Benelux market. New England is well positioned, supported by direct accessibility from Amsterdam to Boston and relatively short transatlantic flight times.

3. Major industry news/announcements since last Summit (eg major travel company changes and/or flights to Boston/New York gateways):

Comment:

JetBlue expands its transatlantic network with yearround flights from Amsterdam to Boston. Rising fuel costs have led to increased airfares across European carriers, including long-haul routes to North America. Airlines such as KLM and Transavia have implemented fare increases and surcharges.

4. Rank top three concerns affecting future travel to New England (eg. Sentiment towards USA, sentiment towards New England, fuel prices impacting cost of travel, competition, affordability of destination, airline availability, availability of product, esta/visa process, source market political environment, source market economics/politics stability, trends, etc.):

1. Top Concern: Sentiment toward the USA
2. Concern: Rising airfares and overall travel costs
3. Concern: Competition from European destinations

Perception of the USA has become more sensitive in the Benelux market, influencing travel intent. At the same time, increased costs, particularly airfare, are impacting affordability. Strong competition from closer European destinations, which are perceived as more accessible and cost-efficient, is also influencing destination choice. Last year the main questions of travelers were concerning in the National Park passes, this year we see that is has shifted to "Are we able / is it still recommended to travel to the USA?".

5. What advice to you have for New England's tourism suppliers to succeed in your market over the next two years (hotels, attractions, dmos, transportation, etc)?

Advice:

Focus on clearly communicating value for money, as Benelux travelers are willing to spend but expect a high-quality and well-rounded experience in return. Transparency in pricing and inclusions is key.

Highlight sustainable practices and authentic, locally driven experiences, as sustainability is becoming an increasingly important factor in destination choice. This includes showcasing nature-based activities, local partnerships, and responsible tourism initiatives.

Position New England as a destination that offers a combination of city and nature. Itineraries that integrate urban experiences with road trips, outdoor activities, and scenic landscapes strongly align with current travel preferences in the Benelux market.

Additionally, offer flexible and easy-to-book products, as travelers are increasingly planning more carefully and comparing options. Clear storytelling around unique experiences, regional diversity, and accessibility will help differentiate New England from competing destinations.