Leisure visitors experience survey

KANTAR TNS
Description of the survey
Methodology
Over 1,600 surveys conducted in Brussels between Apr. 2017 and Apr. 2018

1. Who?
   - Overnight visitors
     1,244 interviews conducted in Brussels
   - One-day visitors
     437 interviews conducted in Brussels

2. When?
   12 months
   Between April 2017 and April 2018

3. Where?
   - Grand Place
   - Monnaie
   - Gare du Midi
   - Parlementarium
   - Parc du Cinquantenaire
   - Atomium
   - Avenue Louise
Brussels’ visitors profile
Profile of respondents

<table>
<thead>
<tr>
<th>Category</th>
<th>Left Group</th>
<th>Right Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>42,27</td>
<td>41,22</td>
</tr>
<tr>
<td>Group size</td>
<td>2,61</td>
<td>3,37</td>
</tr>
<tr>
<td>Kids in group</td>
<td>6,3%</td>
<td>10,9%</td>
</tr>
<tr>
<td>Duration (nights)</td>
<td>2,03</td>
<td>7,08</td>
</tr>
</tbody>
</table>
Age of overnight visitors (%)
Profile of overnight visitors – deep dive

One-day visitors are more likely to visit Brussels with children

<table>
<thead>
<tr>
<th>Staying</th>
<th>One Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>6%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Chinese and Japanese visitors are the youngest overnight visitors (32 & 34 years old), while Belgians and Swiss are the oldest (51 and 47 years old).

Duration of stay (#nights)

<table>
<thead>
<tr>
<th>Country</th>
<th>Belgium</th>
<th>Netherlands</th>
<th>Germany</th>
<th>United Kingdom</th>
<th>France</th>
<th>Italy</th>
<th>Spain</th>
<th>Switzerland</th>
<th>United States</th>
<th>Russia</th>
<th>Japan</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration</td>
<td>1.42</td>
<td>1.57</td>
<td>1.87</td>
<td>2.36</td>
<td>2.07</td>
<td>2.31</td>
<td>2.95</td>
<td>1.82</td>
<td>2.66</td>
<td>2.43</td>
<td>1.81</td>
<td>1.93</td>
</tr>
</tbody>
</table>

Visitors with kids under 12

<table>
<thead>
<tr>
<th>Country</th>
<th>Spain</th>
<th>Switzerland</th>
<th>China</th>
<th>Germany</th>
<th>Italy</th>
<th>Netherlands</th>
<th>Japan</th>
<th>United States</th>
<th>United Kingdom</th>
<th>Russia</th>
<th>France</th>
<th>Belgium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kids under 12%</td>
<td>11.4%</td>
<td>10.1%</td>
<td>9.8%</td>
<td>9.6%</td>
<td>8.2%</td>
<td>7.8%</td>
<td>7.8%</td>
<td>6.3%</td>
<td>5.9%</td>
<td>4.7%</td>
<td>3.7%</td>
<td>2.9%</td>
</tr>
</tbody>
</table>
Profile of overnight visitors – deep dive

35% of the respondents have already visited Brussels.

Tourists who visit Brussels are mostly educated people.

Words used to describe Brussels

Repeat visitors by nationality
Travel preparation
Motivation for Brussels

**Overnight visitors**

- Patrimony: 35%
- Reputation: 24%
- Local products: 20%
- History: 18%
- Eat and drinks: 18%
- Atmosphere: 18%
- Entertainment: 18%
- Friends, Family: 15%
- Shopping: 15%
- Gastronomy: 12%
- Art: 11%
- Non-artistic museums: 11%
- Cultural Event: 10%
- Other Event: 6%

**One-day visitors**

- Entertainment: 25%
- Atmosphere: 22%
- Patrimony: 19%
- Friends, Family: 19%
- Shopping: 19%
- Eat and drinks: 17%
- Non-artistic museums: 14%
- Reputation: 12%
- History: 12%
- Local products: 11%
- Cultural Event: 11%
- Art: 7%
- Other Event: 7%
- Gastronomy: 7%
Lead time of booking

Overnight visitors

**Package**

- > 3 months: 16%
- 1 month --> 3 months: 49%
- 2 weeks --> 1 month: 22%
- 1 week --> 2 weeks: 7%
- < 1 week: 5%

**Accommodation**

- > 3 months: 7%
- 1 month --> 3 months: 33%
- 2 weeks --> 1 month: 33%
- 1 week --> 2 weeks: 17%
- < 1 week: 10%

**Travel**

- > 3 months: 4%
- 1 month --> 3 months: 33%
- 2 weeks --> 1 month: 30%
- 1 week --> 2 weeks: 16%
- < 1 week: 16%

One-day visitors

**Travel**

- > 3 months: 1%
- 1 month --> 3 months: 17%
- 2 weeks --> 1 month: 17%
- 1 week --> 2 weeks: 15%
- < 1 week: 18%
Date of booking – deep dive

The farther people come from, the sooner they book their stay

People staying at **hotels** book their stay sooner

People who stay longer in Brussels will book their stay more in advance

People will book sooner if it is their **first trip** to Brussels
Accommodation booking

**Type of lodging**

- Hotel: 62%
- B&B: 19%
- Private room: 8%
- Apart-hotel: 8%
- Young hostel: 3%

**Online booking**

- Online: 90%
- Offline: 10%

**Source of booking**

- Direct to lodging: 32%
- Through intermediary: 67%

**Top intermediaries (90% of total)**

- Booking.com: 70%
- Airbnb: 20%
- Hotels.com, Expedia, Lilligo, Kayak, eDreams, Govoyages, Opodo: 10%
Accommodation booking—deep dive

Only 20% of Spanish tourists book their lodging directly to the lodging, while 55% of Swiss and 45% of Belgian do so.

Visitors from the Netherlands (61%) and Switzerland (58%) book the less through internet, US visitors (94%) the most.

The preferred channel depends on the nationality.

Booking and Expedia are more popular for older visitors, AirBnB for young ones.
Source of information – before

**Overnight visitors**

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Websites</td>
<td>62%</td>
</tr>
<tr>
<td>Social Media</td>
<td>11%</td>
</tr>
<tr>
<td>TV</td>
<td>7%</td>
</tr>
<tr>
<td>Magazines</td>
<td>9%</td>
</tr>
<tr>
<td>Folders</td>
<td>13%</td>
</tr>
<tr>
<td>Travel Guides</td>
<td>20%</td>
</tr>
<tr>
<td>Friends, Family</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Not done</td>
<td>17%</td>
</tr>
</tbody>
</table>

**One-day visitors**

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Websites</td>
<td>37%</td>
</tr>
<tr>
<td>Social Media</td>
<td>7%</td>
</tr>
<tr>
<td>TV</td>
<td>6%</td>
</tr>
<tr>
<td>Magazines</td>
<td>10%</td>
</tr>
<tr>
<td>Folders</td>
<td>10%</td>
</tr>
<tr>
<td>Travel Guides</td>
<td>8%</td>
</tr>
<tr>
<td>Friends, Family</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>Not done</td>
<td>46%</td>
</tr>
</tbody>
</table>
People **under 35** use almost 2x more **social media** to prepare their trip than people over 50

25% of people above 50 do not look for any information before coming to Brussels (vs. 17% global)

**Chinese** and **Japanese** use 2x more **social media** to prepare their trip than European visitors

US visitors are the biggest users of travel guides (36% of them vs. 20% global)
Source of information: websites

**Overnight visitors (top 5)**

- Bookingsite: 42%
- Accommodation Website: 30%
- Blogs: 23%
- Reviews Websites: 20%
- visit.brussels: 17%

**One-day visitors (top 5)**

- visit.brussels: 27%
- Blogs: 25%
- Accommodation Website: 20%
- Reviews Websites: 15%
- Others: 15%
## Transport to destination

<table>
<thead>
<tr>
<th>Mode</th>
<th>Own car</th>
<th>Rental car</th>
<th>Regular train</th>
<th>High-speed train</th>
<th>Bus</th>
<th>Plane</th>
<th>Boat</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of respondents</td>
<td>34%</td>
<td>4%</td>
<td>18%</td>
<td>22%</td>
<td>9%</td>
<td>30%</td>
<td>0,4%</td>
<td>0,3%</td>
</tr>
<tr>
<td>% of respondents</td>
<td>45%</td>
<td>2%</td>
<td>32%</td>
<td>12%</td>
<td>13%</td>
<td>0%</td>
<td>0,9%</td>
<td>2,2%</td>
</tr>
</tbody>
</table>

### Airport of arrival
- Zaventem – 70%
- Charleroi – 14%
- Amsterdam – 8%
- Frankfurt – 3%
- Paris – 2%
- UK – 1%
## Transport to destination

<table>
<thead>
<tr>
<th></th>
<th>BE</th>
<th>NL</th>
<th>DE</th>
<th>UK</th>
<th>FR</th>
<th>IT</th>
<th>ES</th>
<th>CH</th>
<th>US</th>
<th>RU</th>
<th>JP</th>
<th>CN</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Own car</strong></td>
<td>57,8</td>
<td>68,6</td>
<td>48,2</td>
<td>8,8</td>
<td>49,5</td>
<td>9,1</td>
<td>9,5</td>
<td>32,9</td>
<td>0,9</td>
<td>4,7</td>
<td>3,9</td>
<td>2</td>
</tr>
<tr>
<td><strong>Rental car</strong></td>
<td>3,9</td>
<td>0</td>
<td>1,8</td>
<td>2</td>
<td>1,8</td>
<td>4,5</td>
<td>5,7</td>
<td>7,6</td>
<td>7,2</td>
<td>6,6</td>
<td>8,8</td>
<td>9,8</td>
</tr>
<tr>
<td><strong>Regular train</strong></td>
<td>36,3</td>
<td>11,8</td>
<td>12,3</td>
<td>11,8</td>
<td>13,8</td>
<td>7,3</td>
<td>11,4</td>
<td>7,6</td>
<td>12,6</td>
<td>3,8</td>
<td>12,7</td>
<td>14,7</td>
</tr>
<tr>
<td><strong>High-speed train</strong></td>
<td>2,9</td>
<td>23,5</td>
<td>23,7</td>
<td>47,1</td>
<td>24,8</td>
<td>21,8</td>
<td>15,2</td>
<td>45,6</td>
<td>26,1</td>
<td>21,7</td>
<td>32,4</td>
<td>27,5</td>
</tr>
<tr>
<td><strong>Bus</strong></td>
<td>2</td>
<td>2,9</td>
<td>7</td>
<td>13,7</td>
<td>6,4</td>
<td>17,3</td>
<td>14,3</td>
<td>7,6</td>
<td>13,5</td>
<td>24,5</td>
<td>22,5</td>
<td>15,7</td>
</tr>
<tr>
<td><strong>Plane</strong></td>
<td>1</td>
<td>1</td>
<td>13,2</td>
<td>24,5</td>
<td>10,1</td>
<td>48,2</td>
<td>59</td>
<td>15,2</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>
Visit of Brussels
Source of information – on site

**Overnight visitors**

- Tourism Office: 33%
- Social Media: 28%
- Travel Guide: 27%
- visit.brussels Website: 14%
- Other Websites: 33%
- Apps: 19%
- Local People: 10%
- Hotels or Restaurant: 14%
- Others: 2%

**One-day visitors**

- Tourism Office: 29%
- Social Media: 32%
- Travel Guide: 19%
- visit.brussels Website: 8%
- Other Websites: 23%
- Apps: 26%
- Local People: 18%
- Hotels or Restaurant: 6%
- Others: 9%
“50-64 people are twice more likely (47%) than 18-24 (24%) to go to tourism offices.”

“People staying in other types of lodgings go to tourism offices twice more often (55%) than hotel guests (26%).”

“Chinese and Japanese use 2x more social media than European guests to look for information during their stay.”

“People staying > 1 nights are 4 times more likely to go on the visit.brussels website during their stay.”
Daily expenses of visitors

**Overnight visitors** 140€

- Meal: €43.77
- Attractions: €13.92
- Transportation: €9.68
- Shopping: €19.82
- Lodging: €52.31

**One-day visitors** 92€

- Meal: €28.01
- Attractions: €20.37
- Transportation: €8.70
- Shopping: €35.31
Expenses of overnight visitors

<table>
<thead>
<tr>
<th>Country</th>
<th>Lodging</th>
<th>Food &amp; drinks</th>
<th>Attractions</th>
<th>Transportation</th>
<th>Shopping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>56 €</td>
<td>49 €</td>
<td>18 €</td>
<td>6 €</td>
<td>4 €</td>
</tr>
<tr>
<td>Netherland</td>
<td>49 €</td>
<td>40 €</td>
<td>13 €</td>
<td>6 €</td>
<td>6 €</td>
</tr>
<tr>
<td>Germany</td>
<td>52 €</td>
<td>47 €</td>
<td>13 €</td>
<td>10 €</td>
<td>7 €</td>
</tr>
<tr>
<td>UK</td>
<td>52 €</td>
<td>48 €</td>
<td>11 €</td>
<td>14 €</td>
<td>14 €</td>
</tr>
<tr>
<td>France</td>
<td>49 €</td>
<td>44 €</td>
<td>17 €</td>
<td>10 €</td>
<td>10 €</td>
</tr>
<tr>
<td>Italy</td>
<td>47 €</td>
<td>33 €</td>
<td>17 €</td>
<td>13 €</td>
<td>13 €</td>
</tr>
<tr>
<td>Spain</td>
<td>51 €</td>
<td>37 €</td>
<td>13 €</td>
<td>12 €</td>
<td>13 €</td>
</tr>
<tr>
<td>Switzerland</td>
<td>59 €</td>
<td>53 €</td>
<td>9 €</td>
<td>10 €</td>
<td>9 €</td>
</tr>
<tr>
<td>US</td>
<td>56 €</td>
<td>50 €</td>
<td>19 €</td>
<td>24 €</td>
<td>19 €</td>
</tr>
<tr>
<td>Russia</td>
<td>50 €</td>
<td>41 €</td>
<td>16 €</td>
<td>11 €</td>
<td>12 €</td>
</tr>
<tr>
<td>Japan</td>
<td>55 €</td>
<td>44 €</td>
<td>11 €</td>
<td>11 €</td>
<td>12 €</td>
</tr>
<tr>
<td>China</td>
<td>54 €</td>
<td>47 €</td>
<td>12 €</td>
<td>20 €</td>
<td>17 €</td>
</tr>
</tbody>
</table>
Expenses – deep dive

People booking their lodging on AirBnB spend 25% less per day than the global average

- Direct to lodging: 155 €
- booking.com: 131 €
- expedia: 143 €
- airbnb: 104 €
- other OTA: 149 €

People who stay longer spend less on a daily basis (but more in total)

- 1 night: 149 €
- 2 nights: 137 €
- More: 126 €

Amount of spending increases with age

- 18-24: 109 €
- 18-34: 119 €
- 35-49: 145 €
- 50-64: 147 €
- 65+: 219 €

Food lovers spend 11% more daily than other visitors

- Yes: 148 €
- No: 133 €
Satisfaction – other statements

88% of the tourists feel safe in Brussels

85% of the tourists consider Brussels suitable for trips with children

60% of the tourists never felt there were too many visitors in Brussels