Mapping Brussels MICE reputation and business-to-leisure conversion opportunities
Content

03 Survey Introduction
   Objectives
   methodology

11 Brussels competitive image
   Familiarity
   Attractiveness
   Competitive Brand Image

25 TRAVELSAT Index focus
   Overall competitive assessment

42 Market Dashboard
   Key result per market

06 Business travellers’ expectations
   Sample description
   Favorite activities
   Best memorable “off-business” experiences

17 Business to leisure conversion
   Activities done and best memorable experience
   Conversion / repeat visit consideration
   Obstacles and Drivers / Opportunities

38 Take-Aways
   Overall conclusions
Survey introduction
Objectives and Methodology
Brussels attracts a large part of business visitors and benefits from a high level of awareness among both meeting planners and individual business travelers coming in the “European Capital”. Converting this regular large flow of business visitors into active leisure repeaters and destination ambassadors represents a huge opportunity for the city to amplify economic impact and brand appeal competitiveness internationally.

In order to inform its strategy, VisitBrussels wishes to map through a research:

- **The current competitive reputation of the city** as Business & MICE place,
- **The city experience among MICE visitors** incl. business and “bleisure” facets, satisfaction and post visit intentions,
- **Drivers and obstacles** for converting MICE visitors into leisure tourists and ambassadors.

In that purpose, TCI Research has carried out a “two-in-one” ad hoc survey measuring:

- **Brussels’ competitive brand reputation** among a broad panel of potential international MICE & Business travelers,
- **Brussels’ MICE visitors brand experience** mapping competitiveness, drivers and obstacles to post-visit recommendation and repeat visit for leisure, with several standard KPIs comparable to our database TRAVELSAT.

This approach will reveal a complete picture on both **image and experiential competitive DNAs of Brussels** among actual and potential visitors.
Methodological Approach

Sampling Definition

- **7 Markets**: Belgium, Germany, UK, Spain, France, NL, US.
- **"Potential visitors" sample**: business travelers in Europe, defined as: "individuals aged 18+ traveling abroad at least once a year for professional reasons (meetings, conventions, conferences, fairs, business events and incentives), including same-day trips".
- **"Brussels business visitors" boost sample**: Past 12 months business visitor in Brussels.
- **Source and interviewing mode**: eligible respondents were screened from national access panels and interviewed online via a Web Assisted Interviewing Platform. Quotas on age groups and geographical dispersion will ensure a good diversity of respondent professional profiles, levels and business purposes (individual travelers, congress delegates, meeting and incentives...).
- **Sample sizes.**
  - **"Potential business visitors" sample**: 710 interviews in total (~100 interviews per market).
  - **"Brussels Business" specific sample**: 656 interviews in total (~90 interviews per market).
Business Travellers’ expectations
Mapping “off-work” interest while travelling for business
Sample description – Business travellers

Respondents Profile

- **BE**: 15%
- **DE**: 14%
- **ES**: 14%
- **FR**: 14%
- **UK**: 15%
- **NL**: 14%
- **US**: 14%

**Av. age**: 38

- 50-64: 12%
- 65+: 5%
- 18-24: 16%
- 25-34: 37%
- 35-49: 30%

**Gender Distribution**

- Women: 38%
- Men: 62%

### Frequency / Type of business travels

- **Once a week or more**: 12%
- **1-3 times per month**: 21%
- **Once ev. 2 to 3 months**: 31%
- **Once/twice a year**: 36%

### Sectors they work in

- **IT/Telecom**: 14%
- **Industry, transport, goods…**: 13%
- **Health**: 12%
- **Banking and Finance**: 10%
- **Construction, building**: 8%
- **Distribution**: 8%
- **Collectivity Services**: 7%
- **Media**: 3%
- **Other**: 25%

---

**Sectors**

- Media
- Collectivity Services
- Construction, building
- Distribution
- Banking and Finance
- Health
- Industry, transport, goods…
- IT/Telecom

**Meetings**

- Regularly: 43%
- Occasionally: 45%
- Never or almost never: 12%

**Congress / conferences**

- Regularly: 27%
- Occasionally: 47%
- Never or almost never: 27%

**Fairs / exhibitions**

- Regularly: 26%
- Occasionally: 46%
- Never or almost never: 28%

**Seminars / conventions**

- Regularly: 24%
- Occasionally: 55%
- Never or almost never: 21%

**Incentives**

- Regularly: 22%
- Occasionally: 42%
- Never or almost never: 35%
Favorite “off-work” activities
While travelling for business

As part of business trips, excluding your professional obligations, what do you enjoy doing most when you get the chance?

- Enjoying the city’s environment (landscapes, architecture..) 40%
- Discovering the local cuisine 39%
- Shopping 36%
- Strolling through the streets 33%
- Visiting museums and cultural sites 26%
- Relaxing (Spa, well-being, etc.) 23%
- Taking a guided tour of the city 23%
- Enjoying the nightlife with colleagues (bars, clubs, etc.) 23%
- Taking part in cultural events (theatre, concert, cinema, shows,..) 21%
- Meeting the locals and discovering their way of life 20%
- Enjoying the amenities of your hotel (gym, entertainment, etc.) 20%
- Taking part in sporting events 11%
- Practising your favourite sport 9%

Easy enjoyable and picturesque experiences

Business travelers quote picturesque experiences as much as the “must-do” off-work activities (cuisine, shopping...), and more than pure cultural activities. The willingness to “treat themselves” after a hard day of work is also well present.
Favorite “off-work” activities
While travelling for business

As part of business trips, excluding your professional obligations, what do you enjoy doing most when you get the chance?

<table>
<thead>
<tr>
<th>Activity</th>
<th>BE</th>
<th>DE</th>
<th>ES</th>
<th>FR</th>
<th>GB</th>
<th>NL</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landscapes, architecture</td>
<td>42%</td>
<td>31%</td>
<td>43%</td>
<td>38%</td>
<td>42%</td>
<td>48%</td>
<td>36%</td>
</tr>
<tr>
<td>Local cuisine</td>
<td>41%</td>
<td>44%</td>
<td>47%</td>
<td>40%</td>
<td>38%</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>Shopping</td>
<td>32%</td>
<td>27%</td>
<td>48%</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
<td>42%</td>
</tr>
<tr>
<td>Strolling through the streets</td>
<td>29%</td>
<td>32%</td>
<td>47%</td>
<td>32%</td>
<td>28%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Visiting museums / cultural sites</td>
<td>24%</td>
<td>27%</td>
<td>26%</td>
<td>29%</td>
<td>28%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Nightlife with colleagues</td>
<td>16%</td>
<td>29%</td>
<td>26%</td>
<td>25%</td>
<td>25%</td>
<td>17%</td>
<td>25%</td>
</tr>
<tr>
<td>Guided tour of the city</td>
<td>25%</td>
<td>18%</td>
<td>28%</td>
<td>24%</td>
<td>23%</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Relaxing (Spa, well-being...)</td>
<td>29%</td>
<td>25%</td>
<td>19%</td>
<td>27%</td>
<td>25%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>Cultural events</td>
<td>17%</td>
<td>27%</td>
<td>15%</td>
<td>20%</td>
<td>25%</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>Enjoying hotel's amenities</td>
<td>18%</td>
<td>19%</td>
<td>20%</td>
<td>20%</td>
<td>19%</td>
<td>15%</td>
<td>28%</td>
</tr>
<tr>
<td>Meeting locals / way of life</td>
<td>20%</td>
<td>14%</td>
<td>17%</td>
<td>19%</td>
<td>16%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Sporting events</td>
<td>7%</td>
<td>11%</td>
<td>19%</td>
<td>10%</td>
<td>5%</td>
<td>7%</td>
<td>15%</td>
</tr>
<tr>
<td>Favourite sport</td>
<td>14%</td>
<td>8%</td>
<td>7%</td>
<td>9%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Cultural specificities to address

While the picturesque aspect is mainstream in each market, each nationality shows special affinities with activities that are worth being promoted specifically and programmed in MICE events.
“Off-work” memorable experiences while travelling for business

Memorable top of mind experiences are based on picturesque and tasty experiences where the atmosphere of the place / moment matter. Atypical or exclusive activities are also part of the best travel business souvenirs, with people interaction acting as an efficient trigger in top.

During a trip to Barcelona I had a chance to see many of the outstanding and unusual architectural structures by Gaudi, including La Sagrada Familia, Casa Vicens, La Pedrera and others. It was just awesome to see these buildings in person after having seen pictures and video. La Sagrada Familia was especially breath taking to see in real life.

An experience of life of a day and a night at the inhabitant in the Japanese countryside (250kms from Tokyo) where I lived in the pure Japanese tradition, whether in housing and gastronomy.

Absolutely loved having a shopping day in new York, amazing, the atmosphere, so Christmassy, truly wonderful.

I saw kinky boots in London and the play was fantastic and the theatre was very nice.

On a trip to Bruges, Belgium, I went on a half day bicycle tour around the outskirts of town, through farmlands, villages and the city itself. It was lovely and the tour guide gave much historical information as we toured.

I went to Dublin, and me and a small group of my work colleagues went to a local pub, and participated in a Calleigh. We had a few drinks of some Guinness and real Irish whiskey.

My company hired out Disney world MGM studios in LA. They opened some of the rides and we had a huge party in the theme park just for our company. It was an amazing experience that made us all feel really special.

On a business trip to Budapest, coincided with the Olympic Games and all my team and I went to see a game of Spain at one of the squares of the city where they broadcast it.

In London I was greedy in a way that I never felt before the people was very considerate and very loving and caring a very nice visit.

Cheese tasting in Amsterdam.

I enjoyed visiting Sentosa island in Singapore. It was surreal to travel across the ocean via cable car.

Budapest and Prague were particularly interesting and enjoyable. Great architecture.

The city itself (Barcelona) is extraordinary, the atmosphere is really welcoming.

The sentiment trend chart shows:
- Atmosphere
- Hospitality
- Scenery (landscapes, views)
- Sights and architecture
- Gastronomy
- Leisure
Brussels competitive image
Familiarity – Attractiveness - Brand perception
Brand Familiarity Level

Brussels records a high and similar level of familiarity for both personal and professional purposes, above Copenhagen and Vienna and very comparable to Amsterdam. Barcelona has massively gained familiarity in leisure purposes compared to business.
Business travellers can make a conception of what Brussels may offer to visitors, but the Belgian capital city level of attractiveness –though positive– stands below the competition.
### Brand Familiarity and Appeal - Benchmarking

#### Brussels vs competition

<table>
<thead>
<tr>
<th></th>
<th>Professional visit</th>
<th>Personal visit</th>
<th>Tourism offer knowledge</th>
<th>Appeal as business trip destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amsterdam</td>
<td>39%</td>
<td>53%</td>
<td>71%</td>
<td>67%</td>
</tr>
<tr>
<td>Barcelone</td>
<td>33%</td>
<td>58%</td>
<td>71%</td>
<td>74%</td>
</tr>
<tr>
<td>Bruxelles</td>
<td>42%</td>
<td>49%</td>
<td>68%</td>
<td>49%</td>
</tr>
<tr>
<td>Copenhague</td>
<td>23%</td>
<td>29%</td>
<td>54%</td>
<td>56%</td>
</tr>
<tr>
<td>Londres</td>
<td>52%</td>
<td>63%</td>
<td>81%</td>
<td>74%</td>
</tr>
<tr>
<td>Paris</td>
<td>47%</td>
<td>67%</td>
<td>84%</td>
<td>74%</td>
</tr>
<tr>
<td>Vienne</td>
<td>23%</td>
<td>39%</td>
<td>60%</td>
<td>62%</td>
</tr>
</tbody>
</table>

A gap in attractiveness

Though positive in absolute value, the Brussels attractiveness is over-performed by the competition, including from destinations having a similar or lower level of familiarity like Amsterdam or Vienna.
Though Brussels may lack of overall attractiveness and originality for a business trip (and incentives in particular), its international reputation gives it fit a solid image of an easy, accessible and safe city able to host large MICE events associated with key sectors, offering also a lot to see and do outside of work.

**Competitive Brand Image - Brussels**

Brussels seen as business travel destination

**Highest attributes**

Associated more frequently or more than other cities

- Easy to access
- Well suited for large events (trade shows, international conferences) and seminars / contentions
- Has a lot to see and do outside of work
- Safe, can be visited without risks
- Set aside from mass tourism / crowds
- Legal and International Institutions
- Pharmacy/Health
- Banking and Finance
- Biological Sciences
- Defense and Arms
- Education and Training

**Lowest attributes**

Associated less frequently or less than other cities

- Easy to get around
- Well suited for motivational/team building trips
- Original, unusual
- Arts/Creative Industry
- Leisure, entertainment and tourism
Image of Brussels on “off-work” favorite activities
While travelling for business

Concerning “out of work” activities you like to do when you travel abroad, how would you rate the attractiveness of Brussels in comparison with other European cities?

Brussels is seen as attractive for...

<table>
<thead>
<tr>
<th>Activity</th>
<th>Brussels</th>
<th>other European cities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking part in cultural events</td>
<td>76%</td>
<td>21%</td>
</tr>
<tr>
<td>Visiting museums and cultural sites</td>
<td>71%</td>
<td>26%</td>
</tr>
<tr>
<td>Shopping</td>
<td>67%</td>
<td>36%</td>
</tr>
<tr>
<td>Discovering the local cuisine</td>
<td>63%</td>
<td>39%</td>
</tr>
<tr>
<td>Enjoying the nightlife with colleagues</td>
<td>63%</td>
<td>23%</td>
</tr>
<tr>
<td>Taking a guided tour of the city</td>
<td>60%</td>
<td>23%</td>
</tr>
<tr>
<td>Meeting the locals and discovering their way of life</td>
<td>58%</td>
<td>20%</td>
</tr>
<tr>
<td>Strolling through the streets</td>
<td>58%</td>
<td>20%</td>
</tr>
<tr>
<td>Practising your favourite sport</td>
<td>58%</td>
<td>9%</td>
</tr>
<tr>
<td>Enjoying the amenities of your hotel</td>
<td>57%</td>
<td>20%</td>
</tr>
<tr>
<td>Taking part in sporting events</td>
<td>57%</td>
<td>11%</td>
</tr>
<tr>
<td>Enjoying the city’s environment</td>
<td>55%</td>
<td>40%</td>
</tr>
<tr>
<td>Relaxing (Spa, well-being, etc.)</td>
<td>45%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Note: The chart shows the percentage of respondents who rated Brussels as attractive compared to other European cities.

Opportunities of differentiation

Brussels enjoy a positive image on some of the key pillars of expectations (shopping, cuisine) and on the cultural attribute, a less expected but differentiating driver. It suffers however from a less positive perception about it’s environment (while it’s the top expectations drivers) and ability to offer relaxing experiences (spa, wellness...).
Business to Leisure conversion
Mapping drivers and obstacles
Brussels business travelers – Sample profile

**Profile**

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;24</td>
<td>18%</td>
</tr>
<tr>
<td>25-34</td>
<td>32%</td>
</tr>
<tr>
<td>35-49</td>
<td>31%</td>
</tr>
<tr>
<td>50-64</td>
<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Av. age**

38

<table>
<thead>
<tr>
<th>BE</th>
<th>DE</th>
<th>ES</th>
<th>FR</th>
<th>UK</th>
<th>NL</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>14%</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
<td>15%</td>
<td>14%</td>
<td>15%</td>
</tr>
</tbody>
</table>

**Sectors they work in**

- IT/Telecom: 12%
- Industry, transport, goods: 14%
- Health: 13%
- Banking and Finance: 11%
- Construction, building: 8%
- Distribution: 9%
- Collectivity Services: 11%
- Media: 4%
- Other: 17%

**Frequency / Type of business travels in Brussels**

**In the past 12 months...**

- Once: 40%
- 2 times: 24%
- 3 times: 12%
- 4 times: 9%
- 5 times: 5%
- 6 times+: 10%

**Last trip...**

- Meetings: 43%
- Seminars / conventions: 31%
- Fairs / exhibitions: 25%
- Congress / conferences: 22%
- Incentives: 9%

**Came by...**

- Car: 29%
- Plane: 42%
- Train: 33%
Brussels business travelers behaviors

Within 3 days in average, business visitors in Brussels manage to take time for the 3 must-do “strolling around + shopping + food experience”, plus various cultural, picturesque, guided and non-guided activities. A fairly large part of event participants received touristic information before or during their stay.

Stay length average = 3,3 days

<table>
<thead>
<tr>
<th>Stay Length</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 day</td>
<td>19%</td>
</tr>
<tr>
<td>2 days</td>
<td>24%</td>
</tr>
<tr>
<td>3 days</td>
<td>24%</td>
</tr>
<tr>
<td>4 days</td>
<td>13%</td>
</tr>
<tr>
<td>5 days</td>
<td>7%</td>
</tr>
<tr>
<td>6 days+</td>
<td>13%</td>
</tr>
</tbody>
</table>

61% received touristic info on Brussels before their event

... and 66% during their event

Off-work activities taken during the stay

- Strolling through the streets: 48%
- Shopping: 44%
- Discovering the local cuisine: 44%
- Enjoying the city's environment (landscapes, architecture..): 32%
- Enjoying the nightlife with colleagues (bars, clubs, etc.): 30%
- Visiting museums and cultural sites: 26%
- Taking a guided tour of the city: 23%
- Meeting the locals and discovering their way of life: 22%
- Enjoying the amenities of your hotel (gym, entertainment,...): 22%
- Relaxing (Spa, well-being, etc.): 19%
- Taking part in cultural events (theatre, concert, cinema,...): 18%
- Practising your favourite sport: 8%
- Taking part in sporting events: 8%
Beyond iconic experiences (frites, gaufres, bières, Atomium, Grand-Place etc...), memorable experiences in Brussels often refer to the atmosphere the city generates, its "not that big / village-type" sense of place that can be found and where pleasant and fun activities can take shared with people.

My entire visit to Brussels was incredibly memorable. I had a lot of free time on my hands and was able to explore the city. This city was gorgeous women were gorgeous, food was delicious... infrastructure was Modern and fresh. I think Belgium is one of the most underrated tourist destinations in Europe.

It's a beautiful city I particularly enjoyed walking around and taking photographs of the architecture there's some wonderful museum's I particularly liked the Magritte Museum.

I really liked just strolling through the streets and looking around on my own. It's nice to be in a city that is easy to navigate and has easy access to public transportation.

I love the theatre there, it's very pleasant and fun in an atypical and minimalist setting that I like. I really enjoyed the local cuisine. There was so much variety and flavor!

I love the people there, it's pretty nice. My wallet fell down the street, and they warned me. Later, a person saw me lost, and he asked me if I needed help, to say yes, he gladly offered to help me.

Being able to stroll through the narrow streets of the old part of Brussels, full of small restaurants and many bars. It is very nice to have the feeling of being in a small town when in reality you are in the center of the city.

Beauty of Grote Markt and surroundings, pleasant crowds and light show on Grote Markt. Attractiveness of Manneke Pis among foreign colleagues. The natural of the people of Brussels themselves.

Visit the Atomium, and the science museum. At night the Atomium is magical, and at sunset. The Christmas markets are also artistic and wonderful.
Business-to-leisure Impact & Conversion

The conversion rate and willingness to recommend or revisit for leisure indicate that the business experience in the city has a positive impact on leisure and generate advocacy behaviors once back home. However, the relatively large share of uncertain statements vs clear enthusiasm within positive opinions, may question the level of satisfaction.

Did your business trip experience in Brussels make you want to come back to visit the city as a tourist?

- Yes, definitely: 41%
- Yes, somewhat: 50%
- No, not at all: 1%
- No, not really: 8%

52% prolonged their stay in Brussels to make the most of the city as a tourist.

Would you recommend Brussels to your friends and family as a place to visit (city break/leisure break)?

- Yes, certainly: 42%
- Yes, probably: 41%
- Maybe: 13%
- No, prob+cert. not: 4%
- No, not at all: 1%
- No, not really: 8%

41% say their business trip definitely made them want to come back to visit the city as a tourist.

42% would certainly recommend Brussels to friends and family as a place to visit (city break/leisure break).
Drivers of leisure repeat visit after a business trip in Brussels

Repeat visit for leisure drivers are often associated with the idea that Brussels has more to be discovered on a cultural and food offers, as well as specific topic that visitor can learn from (such as architectural features that create an element of surprise). Practicality is also a trigger for close markets.

Good overall experience
Leisure activities
Lots more to see/exp

Architecture
Hospitality
Gastronomy

I just want to eat the food again and try new food. There is nothing like it where I am from

I believe in civility and the kindness of the people. The most important factor was mostly the people they were very welcoming to us and their culture is amazing

I just know from the guide books that I read that there was a lot to do... Way more than I could possibly done on the downtime during a business trip

The markets, the museums, the Atomium, and the magnificence of the city and its parks

Because of the good hospitality and nice people

If I’d have known how much there was to do I’d have booked an extra day, sadly I didn’t get to go to a lot of places I wanted to, in particular the museum’s and cultural events but I plan to go for short break in April with my partner

Because I felt the city was very nice .... great sights and nightlife still needs to be explored in detail

I really liked the experience, it seems to me a beautiful city, with thousands of possibilities

I liked the Belgian waffles and the fries very much. Also chocolate and the beer

I find the city great and comfortable

I believe my children would enjoy this place next time I go to Brussells, as they enjoy learning all about new architecture.
If you get the chance to come back to Brussels for professional reasons, how interested would you be in the following experiences?

<table>
<thead>
<tr>
<th>Experience</th>
<th>Interest Level (Net %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>An evening in the city’s hotspots: cafés, city-centre bars, etc.</td>
<td>66%</td>
</tr>
<tr>
<td>Visiting an iconic monument of the city: Town Hall, Atomium, etc.</td>
<td>64%</td>
</tr>
<tr>
<td>A nature outing in the city: parks, forests, etc.</td>
<td>61%</td>
</tr>
<tr>
<td>An original gastronomic experience: dinner in a tram, dinner in the sky, etc.</td>
<td>58%</td>
</tr>
<tr>
<td>A family activity: Mini Europe, Museum of Musical Instruments, Natural Science Museum,…</td>
<td>51%</td>
</tr>
<tr>
<td>An Art Nouveau/Art Deco experience: visiting an Art Nouveau house, Horta Museum, etc.</td>
<td>49%</td>
</tr>
<tr>
<td>Visiting European institutions: Parlementarium, Museum of European History, etc.</td>
<td>46%</td>
</tr>
<tr>
<td>A Surrealist experience: Magritte Museum, Maison Magritte, etc.</td>
<td>46%</td>
</tr>
<tr>
<td>A Contemporary Art exhibition: MIMA, street art routes, etc.</td>
<td>43%</td>
</tr>
<tr>
<td>A comic book experience: Comic Book Museum, City Comic Book routes (mural frescos,…</td>
<td>36%</td>
</tr>
<tr>
<td>A jazz concert in a lively district</td>
<td>34%</td>
</tr>
<tr>
<td>An experience along the theme of Fashion and Design: ADAM Museum, workshop visits,…</td>
<td>32%</td>
</tr>
</tbody>
</table>

Beyond exploration of the possibly “more than expected” vibrant life in the city, business visitors would love to investigate the natural assets in (around) Brussels. Interest expressed for specific “niche” experiences such as Art Nouveau/Art Deco, Surrealism and Contemporary Art exhibition is also strong.
Obstacles of leisure extension in Brussels

Obstacles for a leisure extension are more due to a lack of time of planning possibilities than interest in the city in essence. The language barrier for accessing cultural activities, though not mainstream, is expressed. A few signals about safety feeling are also mentioned.

<table>
<thead>
<tr>
<th>No time</th>
<th>Work constraints</th>
<th>No interest</th>
<th>Language barrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is too similar to my city, I prefer to visit other exotic countries</td>
<td>I needed to go back home. I promised my family to stay max 4 days</td>
<td>I had transportation back which could not be changed</td>
<td>I am not interested in visiting big cities</td>
</tr>
<tr>
<td>I had the whole day a meeting and after that I went home, no time to be a tourist in a normal working day</td>
<td>I had to go back to the office for the next morning</td>
<td>Other events were scheduled in my calendar</td>
<td>I had more meetings back in the office and in the middle of the week</td>
</tr>
<tr>
<td>I do not live close by Brussels but I prefer other cities</td>
<td>I know already</td>
<td>Please keep these streets safe!</td>
<td>Because the meeting ended late</td>
</tr>
<tr>
<td>No need, I go often to Brussels</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I already knew Brussels. I was previously a few days on vacation here</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I prefer holidays out of cities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Difficulty accessing the city and non-security</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TRAVELSAT® Competitive Index
Benchmarking business travelers’ experience
TRAVELSAT® applies a standard proprietary scoring from the 1 to 10 satisfaction rating scale used in the questionnaire.

The index reflects the level satisfaction for each criteria rated and typically fluctuates from -50 to 400.

Scores from extremely satisfied or dissatisfied visitors (likely to greatly influence the destination reputation) are more valued in the scoring Vs arithmetic averages.

The primary purpose of Indexes is to benchmark destinations’ experience quality Vs norms and competition.
While rated less accessible and slightly less hospitable than in other cities, public transportation prices are competitive. Satisfaction with taxi services, if low in absolute level, reach a score in line with the competitive norm.
The airport access reaches satisfying levels but Amsterdam (and Copenhagen) pushes high the competitive norm... The city is relatively easy to get oriented in, but the road infrastructure quality does not match the competition. Copenhagen and Amsterdam surpass widely the norm.
The quality perceived in Brussels meeting rooms and venues (including all convention centers, hotels and other venues) does not match the competitive norms for the quality, hospitality and communication infrastructure, with Copenhagen rated as best in class.
If the value for money is rated in line with norms, Brussels hotels for business visitors offer a lower than competition quality level, particularly vs Copenhagen for the staff hospitality levels.
The food experience in Brussels is competitive for business visitors. A push in exceeding expectations for restaurants staff hospitality would help surpassing the average competition.
Brussels is best in class for the shopping value for money perceptions. Improving access to a more diversified range of option would create a full competitive DNA.
CULTURAL AND LEISURE ACTIVITIES

Brussels does not offer the quality level of cultural and leisure activities that rivals do, particularly for “after 7pm” hours. Further guidance and better/safer “environment of the place” would help making up the gap.
Perceptions around locals’ hospitality and safety are rated rather low compared to “champions” in this matter. This aspect is yet essential in building the experience and triggering repeat visit and “conversion”.

**Local Hospitality, Safety Feeling**

<table>
<thead>
<tr>
<th>Location</th>
<th>Local Population Hospitality</th>
<th>Ease of Communication with Locals</th>
<th>Safety Feeling</th>
<th>Crowds, Convenience for Visiting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copenhagen</td>
<td>157</td>
<td>150</td>
<td>172</td>
<td>131</td>
</tr>
<tr>
<td>London</td>
<td>201</td>
<td>211</td>
<td>239</td>
<td>116</td>
</tr>
<tr>
<td>Vienna</td>
<td>109</td>
<td>120</td>
<td>113</td>
<td>75</td>
</tr>
<tr>
<td></td>
<td>53</td>
<td>75</td>
<td></td>
<td>44</td>
</tr>
</tbody>
</table>
The lack of cleanliness and overall perception of urbanization is an obstacle for creating a sense of place and atmosphere that can foster a positive exploration after work.
While Brussels business visitors are satisfied with their stay in overall, with a score in line with the norm, previously mentioned lack of competitiveness on some essential pillar of experience stop from completely convert satisfaction into conversion and advocacy behaviors.
### Visitor Experience by Business Purposes

**TRAVELSAT Experience Ratings Indexes (all markets consolidated)**

<table>
<thead>
<tr>
<th></th>
<th>Business Meetings</th>
<th>Seminars, conventions</th>
<th>Congress, conferences</th>
<th>Fairs, Trade shows</th>
<th>Incentive trips, Team building</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation quality</td>
<td>143</td>
<td>130</td>
<td>162</td>
<td>154</td>
<td>156</td>
</tr>
<tr>
<td>Food quality</td>
<td>137</td>
<td>151</td>
<td>175</td>
<td>161</td>
<td>150</td>
</tr>
<tr>
<td>Public transport accessibility</td>
<td>146</td>
<td>132</td>
<td>125</td>
<td>128</td>
<td>138</td>
</tr>
<tr>
<td>Taxi service</td>
<td>101</td>
<td>111</td>
<td>103</td>
<td>88</td>
<td>113</td>
</tr>
<tr>
<td>Parking convenience</td>
<td>70</td>
<td>106</td>
<td>137</td>
<td>52</td>
<td>98</td>
</tr>
<tr>
<td>Airport access</td>
<td>162</td>
<td>155</td>
<td>143</td>
<td>140</td>
<td>163</td>
</tr>
<tr>
<td>Signposting</td>
<td>139</td>
<td>132</td>
<td>163</td>
<td>120</td>
<td>155</td>
</tr>
<tr>
<td>Cultural and leisure diversity</td>
<td>171</td>
<td>139</td>
<td>164</td>
<td>142</td>
<td>146</td>
</tr>
<tr>
<td>Nightlife</td>
<td>148</td>
<td>136</td>
<td>139</td>
<td>143</td>
<td>119</td>
</tr>
<tr>
<td>Shopping range</td>
<td>171</td>
<td>144</td>
<td>163</td>
<td>154</td>
<td>162</td>
</tr>
<tr>
<td>Cleanliness in streets</td>
<td>113</td>
<td>95</td>
<td>107</td>
<td>124</td>
<td>147</td>
</tr>
<tr>
<td>Architecture, urban development</td>
<td>126</td>
<td>126</td>
<td>111</td>
<td>114</td>
<td>150</td>
</tr>
<tr>
<td>Locals' hospitality</td>
<td>112</td>
<td>109</td>
<td>103</td>
<td>121</td>
<td>163</td>
</tr>
<tr>
<td>Safety feeling</td>
<td>127</td>
<td>114</td>
<td>110</td>
<td>134</td>
<td>143</td>
</tr>
<tr>
<td>Venue quality</td>
<td>149</td>
<td>118</td>
<td>142</td>
<td>155</td>
<td>135</td>
</tr>
<tr>
<td>Venue hospitality</td>
<td>161</td>
<td>137</td>
<td>171</td>
<td>165</td>
<td>149</td>
</tr>
</tbody>
</table>

**Would certainly recommend Brussels to friends and family**

|                          | 42%               | 40%                   | 47%                   | 40%                | 43%                           |

**Business trip experience in Brussels definitely make want to come back as a tourist**

|                          | 46%               | 38%                   | 48%                   | 44%                | 36%                           |

Large events have a larger propensity to trigger positive experiences and potential business to leisure conversion. Fairs and trade shows lower ratings for transportation facets. Incentive trips, though managing better the context of visiting (environment, safety), only partly convince for leisure re-visiting.
Take-aways
Take-Aways
Overall Expectations and Image among Potential Travellers

Business travelers expect **picturesque experiences** and typical after-work activities (**food, shopping…**), more than conventional cultural activities. “Treating myself” after a hard day of work is also well present in mind. Yet **favorite activities vary per market**, offering **segmentation possibilities in social programs**.

The “sense of place” widely impacts visit memorability, including picturesque and tasty experiences lived special atmosphere. In this context, the **cleanliness, safety feeling** and people interactions have a **massive influence in the business to leisure conversion**.

Brussels records a **high level of familiarity** for both personal and professional purposes. Yet the **level of attractiveness** as a business trip destination – if positive - is **over-performed by the competition**, including from destinations having a similar or even lower level of familiarity like Amsterdam or Vienna.

Despite a lack of spontaneous attractiveness for a business trip, **Brussels international / EU affairs “status” fuels expectations** of an easy, accessible and safe city able to host large MICE events associated with key sectors (**Health, Finance, Biological Sciences, Defense, Education**) and a lot to see and do after work.

Brussels enjoys a **positive image on key expectations** (shopping, cuisine) and **differentiates on the cultural attribute** (a less expected but differentiating driver). **Brussels suffers however** from a less positive perception about it’s **environment** and **ability to offer relaxing experiences** (spa, wellness...).
Take-Aways
Business to Leisure conversion

6. Staying 3 days in average, **1 in 2 business visitors in Brussels prolonged their stay** and took time for strolling around and taking shopping, food, cultural, picturesque, guided and non-guided activities. **About 2 in 3 events’ participants received touristic information** before or during their stay.

7. **Beyond iconic experiences** (frites, waffels, beer, Atomium, Grand-Place etc.), memorable experiences in Brussels often refer to the **atmosphere the city generates**, its "not that big / village-type" places that can be found and where **pleasant and fun activities can take place and be shared with other people**.

8. The business experience in Brussels has **an overall positive impact on leisure and generate advocacy behaviors** once back home. However, the **large share of “soft statements”** compared to “clear enthusiasm” measured in other cities questions the competitive level of satisfaction.

9. **Beyond exploring the vibrant life in the city, business visitors would also love experiencing the natural assets in (and around) Brussels.** Interest expressed for specific “niche” experiences such as Art Nouveau/Art Deco, Surrealism and Contemporary Art exhibition is also strong.

10. **Obstacles for a leisure extension** are more related to a lack of time of planning possibilities than a lack of interest in the city in itself. The **language barrier** for accessing cultural activities, though not mainstream, is expressed. A few mentions about **safety feeling** are also mentioned...
Take-Aways
Brussels Business Travellers’ Experience Quality

The overall satisfaction is in line with competitive average but **lower ratings on key pillars** of experience (meeting rooms and venues quality, Accommodation hospitality) **stop visitors from fully convert satisfaction into leisure conversion** and post-visit advocacy.

An effort for **improving the “sense of place”** is required for **matching expected image** and making up the competitive gap: cleanliness, safety feeling, locals’ hospitality and perception of urbanization are **obstacles for creating the right atmosphere that fosters an exploration after work**.

If **Food and Shopping experiences achieve competitive ratings** among business travelers, the **cultural and leisure offer**, particularly for “after 7pm” activities, do not fully reach competition levels. Further guidance and better / safer environment would help match the competition.

The transportation experience reaches **decent ratings but lacks of consistency**: airport access fairly satisfies but does not rival Copenhagen or Amsterdam, public transport prices are competitive but rated below norms for hospitality and accessibility, The city is reported as relatively easy to get oriented in, but the road infrastructure quality does not match the competition.

**Large events** have a larger propensity to **trigger positive experiences and business to leisure conversion**. Fairs / trade shows have lower ratings for transportation. Incentive trips, though managing better the context of visiting (environment, safety), only partly convince for leisure re-visiting.
Market Dashboard
Key indicators per market
FRENCH BUSINESS TRAVELLERS PROFILING

BRUSSELS IMAGE Among potential travelers

Appeal (net %) as business trip destination

- LON: 80%
- BAR: 66%
- PAR: 64%
- AMS: 61%
- CPH: 48%
- BXLS: 45%
- VIEN: 43%

Image as Business destinations
- Well organised for welcoming business travelers
- Easy to access
- High quality meeting spaces
- Well suited for large events
- Safe, can be visited without risks
- Welcoming, open

Sector Affinities
- Banking and Finance
- Arts/Creative Industry
- Legal and International Institutions
- Leisure, entertainment and tourism

BRUSSELS EXPERIENCE Among actual visitors

- Days in average: 3.1
- 48% received touristic info on Brussels before their event and 63% during it.
- 38% Prolonged their stay in Brussels to make the most of the city as a tourist
- 47% Would certainly recommend Brussels to relatives as a place to visit
- 44% say their business trip definitely made them want to come back to visit the city as a tourist

TOP 10 Favorite activities while on business trip

- Local cuisine: 40%
- Landscapes, architecture: 38%
- Shopping: 35%
- Strolling through the streets: 32%
- Visiting museums / cultural sites: 29%
- Relaxing (Spa, well-being...): 27%
- Nightlife with colleagues: 25%
- Guided tour of the city: 24%
- Enjoying hotel’s amenities: 20%
- Cultural events: 20%

LEISURE DRIVERS Among potential travellers

Interest Levels in specific Brussels activities

- Visiting an iconic monument: 66%
- An evening in the city’s hotspots: 64%
- A nature outing in the city: 56%
- Comic Book: 50%
- Jazz concert: 46%
- Surrealism: 46%
- An original gastronomic experience: 46%
- A family activity: 38%
- European institutions: 30%
- Fashion and Design: 30%
- Contemporary Art: 26%
- Art Nouveau/Art Deco: 22%

Best satisfaction ratings
- Shopping value for money
- Shopping range
- Ease of communication with local people
- Shops’ staff hospitality
- Shops’ opening days/hours
- Accommodation hospitality
- Venues’ staff hospitality
- Safety feeling
- Taxi service
- Guided tours, excursions

Lowest satisfaction ratings
- Shopping value for money
- Shopping range
- Ease of communication with local people
- Shops’ staff hospitality
- Shops’ opening days/hours
- Accommodation hospitality
- Venues’ staff hospitality
- Safety feeling
- Taxi service
- Guided tours, excursions
### Top 10 Favorite activities while on business trip

<table>
<thead>
<tr>
<th>Activity</th>
<th>BXLS</th>
<th>17%</th>
<th>BXLS</th>
<th>22%</th>
<th>BXLS</th>
<th>25%</th>
<th>BXLS</th>
<th>30%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local cuisine</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strolling through the streets</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relaxing (Spa, well-being...)</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guided tour of the city</td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting museums / cultural sites</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting locals / way of life</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enjoying hotel’s amenities</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural events</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Interest Levels in specific Brussels activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>BXLS</th>
<th>12%</th>
<th>BXLS</th>
<th>17%</th>
<th>BXLS</th>
<th>24%</th>
<th>BXLS</th>
<th>31%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting an iconic monument</td>
<td>12%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>An evening in the city’s hotspots</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>An original gastronomic experience</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A nature outing in the city</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comic Book</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>European institutions</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A family activity</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surrealism</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contemporary Art</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fashion and Design</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Art Nouveau/Art Deco</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jazz concert</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Best satisfaction ratings

- Cultural and leisure diversity
- Shopping range
- Venue quality and staff hospitality
- Communication infrastructure
- Food diversity
- Safety feeling
- Taxi service
- Road infrastructure
- Cleanliness in streets
- Parking convenience

### Lowest satisfaction ratings

- Safety feeling
- Taxi service
- Road infrastructure
- Cleanliness in streets
- Parking convenience

---

**BELGIAN BUSINESS TRAVELLERS PROFILING**

### Brussels Experience

- **25%** received touristic info on Brussels before their event and **30%** during it.

- **22%** prolonged their stay in Brussels to make the most of the city as a tourist.

- **24%** would certainly recommend Brussels to relatives as a place to visit.

- **24%** say their business trip definitely made them want to come back to visit the city as a tourist.

### Brussels Image

- BXLS: 43%

### Image as Business destinations

- Easy to access
- High quality meeting spaces
- Well suited for seminars
- Well suited for large events
- Well organised for welcoming business travellers
- High-quality accommodation offering

### Sector Affinities

- Legal and International Institutions
- Education and Training
- Defence and Arms
- Banking and Finance

---

**TRAVELSAT Competitive Index**

### Appeal (net %) as business trip destination

<table>
<thead>
<tr>
<th>Country</th>
<th>BXLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>LON</td>
<td>84%</td>
</tr>
<tr>
<td>PAR</td>
<td>78%</td>
</tr>
<tr>
<td>AMS</td>
<td>77%</td>
</tr>
<tr>
<td>BAR</td>
<td>73%</td>
</tr>
<tr>
<td>VIEN</td>
<td>71%</td>
</tr>
<tr>
<td>CPH</td>
<td>59%</td>
</tr>
<tr>
<td>BXLS</td>
<td>43%</td>
</tr>
</tbody>
</table>

---

**BRUSSELS EXPERIENCE**

- **1,5** days in average

---

**LEISURE DRIVERS**

- Among potential travellers

### TOP 10 Favorite activities while on business trip

- Landscapes, architecture: 42%
- Local cuisine: 41%
- Shopping: 32%
- Strolling through the streets: 29%
- Relaxing (Spa, well-being...): 29%
- Guided tour of the city: 25%
- Visiting museums / cultural sites: 24%
- Meeting locals / way of life: 20%
- Enjoying hotel’s amenities: 18%
- Cultural events: 17%
GERMAN BUSINESS TRAVELLERS PROFILING

BRUSSELS IMAGE

 Appeal (net %) as business trip destination

<table>
<thead>
<tr>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>LON</td>
<td>82%</td>
</tr>
<tr>
<td>BAR</td>
<td>74%</td>
</tr>
<tr>
<td>VIEN</td>
<td>69%</td>
</tr>
<tr>
<td>AMS</td>
<td>68%</td>
</tr>
<tr>
<td>PAR</td>
<td>59%</td>
</tr>
<tr>
<td>CPH</td>
<td>57%</td>
</tr>
<tr>
<td>BXLS</td>
<td>39%</td>
</tr>
</tbody>
</table>

Image as Business destinations
- Well suited for large events
- Up to date with technology
- Set aside from mass tourism/crowds
- Well organised for welcoming business travelers

Sector Affinities
- Legal and International Institutions
- Leisure, entertainment and tourism
- Banking and Finance
- Pharmacy/Health

BRUSSELS EXPERIENCE

 Days in average | 3,7
59% received touristic info on Brussels before their event and 65% during it.

32% say their business trip definitely made them want to come back to visit the city as a tourist

Prolonged their stay in Brussels to make the most of the city as a tourist

Would certainly recommend Brussels to relatives as a place to visit

Best satisfaction ratings
- Food experience
- Cultural shows
- Nightlife
- Airport access
- Shops’ opening days/hours and handicraft
- Cleanliness in streets
- Communication with locals
- Accommodation quality
- Venue quality
- Public transport accessibility

Lowest satisfaction ratings

LEISURE DRIVERs

TOP 10 Favorite activities while on business trip

- Local cuisine: 44%
- Strolling through the streets: 32%
- Landscapes, architecture: 31%
- Nightlife with colleagues: 29%
- Shopping: 27%
- Visiting museums / cultural sites: 27%
- Cultural events: 27%
- Relaxing (Spa, well-being...) 25%
- Enjoying hotel’s amenities: 19%
- Guided tour of the city: 18%

Interest Levels in specific Brussels activities

- Visiting an iconic monument: 6%
- An evening in the city’s hotspots: 50%
- European institutions: 51%
- A nature outing in the city: 45%
- An original gastronomic experience: 29%
- Contemporary Art: 17%
- Comic Book: 17%
- Art Nouveau/Art Deco: 15%
- Surrealism: 15%
- A family activity: 15%
- Jazz concert: 13%
- Fashion and Design: 5%

LEISURE DRIVERS

Among potential traveller
SPANISH BUSINESS TRAVELLERS PROFILING

Image as Business destinations
- Well organised for welcoming business travelers
- Well suited for seminars
- Safe, can be visited without risks
- Up to date with technology
- Clean, well-maintained
- Set aside from mass tourism/crowds

Sector Affinities
- Banking and Finance
- Legal and International Institutions
- Ecology/Green Technology
- Education and Training
- ICT/Technology

BRUSSELS IMAGE Among potential travellers

Barcelona (BAR) 87%
Paris (PAR) 82%
Amsterdam (AMS) 78%
London (LON) 76%
Vienna (VIEN) 69%
Brussels (BRUSLS) 62%
Copenhagen (COP) 62%

BRUSSELS EXPERIENCE Among actual visitors

Days in average 3.5
57% received touristic info on Brussels before their event and 62% during it.

Prolonged their stay in Brussels to make the most of the city as a tourist
69%
Would certainly recommend Brussels to relatives as a place to visit
42%

39% say their business trip definitely made them want to come back to visit the city as a tourist

LEISURE DRIVERS Among potential travellers

TOP 10 Favorite activities while on business trip
- Shopping 48%
- Local cuisine 47%
- Strolling through the streets 47%
- Landscapes, architecture 43%
- Guided tour of the city 28%
- Nightlife with colleagues 26%
- Visiting museums / cultural sites 26%
- Enjoying hotel's amenities 20%
- Relaxing (Spa, well-being...) 19%
- Sporting events 19%

Interest Levels in specific Brussels activities
- An evening in the city's hotspots 83%
- An original gastronomic experience 75%
- Visiting an iconic monument 70%
- A nature outing in the city 67%
- Art Nouveau/Art Deco 61%
- European institutions 59%
- Jazz concert 49%
- Surrealism 49%
- A family activity 45%
- Contemporary Art 43%
- Fashion and Design 42%
- Comic Book 33%

Best satisfaction ratings
- Accommodation quality
- Venue experience
- Signposting
- Cleanliness in streets
- Food quality

Lowest satisfaction ratings
- Accommodation value for money
- Nightlife
- Shopping opening days/hours
- Shopping value for money
- Local people hospitality
UK BUSINESS TRAVELLERS PROFILING

BRUSSELS IMAGE Among potential travellers

Image as Business destinations
- High-quality accommodation offering
- Has a lot to see and do outside of work
- Well suited for seminars
- Well suited for large events
- Clean, well-maintained
- Up to date with technology

Sector Affinities
- Ecology/Green Technology
- Biological Sciences
- Construction and ICI
- Pharmacy/Health
- Leisure, entertainment and tourism

BRUSSELS EXPERIENCE Among actual visitors

Days in average
3.1

58% received touristic info on Brussels before their event and 58% during it.

36%

Prolonged their stay in Brussels to make the most of the city as a tourist

42%

Would certainly recommend Brussels to relatives as a place to visit

46%

say their business trip definitely made them want to come back to visit the city as a tourist

LEISURE DRIVERS Among potential travellers

TOP 10 Favorite activities while on business trip

- Landscapes, architecture
  - 42%
- Local cuisine
  - 38%
- Shopping
  - 35%
- Strolling through the streets
  - 28%
- Visiting museums / cultural sites
  - 28%
- Relaxing (Spa, well-being...)
  - 25%
- Nightlife with colleagues
  - 25%
- Cultural events
  - 25%
- Guided tour of the city
  - 23%
- Enjoying hotel’s amenities
  - 19%

Interest Levels in specific Brussels activities

- An original gastronomic experience
  - 61%
- Visiting an iconic monument
  - 61%
- A family activity
  - 57%
- An evening in the city’s hotspots
  - 51%
- A nature outing in the city
  - 49%
- European institutions
  - 44%
- Jazz concert
  - 42%
- Contemporary Art
  - 42%
- Art Nouveau/Art Deco
  - 36%
- Surrealism
  - 34%
- Comic Book
  - 34%
- Fashion and Design
  - 34%
DUTCH BUSINESS TRAVELLERS PROFILING

BRUSSELS IMAGE

Among potential travellers

- Appeal (net %) as business trip destination
  - LON 76%
  - PAR 75%
  - BAR 72%
  - CPH 61%
  - BXLS 57%
  - VIEN 57%
  - AMS 47%

Image as Business destinations
- Well suited for large events
- Easy to access
- High quality accommodation offering
- Has a lot to see and do outside of work
- Offers high-quality meeting spaces
- Well organised for welcoming business
- Well suited for seminars

Sector Affinities
- Legal and International Institutions
- Banking and Finance
- Education and Training
- Leisure, entertainment and tourism
- Construction and ICI

BRUSSELS EXPERIENCE

Among actual visitors

- Days in average
  - 3.1

- 54% received touristic info on Brussels before their event and 46% during it.

- 32% would certainly recommend Brussels to relatives as a place to visit

- Prolonged their stay in Brussels to make the most of the city as a tourist

- 33% say their business trip definitely made them want to come back to visit the city as a tourist

BEST SATISFACTION RATINGS

- Airport access
- Nightlife
- Shopping range
- Cultural diversity
- Venue hospitality

LOWEST SATISFACTION RATINGS

- Parking convenience
- Environment (cleanliness, urban devt.)
- Road infrastructure
- Safety feeling
- Accommodation quality

TOP 10 Favorite activities while on business trip

- Landscapes, architecture: 48%
- Shopping: 35%
- Strolling through the streets: 31%
- Meeting locals / way of life: 31%
- Local cuisine: 30%
- Visiting museums / cultural sites: 28%
- Relaxing (Spa, well-being...): 24%
- Guided tour of the city: 19%
- Cultural events: 19%
- Nightlife with colleagues: 17%

LEISURE DRIVERS

Among potential travellers

- Interest Levels in specific Brussels activities
  - A nature outing in the city: 59%
  - Visiting an iconic monument: 56%
  - An original gastronomic experience: 49%
  - An evening in the city’s hotspots: 47%
  - European institutions: 45%
  - Art Nouveau/Art Deco: 41%
  - Jazz concert: 40%
  - Comic Book: 35%
  - A family activity: 33%
  - Fashion and Design: 33%
  - Surrealism: 31%
  - Contemporary Art: 15%

Sector Affinities
- Legal and International Institutions
- Banking and Finance
- Education and Training
- Leisure, entertainment and tourism
- Construction and ICI

Competitive Index
US BUSINESS TRAVELLERS PROFILING

BRUSSELS IMAGE Among potential travellers

Image as Business destinations
- Has a lot to see and do outside of work
- “Fun”, where you can have fun outside of work
- Easy to get around
- Safe, can be visited without risks
- Set aside from mass tourism/crowds

BRUSSELS EXPERIENCE Among actual visitors

Days in average
- 4.3

81% received touristic info on Brussels before their event and 75% during it.

Definitely

Prolonged their stay in Brussels to make the most of the city as a tourist

77%

Would certainly recommend Brussels to relatives as a place to visit

62%

81%

GUIDED TOUR OF THE CITY
- Visiting museums / cultural sites
- Nightlife with colleagues
- Cultural events
- Meeting locals / way of life
- Enjoying hotel’s amenities
- Strolling through the streets
- Local cuisine
- Landscapes, architecture

LEISURE DRIVERS Among potential travellers

TOP 10 Favorite activities while on business trip

Shopping 42%
Landscapes, architecture 36%
Local cuisine 32%
Strolling through the streets 31%
Enjoying hotel’s amenities 28%
Meeting locals / way of life 25%
Cultural events 25%
Nightlife with colleagues 25%
Visiting museums / cultural sites 23%
Guided tour of the city 21%

Best satisfaction ratings
- Shopping experience
- Leisure and cultural diversity
- Public transport accessibility
- Nightlife
- Venue quality

Lowest satisfaction ratings
- Taxi service
- Guided tours, excursions
- Food diversity
- Communication infrastructure
- Accommodation hospitality

Sector Affinities
- Leisure, entertainment and tourism
- Legal and International Institutions
- Automobile
- Pharmacy/Health
- Banking and Finance

Top 10 Image as Business destinations

Appeal (net %) as business trip destination

PAR 81%
BAR 74%
AMS 72%
LON 65%
VIEN 56%
BXLS 53%
CPH 41%

81% received touristic info on Brussels before their event and 75% during it.

Prolonged their stay in Brussels to make the most of the city as a tourist

77%

Would certainly recommend Brussels to relatives as a place to visit

62%

72% say their business trip definitely made them want to come back to visit the city as a tourist

72%

Par

Bar

Amsterdam

London

Vienna

Brussels

Copenhagen

Image as Business destinations

- Has a lot to see and do outside of work
- “Fun”, where you can have fun outside of work
- Easy to get around
- Safe, can be visited without risks
- Set aside from mass tourism/crowds

Sector Affinities

- Leisure, entertainment and tourism
- Legal and International Institutions
- Automobile
- Pharmacy/Health
- Banking and Finance

appeal (net %) as business trip destination

par 81%
bar 74%
amsterdam 72%
London 65%
vienna 56%
Brussels 53%
copenhagen 41%

81% received touristic info on brussels before their event and 75% during it.

Prolonged their stay in Brussels to make the most of the city as a tourist

77%

Would certainly recommend Brussels to relatives as a place to visit

62%

72% say their business trip definitely made them want to come back to visit the city as a tourist

72%
Five reasons for working with us
(though we may find plenty of others!)

TCI Research is an independent UNWTO-Awarded market intelligence agency leading in international tourism and travel competitive analysis. It provides public and private players of the visitor economy with innovative research solutions and insights combining conventional surveys with controlled Big Data analysis covering the whole visitor journey.

- We are a global leader in destination competitive analysis.
- Our standpoint is international.
- Our methodologies are endorsed and awarded by reputable tourism organizations.
- We control smart integration of Big Data in combination with traditional surveys.
- Our team is senior and highly flexible.

request@tci-research.com
Text: +32476701125
www.tci-research.com
@TRAVELSAT_index