Know your tourists
How is tourism in Brussels?

Leisure tourists

Bleisure tourists

Ongoing projects
How is tourism in Brussels?

4,76 millions overnights (official) jan-aug  
+12% vs. 2017

1,03 million overnights (AirBnB) jan-jul  
+25% vs. 2017

74,4% occupation rate jan-oct  
+4 pts. vs. 2017

3,30 millions museums & attractions visitors jan-sep  
+4% vs. 2017

89% satisfaction rate jan-oct  
-1 pt. vs. 2017
Evolution of key markets in 2018

- BE - Belgique: 19%
- BR - Brasil: 17%
- CN - Chine: 15%
- DE - Allemagne: 4%
- ES - Espagne: 14%
- FR - France: 9%
- GB - Royaume-Uni: 10%
- IN - Inde: 25%
- IT - Italie: 9%
- JP - Japon: 33%
- NL - Pays-Bas: 7%
- Other: 9%
- RU - Russie: 12%
- US - Etats-Unis: 18%
The history of tourism in Brussels

<table>
<thead>
<tr>
<th>Year</th>
<th>Flags</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018 (M8)</td>
<td>🇧🇪 🇫🇷 🇪🇸 🇬🇧 🇺🇸 🇩🇪 🇮🇹 🇳🇱 🇨🇳 🇸🇪 🇧🇷 🇯🇵 🇷🇺 🇨🇦 🇨🇳 🇪🇸 🇬🇧 🇫🇷 🇧🇪 🇪🇸 🇮🇹 🇪🇸 🇬🇧 🇫🇷 🇧🇪 🇪🇸 🇬🇧 🇫🇷 🇧🇪 🇪🇸 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫🇷 🇪🇸 🇬🇧 🇫ブランド</td>
</tr>
</tbody>
</table>
Distribution of visitors’ overnights (2017)

- **Brussel**: Leisure 47% - Business 53%
- **Sint-Gillis**: Leisure 59% - Business 41%
- **Sint-Joost-ten-Node**: Leisure 24% - Business 76%
- **Elsene**: Leisure 24% - Business 76%
- **Sint-Jans-Molenbeek**: Leisure 96%
- **Etterbeek**: Leisure 70%
- **Anderlecht**: Leisure 5%
- **Evere**: Leisure 8%
- **Schaarbeek**: Leisure 7%
- **Sint-Lambrechts-Woluwe**: Leisure 13%
- **Oudergem**: Leisure 10%
- **Vorst**: Leisure 12%
- **Watermaal-Bosvoorde**: Leisure 13%

Legend: Leisure - Blue, Business - Orange
Attractions & museums – focus by thematics

January – September (1,000 visitors)

- Europe: 838, 777, 720, 766, 558, 508, 547, 530, 401
- Artistic Museums: 448, 412, 401
- Leisure: 357, 412, 401
- Monuments and historical places: 349, 530
- Nature, sciences and technics: 286, 269, 227
- Museums history and heritage: 286, 269, 227

Legend:
- 2018
- 2017
- 2016
How is tourism in Brussels?

- Leisure tourists
- Bleisure tourists
- Ongoing projects
Leisure tourism in 2018 (M8)

2,19 millions bednights

+23% vs. 2017 (M8)

50% of total vs. 46% 2017 (M8)
Leisure tourism in Brussels – 2018 study

1. Who?

Overnight visitors
1,244 interviews conducted in Brussels

One-day visitors
437 interviews conducted in Brussels

National and international
(12 countries)

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

Operated by
KANTAR TNS

Commissioned by
visit.brussels
Age of *staying* visitors by nationality
Leisure visitors – focus

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>

Visitors with kids under 12

Spain: 11.4%, Switzerland: 10.1%, China: 9.8%, Germany: 9.6%, Italy: 8.2%, Netherlands: 7.8%, Japan: 7.8%, United States: 6.3%, United Kingdom: 5.9%, Russia: 4.7%, France: 3.7%, Belgium: 2.9%

35% of the respondents have already visited Brussels

<table>
<thead>
<tr>
<th>First timers</th>
<th>Repeat visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>65%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Repeat visitors by nationality

Belgium: 59.8%, Netherlands: 42.2%, France: 38.5%, Switzerland: 31.6%, United Kingdom: 30.4%, Italy: 30.0%, Germany: 29.8%, Spain: 22.9%, Russia: 15.1%, United States: 8.1%, China: 7.8%, Japan: 5.9%
Motivation to come to 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%
Information about Brussels

**Overnight visitors**

- Websites: 62%
- Social Media: 11%
- TV: 7%
- Magazines: 9%
- Folders: 13%
- Travel Guides: 20%
- Friends, Family: 21%
- Other: 1%
- Not done: 17%

**One-day visitors**

- Websites: 37%
- Social Media: 7%
- TV: 6%
- Magazines: 10%
- Folders: 10%
- Travel Guides: 8%
- Friends, Family: 16%
- Other: 2%
- Not done: 46%
Information about Brussels

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:
- China: 21%
- Japan: 24%
- Europe: 9%

US visitors are the biggest users of travel guides (36% of them vs. 20% global).
Daily expenses in Brussels

**Overnight visitors** 140€

<table>
<thead>
<tr>
<th>Category</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal</td>
<td>€43.77</td>
</tr>
<tr>
<td>Attractions</td>
<td>€13.92</td>
</tr>
<tr>
<td>Transportation</td>
<td>€9.68</td>
</tr>
<tr>
<td>Shopping</td>
<td>€19.82</td>
</tr>
<tr>
<td>Lodging</td>
<td>€52.31</td>
</tr>
</tbody>
</table>

**One-day visitors** 92€

<table>
<thead>
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<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal</td>
<td>€28.01</td>
</tr>
<tr>
<td>Attractions</td>
<td>€20.37</td>
</tr>
<tr>
<td>Transportation</td>
<td>€8.70</td>
</tr>
<tr>
<td>Shopping</td>
<td>€35.31</td>
</tr>
</tbody>
</table>
Daily expenses in Brussels (staying)
Your markets in 3 words

Belgium
- > 45
- Gastronomy
- Culture

France
- Leisure
- Culture
- Young

Spain
- Family
- Kids
- History

Germany
- Business
- Local products
- Classical hotels

UK
- B&B
- Local products
- Brexit

US
- History
- Bleisure
- Online

Italy
- Leisure
- Europe
- Local family

Netherlands
- Car
- B&B
- Last minute

Russia
- Shopping
- Guided tours
- Belgium tour

China
- Social networks
- Group
- Young

India
- Europe
- Growth
- Family

Brazil
- Leisure
- Shopping
- Young
How is tourism in Brussels?

Leisure tourists

Bleisure tourists

Ongoing projects
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?

Which “out of work” activities did you do when you visited Brussels for business purposes last year?

- 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, etc.): 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%
Revisit and recommendation

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

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

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

- Maybe: 13%
- No, probably: 41%
- Yes, certainly: 42%

Competition: 73%

Competitive scope: Barcelona, Amsterdam, London, Copenhagen, Vienna, Paris
How is tourism in Brussels?

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Ongoing projects
Survey in Brussels’ museums

6 museums

- MRAB
- Comic Strip
- Train World
- Natural Sciences
- City of Brussels
- House of European History

Objectives

- Profile of visitors
- Organization of visit
- Satisfaction about visit
- Other activities in Brussels
- Perception about Brussels
Preliminary results – Profile

**Gender of visitors**
- Female: 56.18%
- Male: 43.82%

**Reason of stay in Brussels**
- 85.08% Business
- 14.92% Leisure

**Residence of visitors**
- Belgium: 60.16%
- Other: 39.84%

**Source of information**
- Other Website: 19.32%
- Friends/Family: 20.52%
- Museum Website: 60.16%
Preliminary results – Satisfaction

Would you recommend this museum to friends or relatives?

NPS: 40%

Correlation between items’ satisfaction and recommendation

- Interest of the content: 58%
- Information of the content: 41%
- Interactivity of the content: 38%
- Welcome desk: 27%
- Shop: 19%
- Accessibility: 19%
- General state: 18%
- Catering: 16%
- Opening hours: 16%
- Price: 13%
- Languages available: 12%
Thanks for your attention!

s.detemmerman@visit.brussels