

Market and Trade Profile: Belgium

Belgium





Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Belgian travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Belgian visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at Belgian consumer trends, booking, planning and further travel behaviour of this source market.
- **Chapter 3: Access and travel trade** shows how Belgians travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Belgian travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.



Contents

Chapter 1:

Inbound market statistics

1.1 <u>Key statistics</u>	6
1.2 <u>Visitor demographics</u>	17
1.3 <u>Britain & competitors</u>	21
1.4 <u>Inbound activities</u>	23

Chapter 2:

Understanding the market

2.1 <u>Structural drivers</u>	31
2.2 <u>Consumer trends</u>	35
2.3 <u>Booking and planning</u>	38
2.4 <u>Reaching the consumer</u>	40

Chapter 3:

Access and travel trade

3.1 <u>Access</u>	46
3.2 <u>Travel Trade</u>	50
3.3 <u>Caring for the consumer</u>	55
3.4 <u>Working with VisitBritain</u>	58
3.5 <u>Useful research resources</u>	59





Chapter 1: Inbound market statistics





Chapter 1: Inbound market statistics

Chapter summary

- The Belgian outbound market is forecasted to account for 26 million trips abroad with at least one overnight stay by 2020. The UK was the 6th most popular destination for such trips in 2016, behind France, Spain, the Netherlands, Germany and Italy.
- Belgium ranks globally in 13th place for international tourism expenditure with US\$19.5bn.
- Belgium was the 9th largest inbound source market for the UK for volume and 19th most valuable for visitor spending in 2016.
- For Belgian visits to the UK the spring and summer months were the strongest in 2016.
- 95% from Belgium are 'likely' or 'extremely likely' to recommend Britain for a holiday or short-break.

**2016:
£305m
spend in
UK**

Source: International Passenger Survey by ONS, Oxford Economics (outbound overnight trips), UNWTO



Chapter 1.1: Key statistics

Key insights

- Belgium is the UK's 9th largest source market in terms of visits and 19th most valuable for visitor spending (2016).
- 40% of spending came courtesy of holiday visitors, 28% from business visits in 2016.
- Belgian visits to friends and/or relatives almost matched the 2015 visits record of 249,000 visits in 2016.
- London is the leading destination for a trip to Britain but South East, South West and Scotland are also popular (based on average nights spent in the UK in 2014-2016).
- The most popular activities undertaken by Belgian travellers in Britain include dining in a restaurant, shopping, going to the pub, sightseeing of famous monuments/buildings and socialising with the locals.

**The UK was the
6th most popular
destination for
Belgian outbound
travel (2016)**

Source: International Passenger Survey by ONS, Oxford Economics (outbound overnight trips)



1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US\$bn)	19.5
Global rank for international tourism expenditure	13
Number of outbound overnight visits (m)	23.3
Most visited destination	France

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	995	2,834	246
2008	970	2,929	247
2009	903	2,925	255
2010	1,136	4,002	401
2011	984	3,101	282
2012	1,113	3,551	311
2013	1,174	3,660	383
2014	1,122	3,467	342
2015	1,175	3,940	371
2016	1,048	3,452	305
Share of UK total in 2016	2.8%	1.2%	1.4%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics (outbound overnight trips)



1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	1,048	-11%	9
Nights (000s)	3,452	-12%	18
Spend (£m)	305	-18%	19

In January – September 2017 there were 865,000 visits from Belgium to the UK, up 7% on the same time in 2016. Belgian visitors set a new year-to-date record for spending with £305 million in the first nine months of 2017, up 32% on January – September 2016, already more than Belgians spend in the UK in the whole of 2016.*

Source: International Passenger Survey by ONS, *January – September 2017 based on provisional data

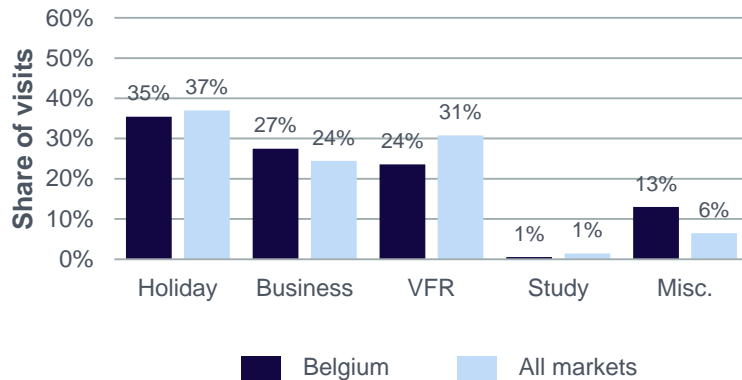
Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	3	£102	£331
Business	2	£134	£297
Visiting friends/relatives	4	£53	£235
All visits	3	£88	£291



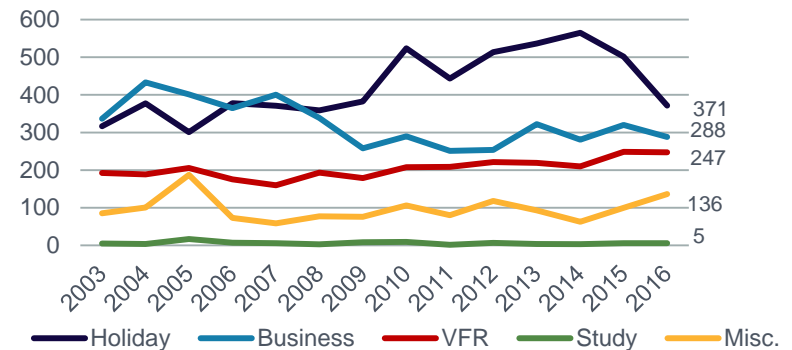
1.1 Key statistics: journey purpose

Journey purpose 2016



- In 2016, 35% of all visits to the UK from Belgium were made for holidays, 27% for business visits, followed by 24% to visit family and/or friends and 13% for miscellaneous visits (above average).
- 80% of holiday visits from Belgium to the UK in 2015 (excl. UK nationals) were made by repeat visitors. These repeat visitors came on average between three and four times in the past decade and spent £1,240 in the UK in total, compared to an average European holiday repeat visitor spending £1,626 in the same time frame.

Journey purpose trend (visits 000s)



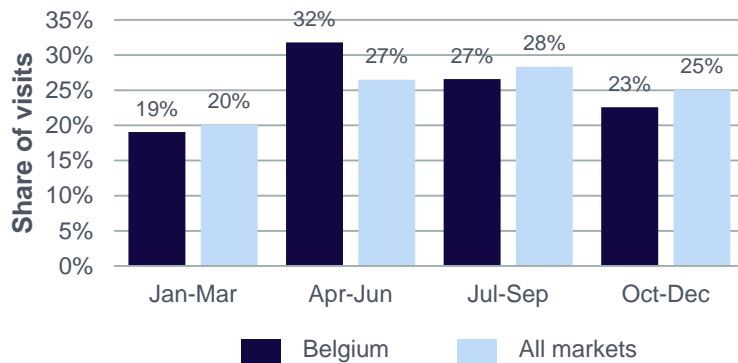
- Holidays continue to lead journey purposes in terms of volume. 40% of spending came courtesy of holiday visitors and 28% from business visits in 2016.
- Miscellaneous visits have seen the strongest growth out of all journey purposes looking at the 2012-2016 period (16%), followed by business visits (14%), but still fall short of pre-financial crisis records. At the same time visits to friends and/or relatives grew by 12% and set a new record in 2015 with 249,000 visits, almost matched in 2016.
- 95% of those coming to the UK for business visits (excl. expats) had been to the UK before as had 92% of those coming to visit friends or relatives in the UK.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015



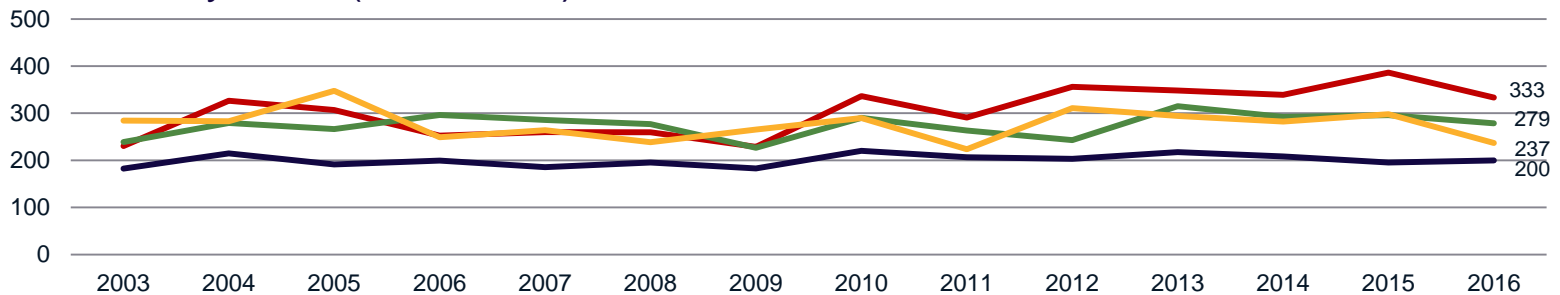
1.1 Key statistics: seasonality

Seasonality 2016



- In 2016, 32% of Belgian visits to the UK were made in the second quarter, followed by 27% in the summer. Almost one in four visits from Belgium were made in the last quarter and almost one in five happened between January and March.
- The second quarter has long led Belgian visits by volume. The number of visits in the summer months was fairly stable over the last few years. The October to December period was almost as popular but saw a decline in 2016.

Seasonality trend (visits 000s)



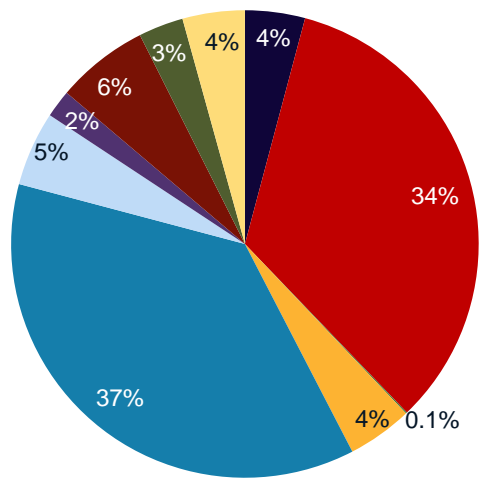
Source: International Passenger Survey by ONS

— Jan - Mar — Apr - Jun — Jul - Sep — Oct - Dec



1.1 Key statistics: length of stay and accommodation

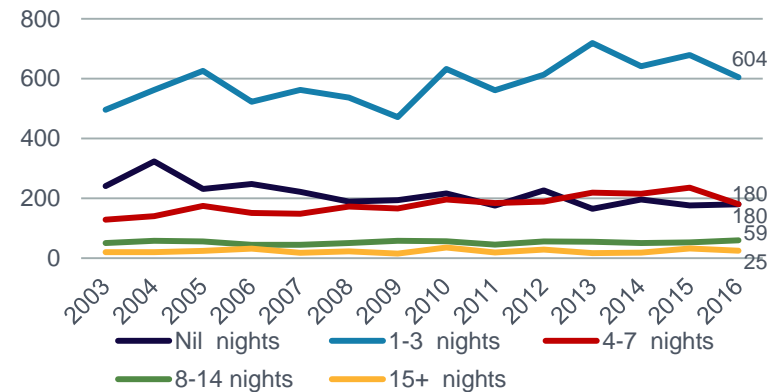
Accommodation stayed in, 2016
(nights, % share)



- Bed & Breakfast
- Free guest with relatives or friends
- Holiday village/Centre
- Hostel/university/school
- Hotel/guest house
- Other
- Own home
- Paying guest family or friend's house
- Camping/caravan
- Rented house/flat

Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



- Belgian travellers tend to favour shorter trips when travelling to the UK. Short trips of one to three nights lead Belgian visits by volume by far. Trips without an overnight stay and those which lasted between four and seven nights were equally as numerous in 2016.
- Two forms of accommodation dominate the picture with 37% of Belgian visitor nights spent at a 'hotel/guest house' and 34% spent staying for free with relatives or friends in 2016. All other types of accommodation accounted for a share of 6% or less of Belgian nights spent in the UK in the same year.



1.1 Key statistics: regional spread

Visits to the UK in (2014-2016 average)

Region	Nights stayed (000)	Visits (000)
Total	3,620	1,115
Scotland (SC)	292	42
Wales (WA)*	109	26
Northern Ireland (NI)*	8	2
London (LDN)	1,538	491
North East (NE)*	34	12
North West (NW)	182	52
Yorkshire (YO)	96	25
West Midlands (WM)	113	34
East Midlands (EM)*	105	23
East of England (EoE)	178	54
South West (SW)	319	62
South East (SE)	640	189
Nil nights (Nil)	N/A	184

Source: International Passenger Survey by ONS, *based on small sample





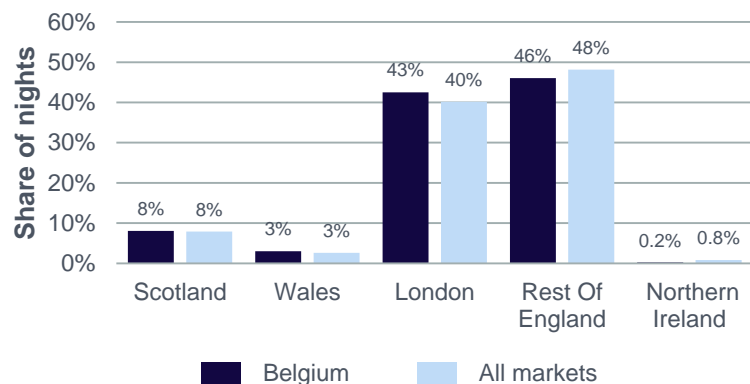
1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited

Town	Visits (000s, 2014-2016 average)
London	491
Manchester	24
Edinburgh	23
Oxford*	16
Canterbury*	15

- London is the leading destination for a trip to Britain, accounting for 43% of visitor nights, but South East, South West and Scotland are also popular based on the average nights spent in the UK in 2014-2016.
- Visitors from Belgium have a below average propensity to visit rural and coastal areas of Britain.
- A slightly above average proportion of visits from Belgium were bought as part of a package or an all-inclusive tour, in most cases for holiday visits (please note ONS definition of package holiday on page 16).

Regional spread (2014-2016)

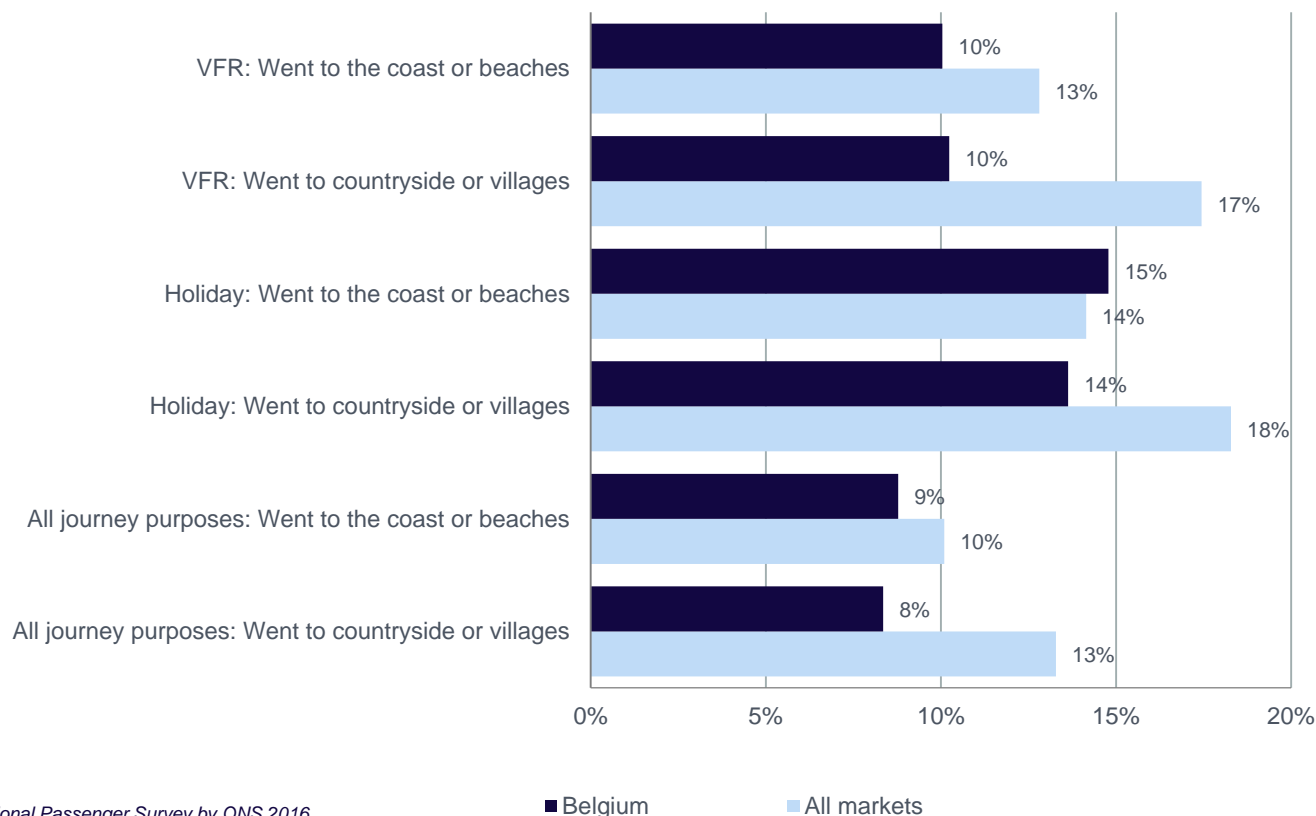


Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors
 *indicative due to small base



1.1 Key statistics: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

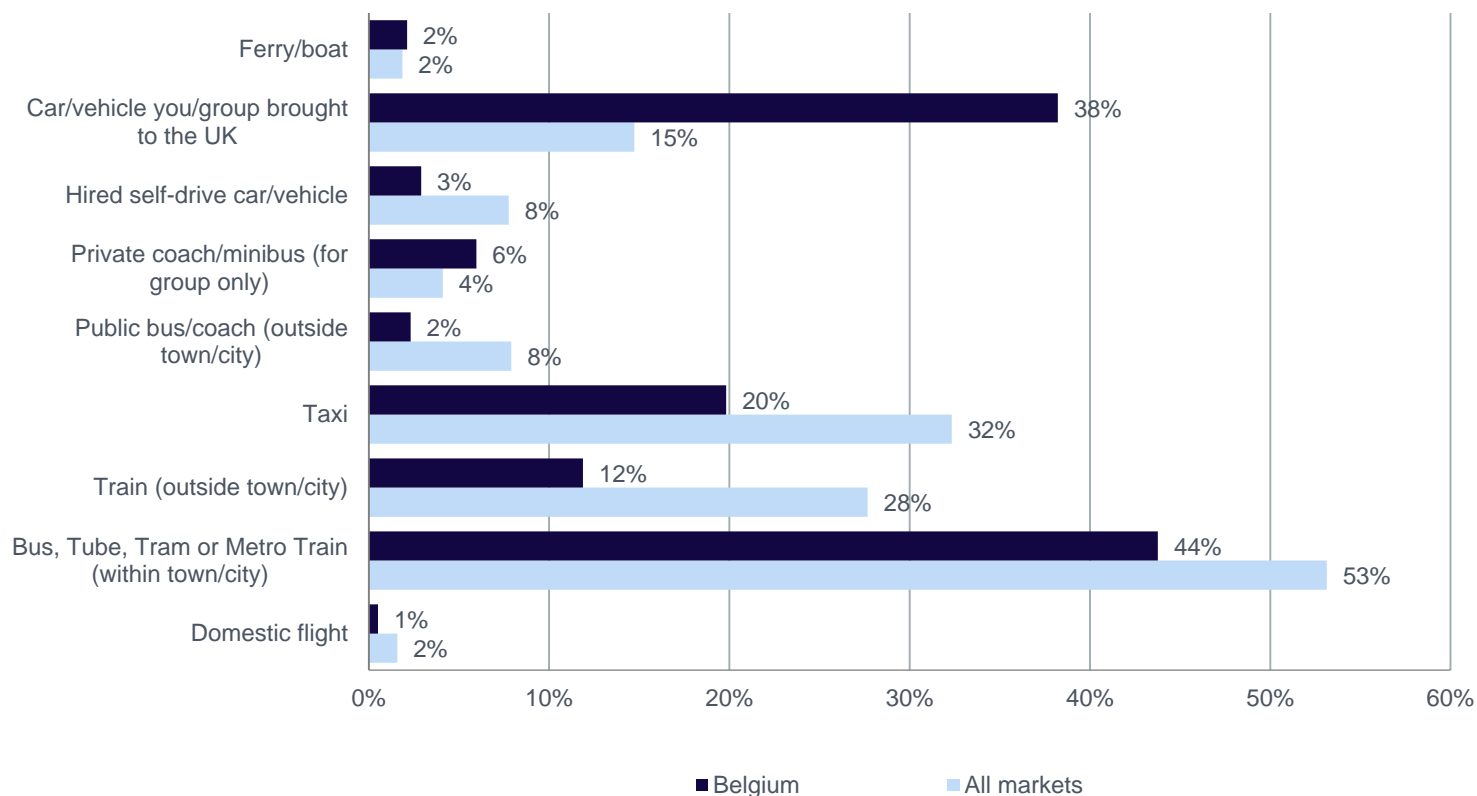


Source: International Passenger Survey by ONS 2016



1.1 Key statistics: use of internal modes of transport

Propensity to use internal modes of transport

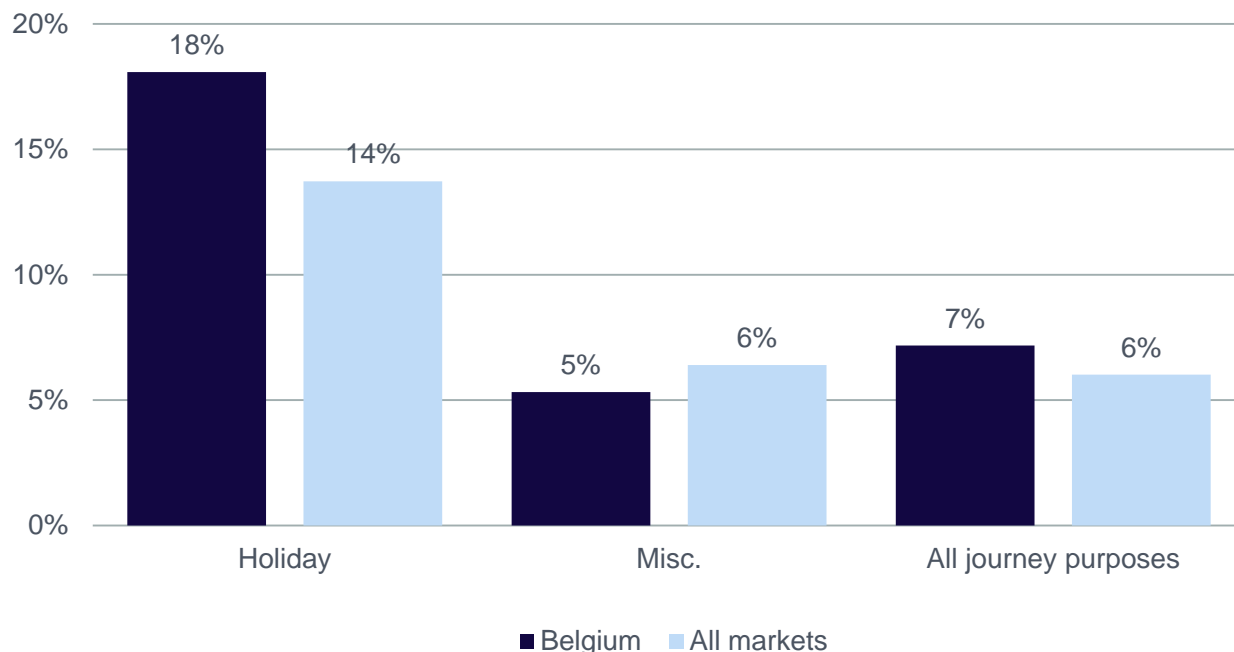


Source: International Passenger Survey by ONS, 2013



1.1 Key statistics: purchase of package tours

Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.

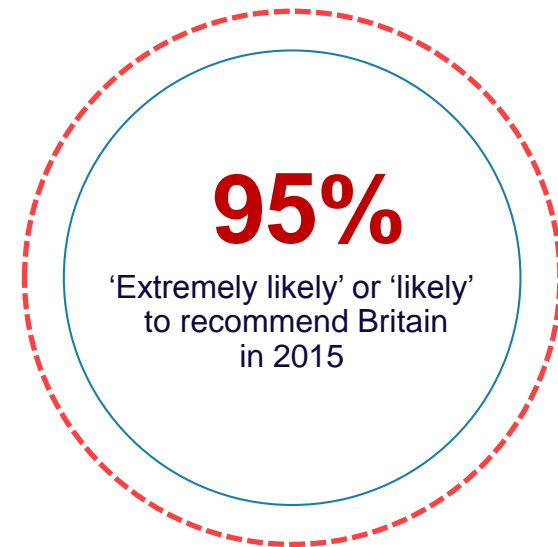
Source: International Passenger Survey by ONS



1.2 Visitor demographics

Visitor characteristics

- There are nearly four times more male than female business visitors but leisure visitors have a more even gender distribution.
- Four-in-five Belgian holiday visitors are making a repeat visit to Britain (excl. UK nationals).
- Most visits from Belgian residents to the UK were made by Belgian nationals (76%), 9% by British nationals and 15% nationals of another country.
- More visitors come from Brussels than from any other part of Belgium.
- 95% of visitors from Belgium are 'likely' or 'extremely likely' to recommend Britain for a holiday or short-break.

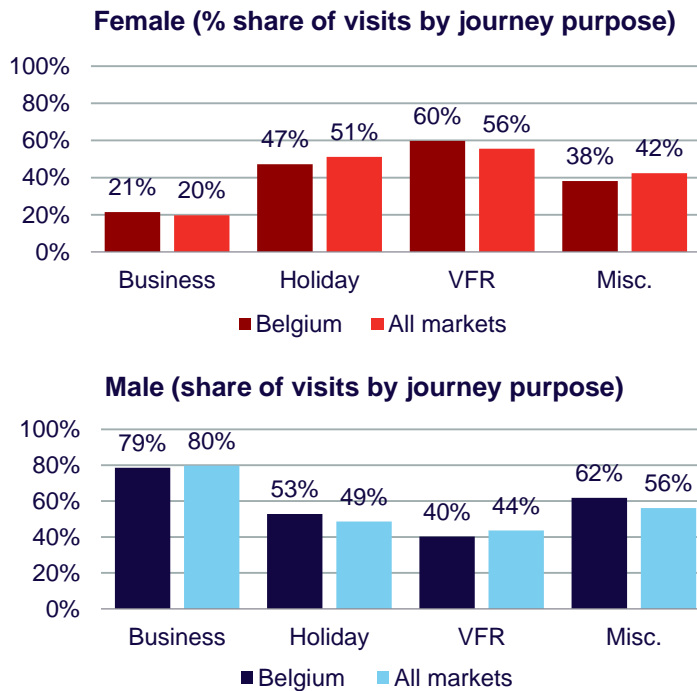


Source: International Passenger Survey by ONS



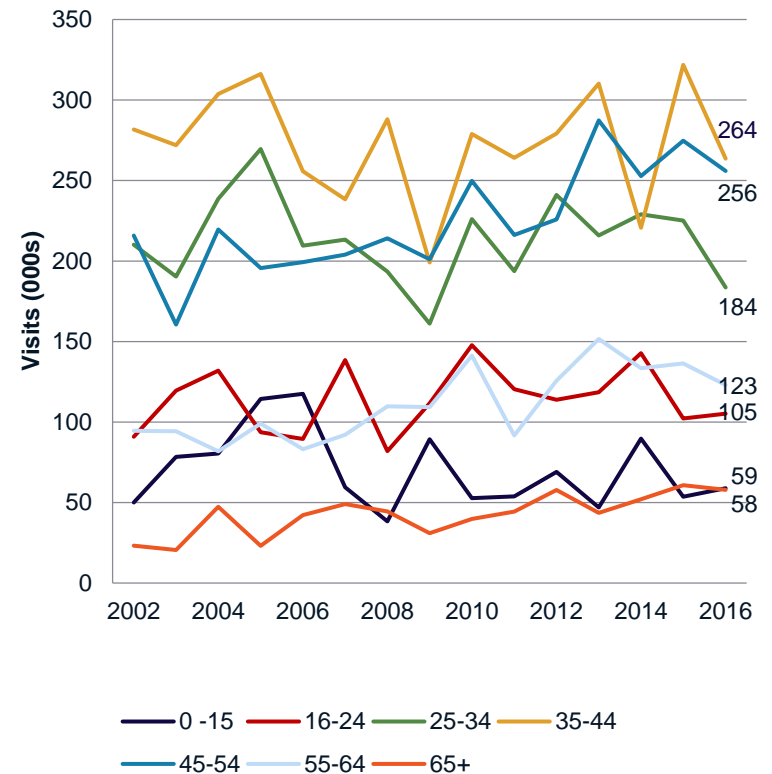
1.2 Visitor demographics: gender and age groups

Visitor demographics:
gender ratio of visits from Belgium:
42% female, 58% male



Source: International Passenger Survey by ONS, 2016

Age group trend

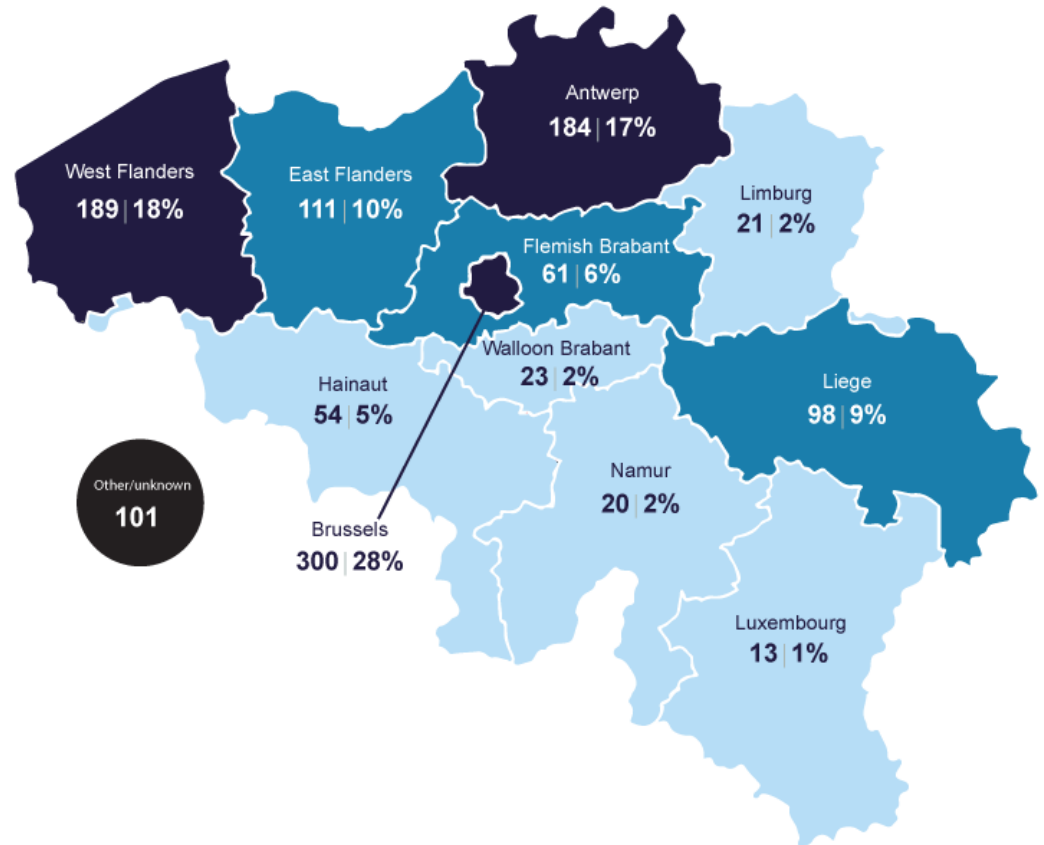




1.2 Visitor demographics: origin

Visits to the UK in (000)

- The majority of Belgian visitors to the UK reside in the North. More than one in four visits are made to the UK by residents of Brussels.
- Most of the Belgian population lives in the Northern parts of the country and the Southeast tends to be more thinly populated. The country is one of the most densely populated in the world.



Visits in 000s | % share of visits

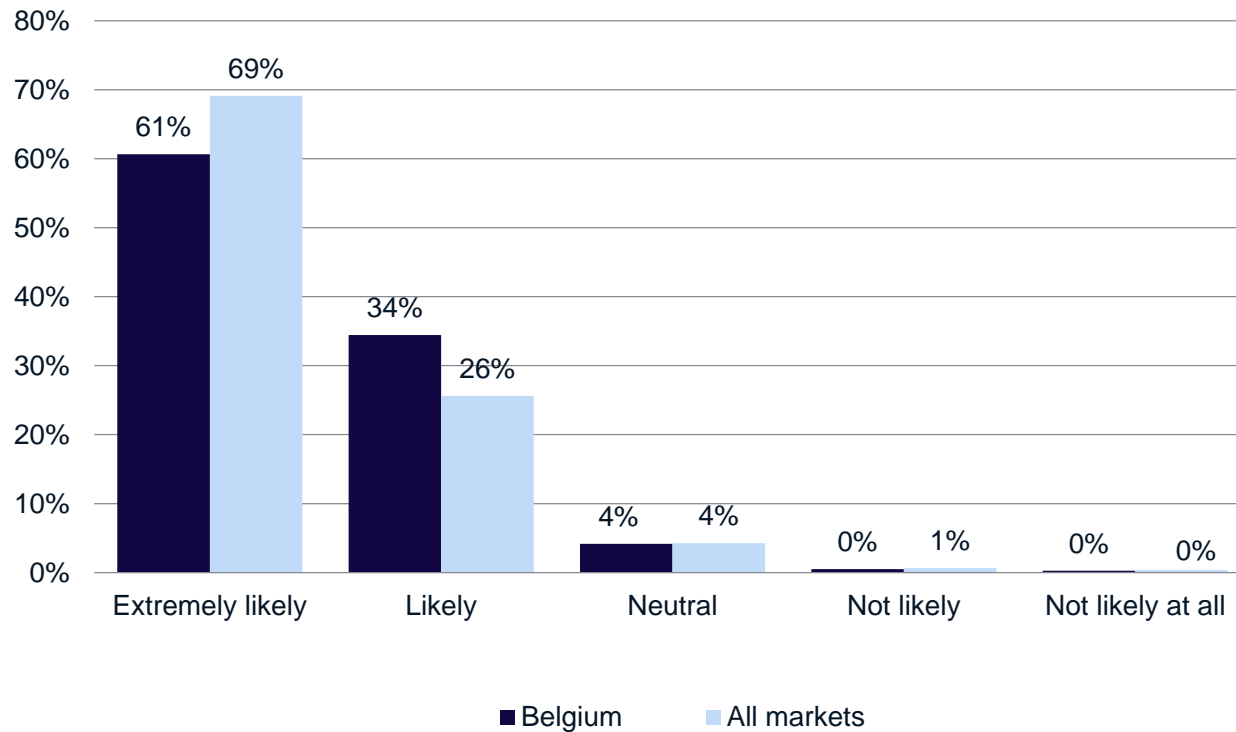


Source: International Passenger Survey by ONS 2015, CIA World Factbook 2017



1.2 Visitor demographics: likelihood to recommend Britain

Likelihood to recommend Britain



Source: International Passenger Survey by ONS 2015



1.3 Britain and competitors

Market size, share and growth potential

- France was the most visited destination by Belgian travellers in 2016.
- Forecasts suggest that the number of Belgian outbound overnight trips shows good growth potential: 32% of growth is forecasted in the period from 2016-2025. The number of Belgian overnight trips to Britain is forecasted by a strong 76% in the same timeframe.
- The UK was the 6th most visited destination on such trips in 2016, behind France, Spain, the Netherlands, Germany and Italy.
- 54% of tourist nights spent in Belgium in 2016 were booked by domestic travellers.

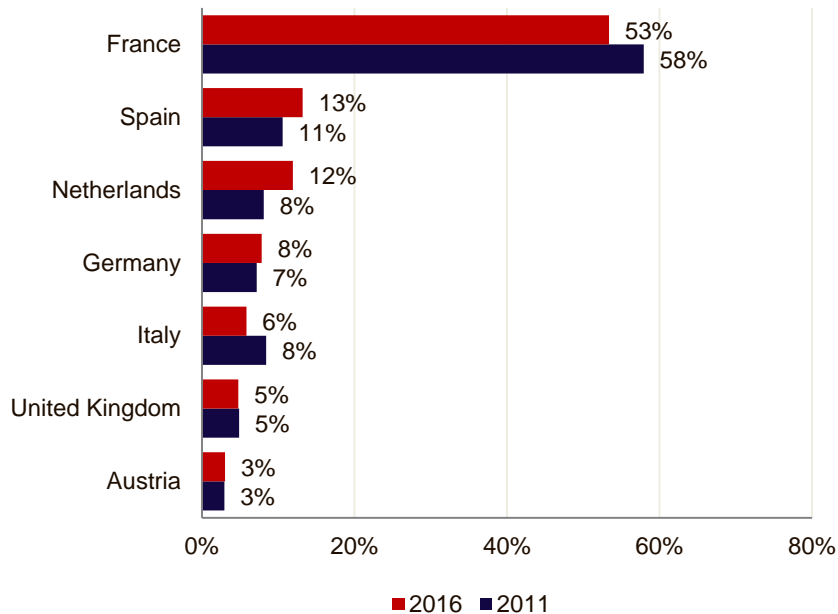


Source: Oxford Economics (outbound overnight trips), [Statbel June 2017](#)



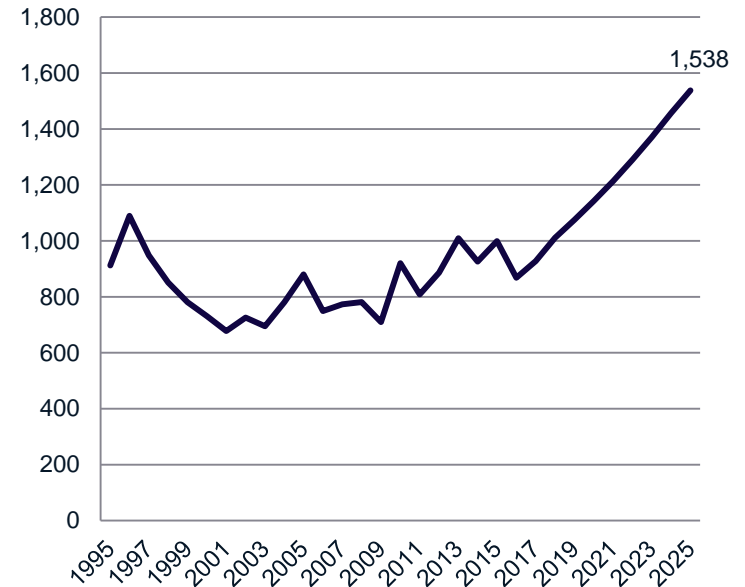
1.3 Britain and competitors

Britain's market share of Belgian visits among competitor set



Source: Oxford Economics (outbound overnight visits)

Historic and potential visits to Britain (000s)



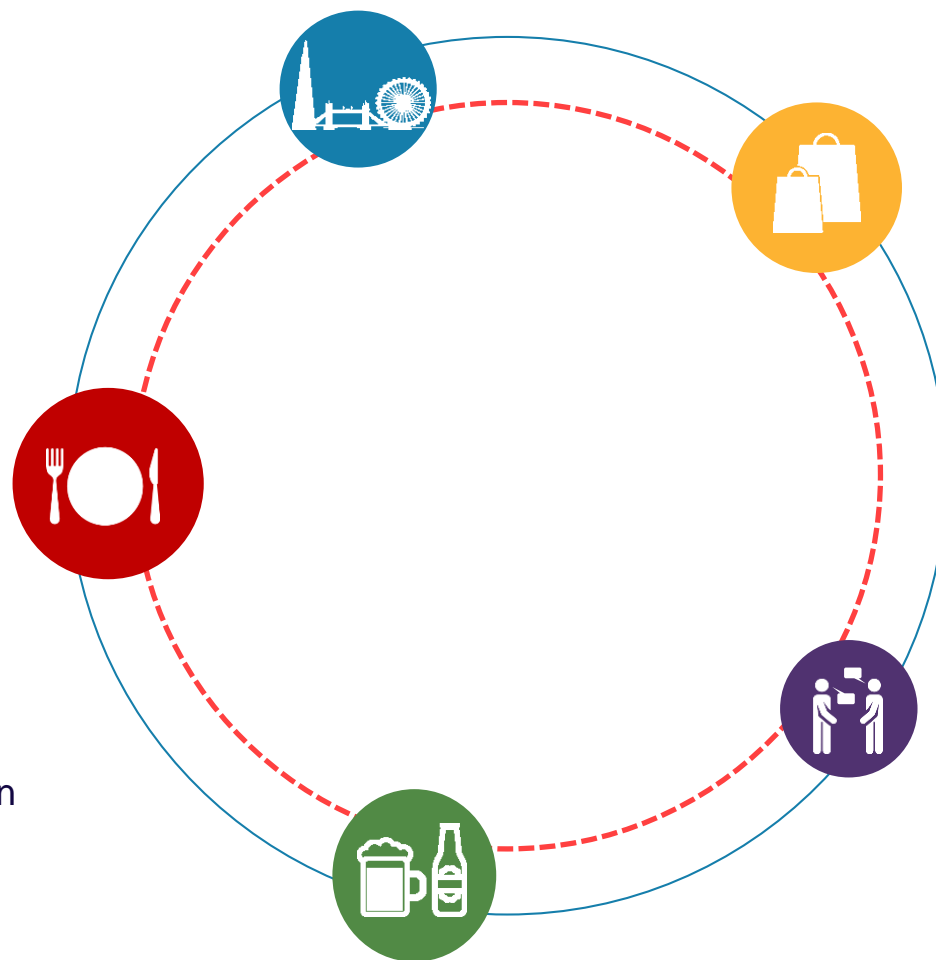


1.4 Inbound activities

Inbound Britain activities

- Dining in a restaurant is the number one activity, featuring in nearly three in five Belgian visits. Almost two in five Belgian visits include going to a pub.
- Shopping is the second-most popular activity, featuring in more than half of Belgian visits.
- A third of Belgian visits involve sightseeing of famous monuments/ buildings, often involving a visit to a museum, art gallery, castle and/or historic house.
- More than one in five like to socialise with locals.
- About one in five visits feature some time in parks and gardens.
- Belgians have a higher than average propensity to purchase food and drink.

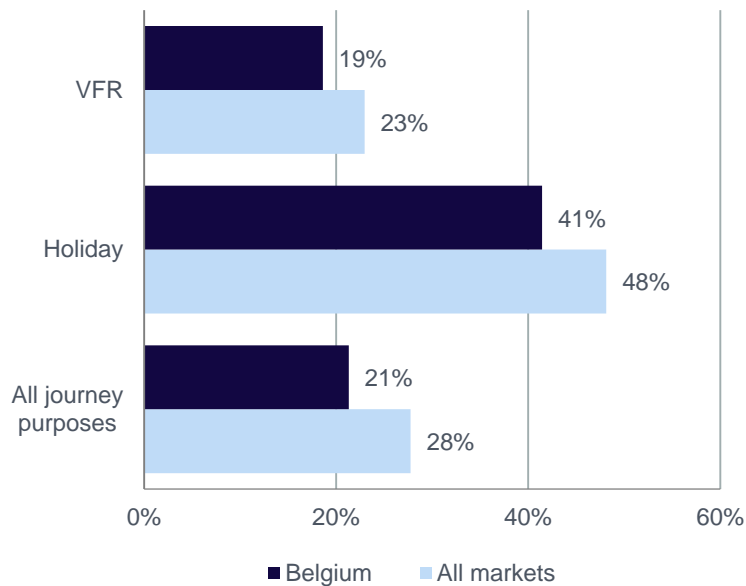
Source: International Passenger Survey by ONS



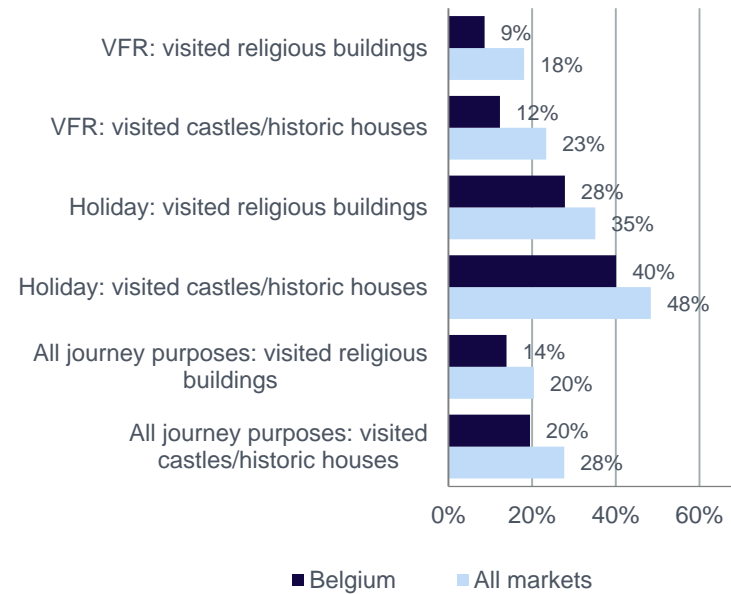


1.4 Inbound activities

Propensity to visit museums and galleries



Propensity to visit built heritage sites

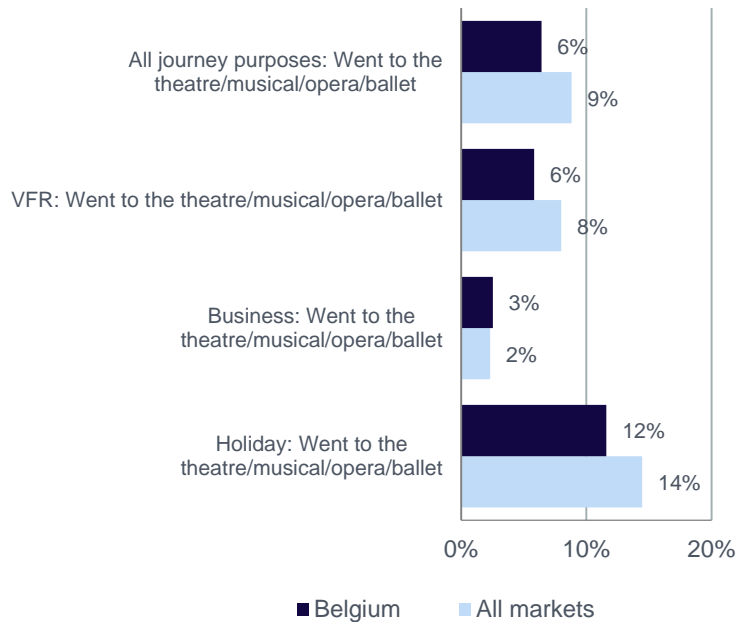


Source: International Passenger Survey by ONS 2016, may be based on small base

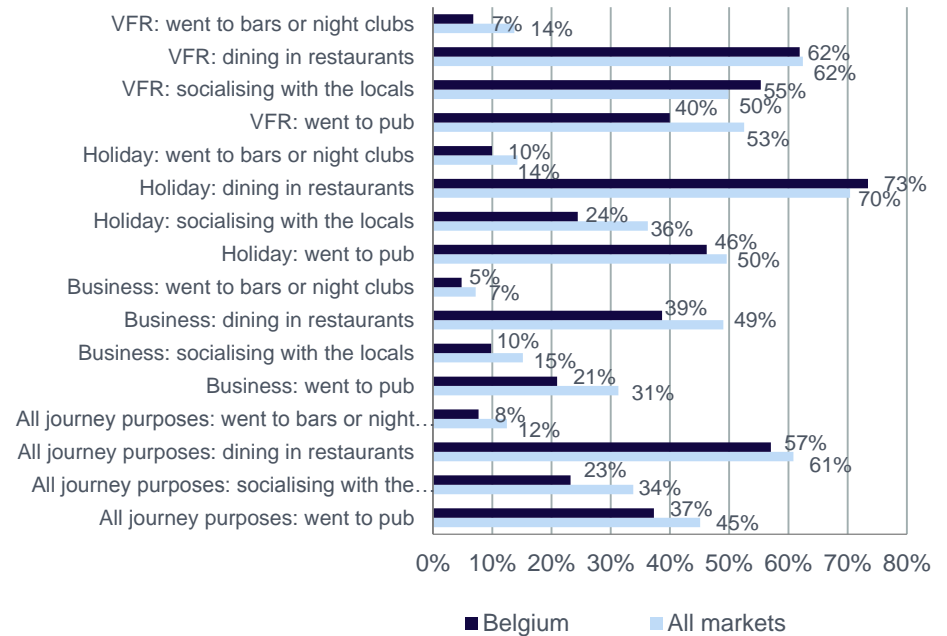


1.4 Inbound activities

Propensity to attend the performing arts



Propensity to go to restaurants, pubs, night clubs and socialise with locals

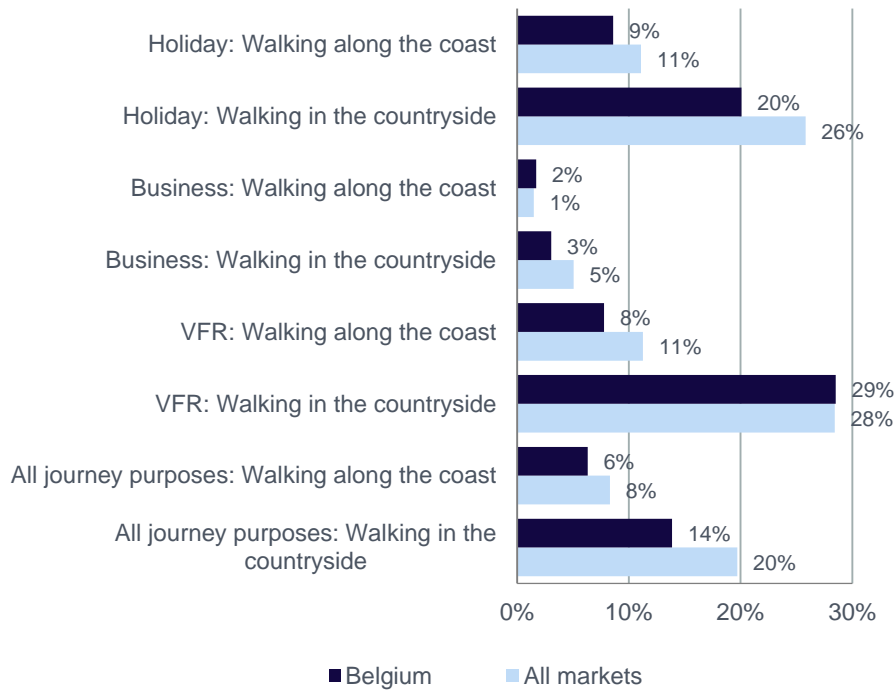


Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2016

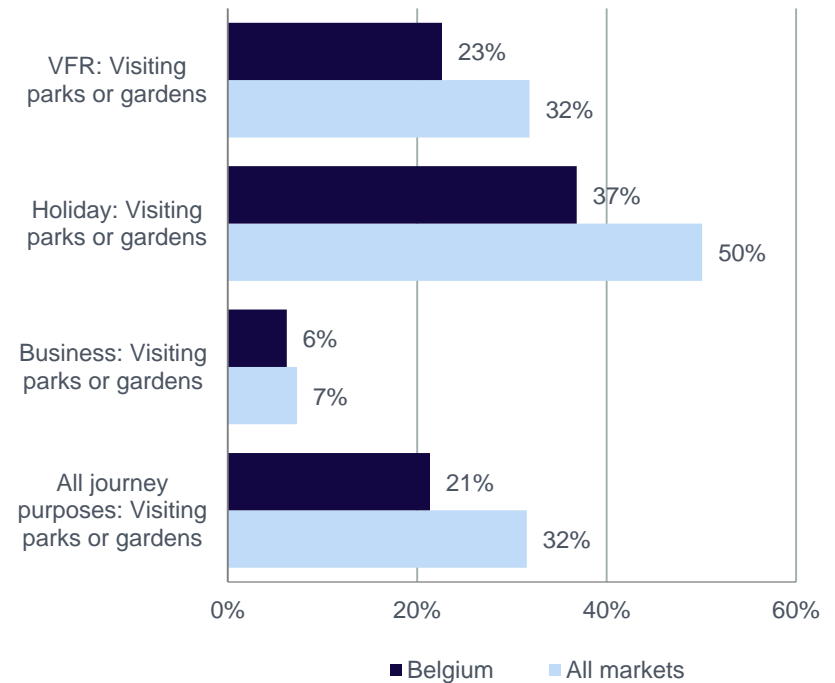


1.4 Inbound activities

Propensity to go for a walk



Propensity to visit a park or garden

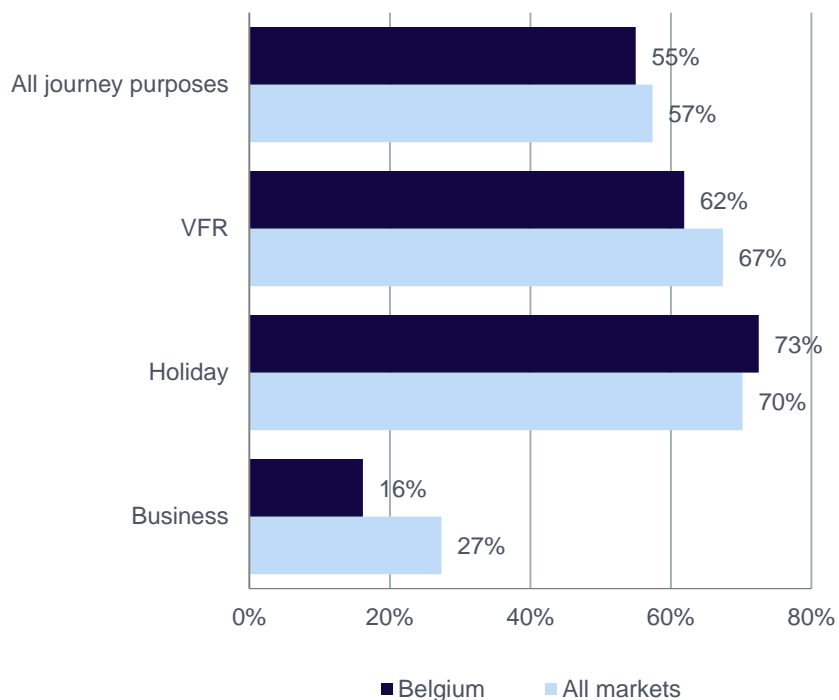


Source: International Passenger Survey by ONS 2007, 2010 and 2016

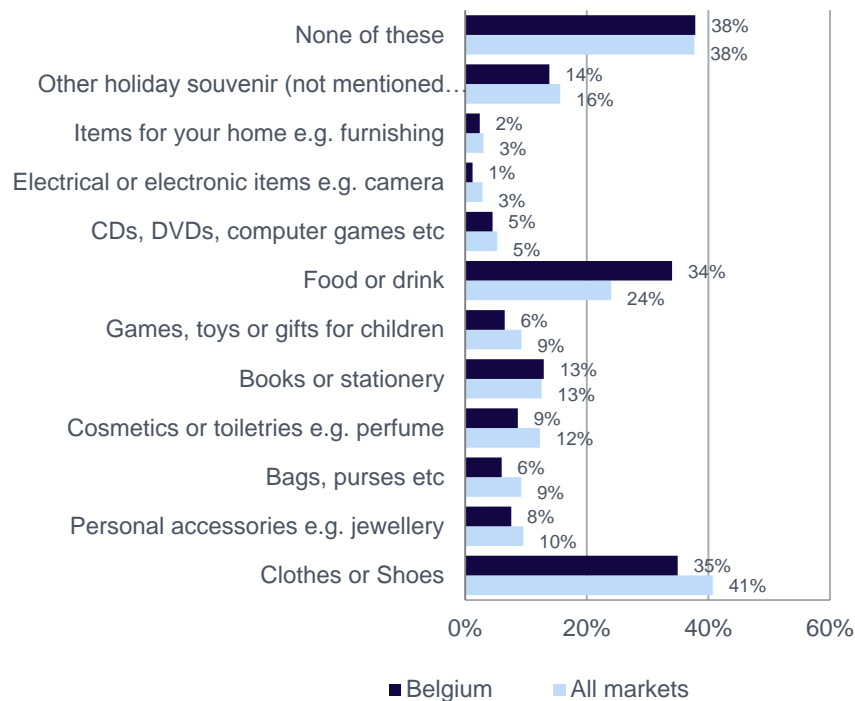


1.4 Inbound activities

Propensity to go to shopping



Propensity to purchase selected items

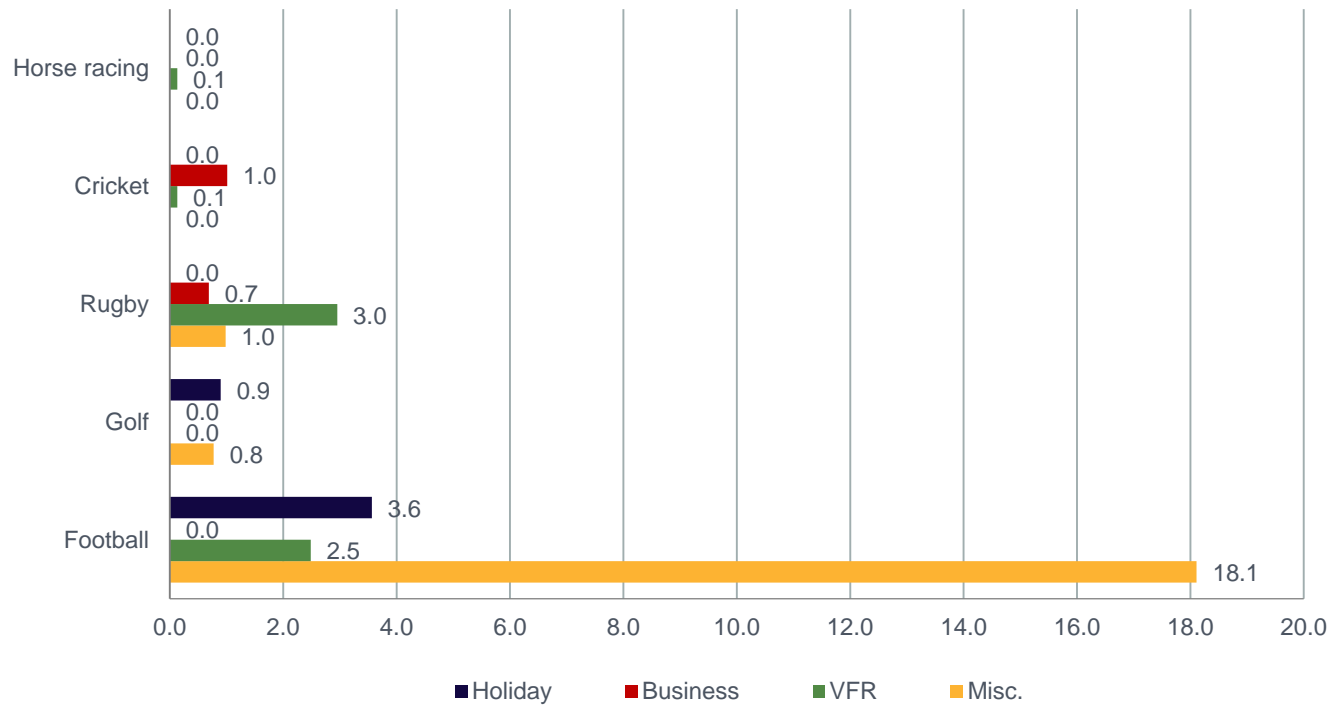


Source: International Passenger Survey by ONS 2011 and 2013



1.4 Inbound activities

Number who went to watch live sports during trip (000s)



Source: International Passenger Survey by ONS 2011, base may be small



Chapter 2: Understanding the market





2. Understanding the market

Chapter summary

- Belgium has a population of more than 11 million.
- About four in five Belgians go on at least one holiday per year.
- More than one in four Belgians book their holidays between three and five months in advance of their trip, about one in five six to eight months prior to the trip.
- More than half of Belgians book their holidays online.
- Recommendations from family, friends and/or colleagues as well as online sources are the biggest influences on travel decision-making for Belgians.
- Belgians like to prepare once their trip is booked, gathering information about sights and what can be visited in the holiday destination.
- 54% of tourist nights spent in Belgium in 2016 were booked by domestic travellers.



Source: [FISA-Grayling February 2017](#), [Flash Eurobarometer 432 by EC 2016](#), [Statbel June 2017](#)



2.1 Structural drivers

Demographics & society

- Population of more than 11 million.
- Belgium is a kingdom with federal parliamentary democracy under a constitutional monarchy.
- There are 3 regions: Brussels-Capital Region, Flemish Region (Flanders) and the Walloon Region (Wallonia).
- Most of the Belgian population lives in the Northern parts of the country and the Southeast tends to be more thinly populated. The country is considered to have one of the densest levels of population in the world.
- There are three official languages in Belgium: Dutch (60%), French (40%) and German (less than 1%).*
- Belgian employees are entitled to a minimum of 20 days of annual leave by law. An average of 27 days of annual leave is most common.



Source: Oxford Economics, CIA World Factbook 2017, *percentages in brackets indicate the proportion of the population which speaks the respective language, Vacature 2018



2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2017 estimate
Total population	11,375,000
Median age	41
Average annual rate of population change in 2017 - 2022	0.3%

Economic indicators

Indicator (annual growth rate unless stated otherwise)	2017	2018	2019
Real GDP	1.7%	1.7%	1.5%
Consumer spending	1.1%	1.9%	1.6%
Unemployment rate	7.2%	6.5%	6.4%
Wage index	1.7%	3.0%	3.2%
Consumer prices	2.1%	1.7%	1.8%

Source: Oxford Economics, CIA World Factbook 2017



2.1 Structural drivers: general market overview

General market conditions

- Belgium was Britain's 9th largest source market in terms of visits and 19th most valuable for visitor spending in 2016.
- The Belgian economy is growing with real GDP rising by 1.7% in 2017, the highest since 2011, and forecasted to grow by 1.9% in 2018. The labour market has been improving and consumer and business confidence bodes well as of late 2017. (Oxford Economics)
- The country has a population of more than 11 million which is forecasted to grow. The Belgian median age is 41.
- Most people in Belgium have a high standard of education and living. Real GDP per capita in purchasing power parity terms of just under US\$41,500 which is higher than the Eurozone average.

Key demographic and economic data

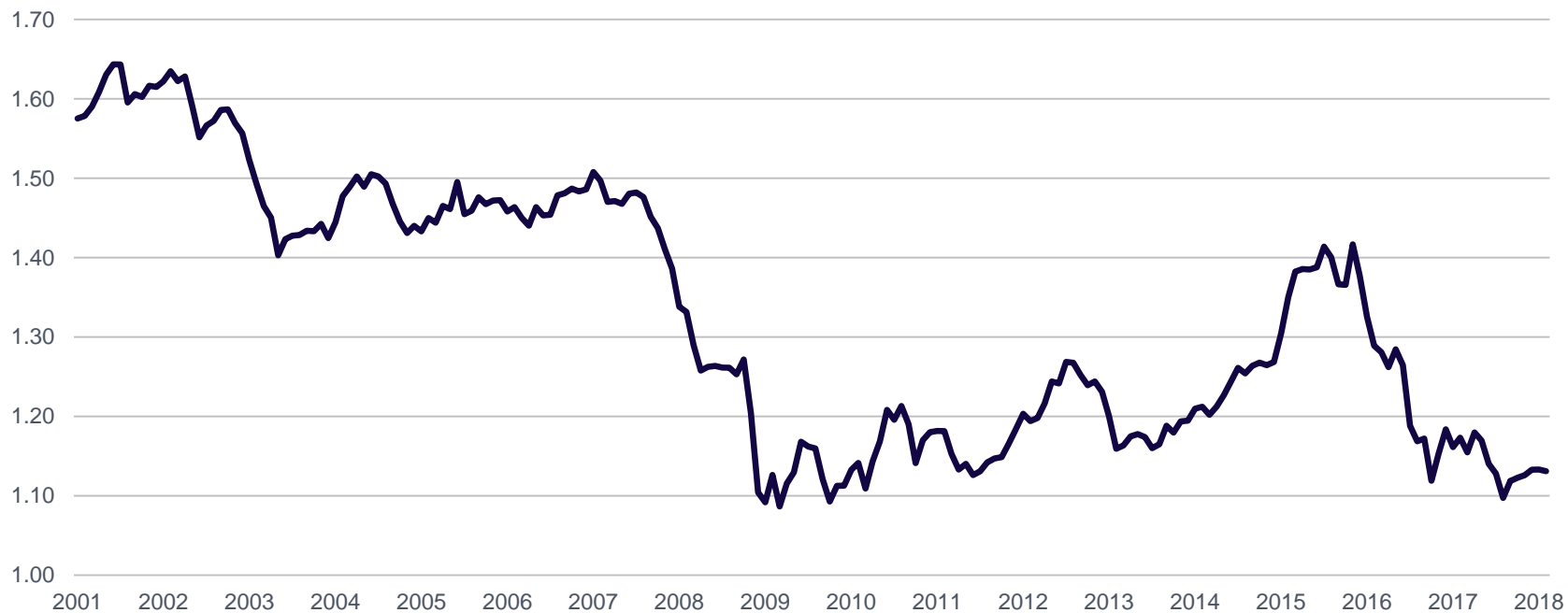
Measure (2017 data)	Belgium	Eurozone
Population (m)	11.4	337.7
GDP per capita PPP (US\$)	41,455	38,994
Annual average GDP growth over past decade (%)	0.9	0.6
Annual average GDP growth in 2017 (%)	1.7	2.5

Source: Oxford Economics, CIA World Factbook 2018



2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in EUR)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source. Bank of England



2.2 Consumer trends

- 82% of Belgians aged 18 or over like to go on holidays based on a survey by Incidence conducted in December 2016.
- Many have a preference for spending their summer holidays by the sea (50%), followed by holidays in the mountains (17%) and city breaks (15%).
- Belgians like to prepare once their trip is booked, gathering information about sights and what can be visited in the holiday destination.
- The number of Belgians flying to their holiday destinations continues to increase over the longer term, although almost three in five still take their car to go on holidays. (ABTO/WES research).
- 54% of tourist nights spent in Belgium in 2016 were booked by domestic travellers.
- The availability of WiFi during their holiday is essential for more than half of Belgians' accommodation choice, followed by air conditioning and a swimming pool.
- Belgians have an above-average propensity to consider aspects of sustainability and environmentally friendly measures when making their destination choice.

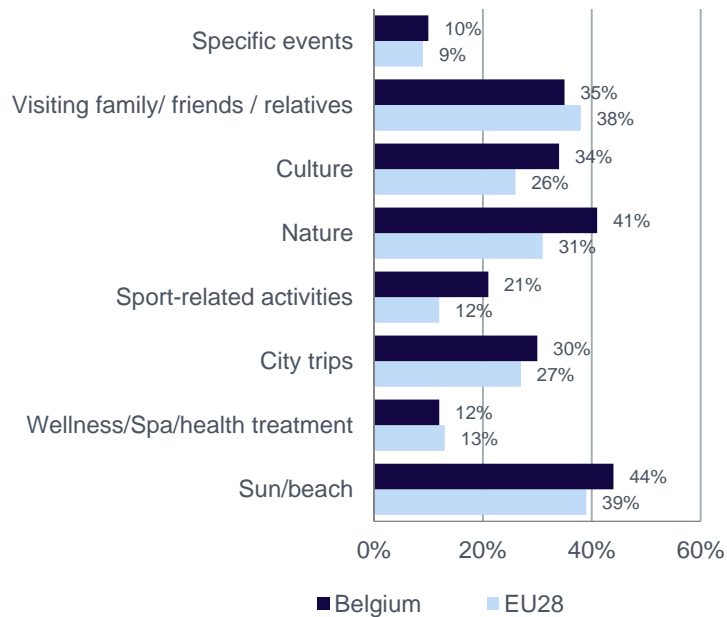
50%
of Belgians like to
spend their summer
holidays by the sea.

Sources: [Statbel June 2017](#), [FISA-Grayling February 2017](#).



2.2 Consumer trends: reasons for holidays

Main reasons for going on holiday



- Amongst the main reasons for going on a holiday for Belgian travellers are: sun/beach, nature, visiting family/friends/relatives and culture followed by city trips. About one in five stated sport-related activities, which is well above average.

Source: Flash Eurobarometer 432 by EC 2016: What were your main reasons for going on holiday in 2015? Firstly? And then? and Which of the following would make you go back to the same place for a holiday? Firstly? And then?

Reasons to return to the same destination for a holiday

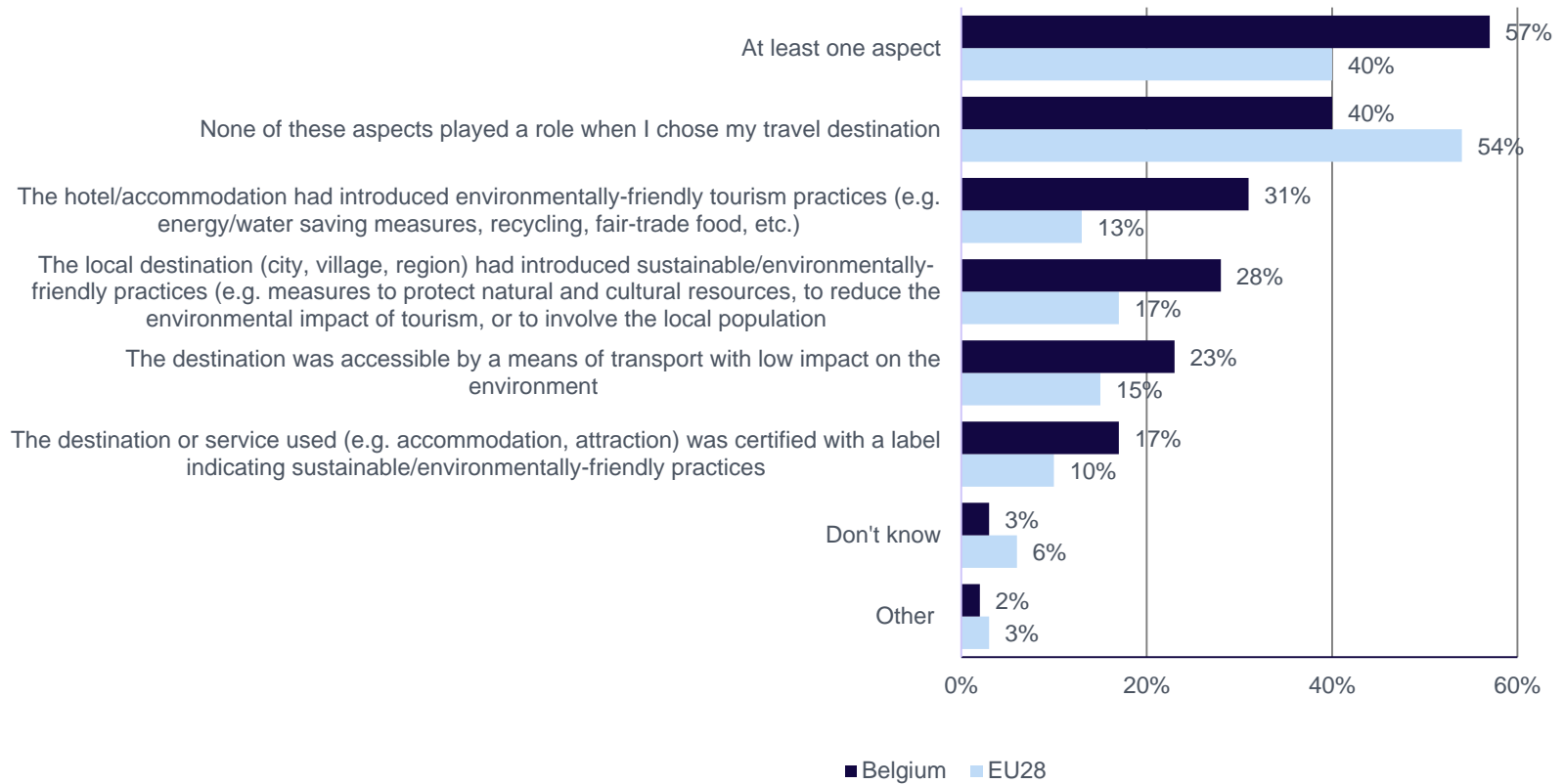


- When asked about reasons which would make them return to a destination, 51% of Belgians value natural features and just over two in five the quality of accommodation whilst about one third stated cultural and historical attractions and the general level of prices. Almost one in four mentioned the welcome for tourists.



2.2 Consumer trends: sustainability/environment

Role of sustainable/environmentally-friendly aspects when choosing travel destinations



Source: Flash Eurobarometer 432 by EC 2016: Were any of the following aspects relevant for you when you chose the destination(s) to visit during your main holiday in 2015? (max. 3 answers)



2.3 Booking and planning

- More than half of Belgians book their holidays online. Despite the large proportion of online bookings, two in five Belgians worry about potential risks when they make their booking on the Internet.
- Whilst the majority of Belgians do not use the services of a travel agency, those who do were most likely to do so for the following reasons: if their destination of choice is less common and/or exotic and if they were booking a package tour. Almost half of those Belgians who consult travel agents value professional advice, more than two in five go there for the quality of the service and a similar proportion look for information about destinations for holiday ideas (often an online booking follows).
- More than one in four Belgians book their holidays between three and five months in advance and about one in five six to eight months prior to the trip.



More than half
of Belgians book their
holidays online

Source: Flash Eurobarometer 432 by EC 2016: Did you book your holiday in 2015 by any of the following methods? (multiple answers possible), *FISA-Grayling February 2017*.



2.3 Booking and planning: booking channels

Methods used to book a holiday



- More than half of Belgian respondents are comfortable using online commercial services to make their holiday bookings, slightly more than the European average (50%). Almost two in five use services such as tour operator or airline websites.
- 17% made a booking over the counter with a travel agent and 16% booked their holidays over the phone, broadly in line with the European average.
- More than one fourth made their booking through someone they know, a higher proportion than the European average (16%).
- More than one in four Belgians (28%) book their holidays between three and five months in advance of their trip.

Source: Flash Eurobarometer 432 by EC 2016: Did you book your holiday in 2015 by any of the following methods? (multiple answers possible), FISA-Grayling February 2017.



2.4 Reaching the consumer

- Recommendations from friends, colleagues or relatives are the most influential source for travel decision-making, with more than half of Belgians saying these are important when making their travel plans, closely followed by websites in general. Almost two in five state that personal experience is important.
- Less than one in ten use paid guidebooks or magazines, broadly in line with the European average.
- The use of smartphones to research information and look for holiday inspiration is becoming increasingly important.
- The importance of social media as a source of information remains rather limited for the Belgians. For holidays longer than 4 nights, only 6% of Belgians use social media as the most important source of information. For tour operator holidays this is 7% and for long trips 14%.
- Belgians devote more time to the so-called traditional media activities than to those online. On average, Belgians spend almost 6 hours daily on the combined use of TV, radio, written press and video games vs. a little over 2 hours spent online.



**Friends, family
& colleagues**

#1 Influence for the
destination choice
of Belgians

Source: Flash Eurobarometer 432 by EC 2016 , [FISA-Grayling February 2017](#), [Wes & ABTO Feb 2017](#), [Digimedia 2016](#)



2.4 Reaching the consumer: broadcast media, radio, newspapers and magazines



Broadcast media

- Belgians watch an average of 2.5 hours of TV a day. Younger generations of Belgians increasingly stream TV programmes, with TV channels offering their own online services in response to popular streaming services like Netflix. Many use other devices while watching TV e.g. use their mobile etc.
- Popular French-spoken TV channels include (by market share in 2016): RTL-TV1, La Une, Nickelodeon, AB3, National Geographic FR, Cartoon Network, Club RTL, Plug RTL and La Deux.
- Popular Flemish-spoken TV channels include (by market share in 2016): Eén, Ketnet, VTM, VIER, NickJr., VIJF, Canvas and Vitaya.



Radio

- Popular French-spoken radio stations include: Radio Contact, Bel RTL, VivaCité, Radio Nostalgie, Classic 21, NRJ and La Première.
- Popular Flemish-spoken radio stations include: Radio 2, Studio Brussel, Q-Music, MNM, JOE fm, Radio 1 and Nostalgie.



Newspapers/Magazines

- There are considerable differences in the developments of the French and Flemish spoken newspaper markets in Belgium. Whilst circulation of French titles has declined over the last decades to almost 330,500, Flemish titles declined less sharply and maintain a large circulation in 2016 with just under 900,000. As a result there has been consolidation in the newspaper landscape with now 15 newspaper titles in Belgium.
- Popular Flemish titles: Het Laaste Nieuws (274,832), Het Nieuwsblad (238,804), De Standaard (100,053), De Morgen (54,750), De Tijd (41,877), regionals: Het Belang van Limburg (93,414) and Gazet van Antwerpen (87,834).
- Popular French titles: Le Soir (65,659), Sudpresse (90,220), L'Avenir (81,095), La Dernière Heure (42,015), La Libre Belgique (35,524), L'Echo (15,964).
- Free daily in both language areas, Metro (110,594 in Flanders, 98,582 in Wallonia).
- Many newspapers now also have digital titles and/or online presence. The same is true for the Belgian magazine landscape.

Source: Belgium Media Landscape by European Journalism Centre 2017, [GfK 2016](#), [Statista 2016](#), [Digimedia 2016](#)



2.4 Reaching the consumer: online media and social media



Online media

- Belgians devote more time to so-called traditional media activities than to those online. On average, Belgians spend almost 6 hours daily on the combined use of TV, radio, written press and video games vs. a little over 2 hours spent online, less in many other markets.
- In Belgium 61% of 16- to 64-year-olds now have a smartphone, and 55% connect to the internet with their mobile device. The use of the mobile device has surpassed that of the PC/laptop as the main source for Internet consumption in most other countries but in Belgium 91% still use them to connect. About half of Belgians own a tablet.
- Most traditional media now have digital outlets.



Social media

- The average use of social networks in 2016 was nearly 1.5 hours. In the Belgian market there is a trend for multinetworking with many users having more than one social media account.

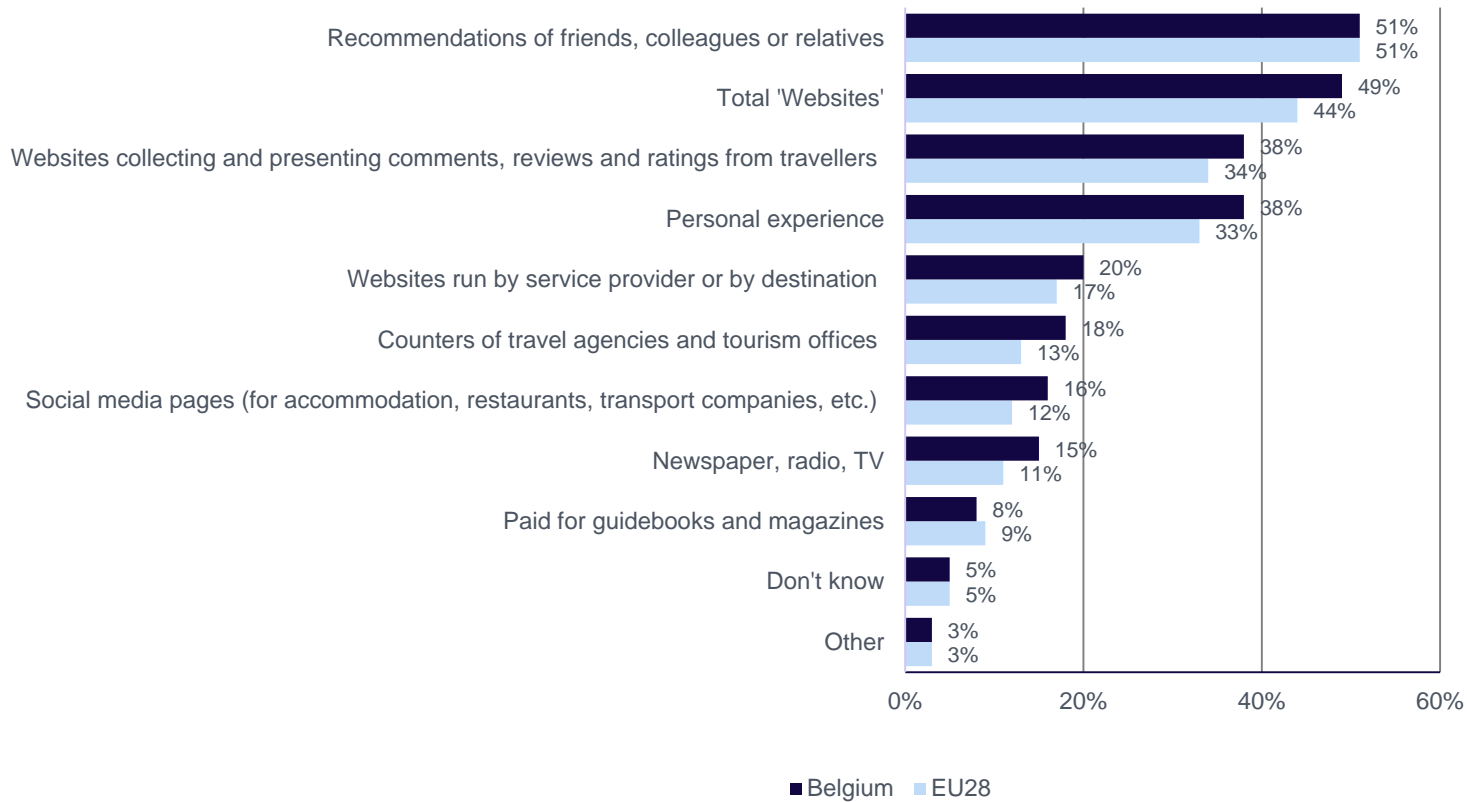
- Belgians are keen social media users across all age groups (80% of Internet users 16-74 years of age, the third-highest proportion in the EU and higher than the EU average of 63%). Among younger people between 16 and 24, almost all (97%) use social media and in the older age group with Internet users aged between 65 and 74 years, more than average engage with social media (56% in Belgium compared to below 50% in almost all EU member states).
- Facebook was by far the most used social media platform in Belgium in 2017 (35%), followed by Youtube (15%), Google+, Twitter, LinkedIn and Instagram.
- Fewer Belgians actually post about their lives rather than consume information shared by others. On Facebook, about a third post photos and status updates and roughly half read articles and follow the news.
- The importance of social media as a source of information remains rather limited for the Belgians. For holidays longer than four nights, only 6% of Belgians use social media as the most important source of information. For tour operator holidays this is 7% and for long trips 14%.

Source: : [Eurostat 2017](#), [Statista 2018](#), [Digimedia 2016](#), [Wes & ABTO Feb 2017](#)



2.4 Reaching the consumer: influences

Influences on decision-making



Source: Flash Eurobarometer 432 by EC 2016: Which of the following information sources do you think are most important when you make a decision about your travel plans? (max. 3 answers per respondent)



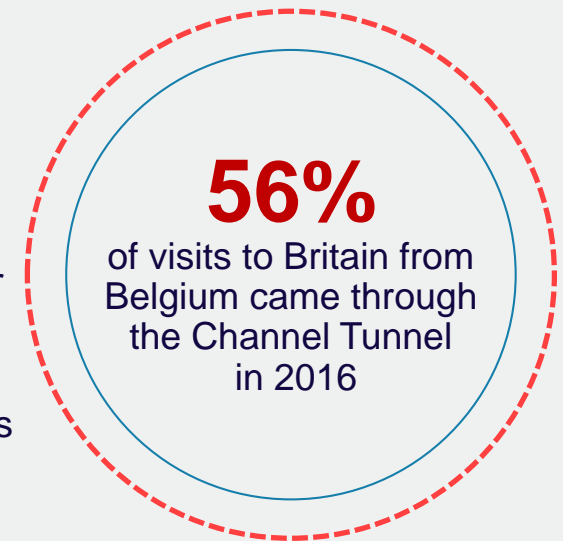
Chapter 3: Access and travel trade





3. Access and travel trade

- Access to Britain is easy. 56% of Belgian visits were made via the Channel Tunnel (which links Britain and France), followed by 26% by ferry and 17% by plane.
- Annual airline seat capacity has grown slightly in recent years, however, the Eurostar remains the preferred means of transport for many Belgians when visiting the UK. Brussels Airlines and British Airways provided about $\frac{3}{4}$ of annual flight seat capacity in 2017.
- The travel industry in Belgium is made up of tour operators, carriers and ticket consolidators, business travel, MICE and travel agents.
- There are hardly any Britain-specialists. Britain product can mainly be found in:
 1. City breaks by major tour operators (London dominates, Edinburgh, excursions across nations and regions of the UK)
 2. Coach touring round the country by major tour operators
 3. Short-term language courses by student operators and educational operators



Source: Apex Rdc 2017: non-stop flights only, International Passenger Survey by ONS



3.1 Access: key facts

- 56% of Belgian visits were made via the Channel Tunnel (which links Britain and France), followed by 26% by ferry and 17% by plane.
- A journey on the Eurostar which links Brussels to London non-stop takes roughly 2 hours and data from the IPS shows that it is the most frequently-chosen option for visiting the UK. The trains run frequently with roughly 10 trains per day.
- Flight seat capacity started growing slightly again in recent years after a sharp decline had taken place since its peak a decade ago. In addition to the financial crisis which is likely to have caused softening demand at that time, journey times on the Eurostar had been reduced which could also have contributed to passengers frequently choosing the Tunnel.
- Belgian visitors departing Britain by air currently pay £13 in Air Passenger Duty.

◀ More than half of Belgian visits are made through the Channel Tunnel.

Access to Britain

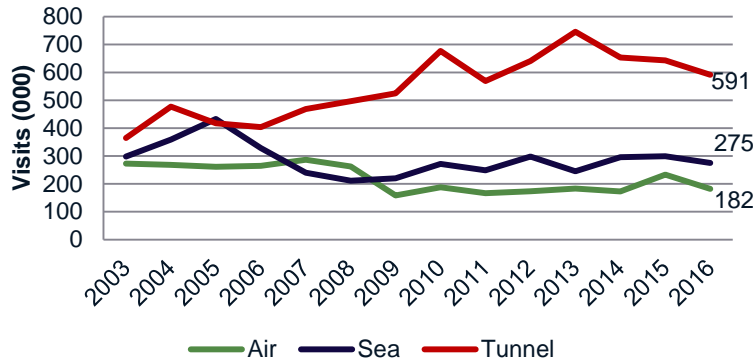
Measure	2017
Weekly aircraft departures	185
Weekly aircraft seat capacity	21,122
Airports with direct routes in Belgium	3
Airports with direct routes in Britain	11
Eurostar trains per day from Brussels	10
Weekly ferry crossings	7

Source: International Passenger Survey by ONS, Apex RdC 2017: non-stop flights only, Eurostar "Our history"

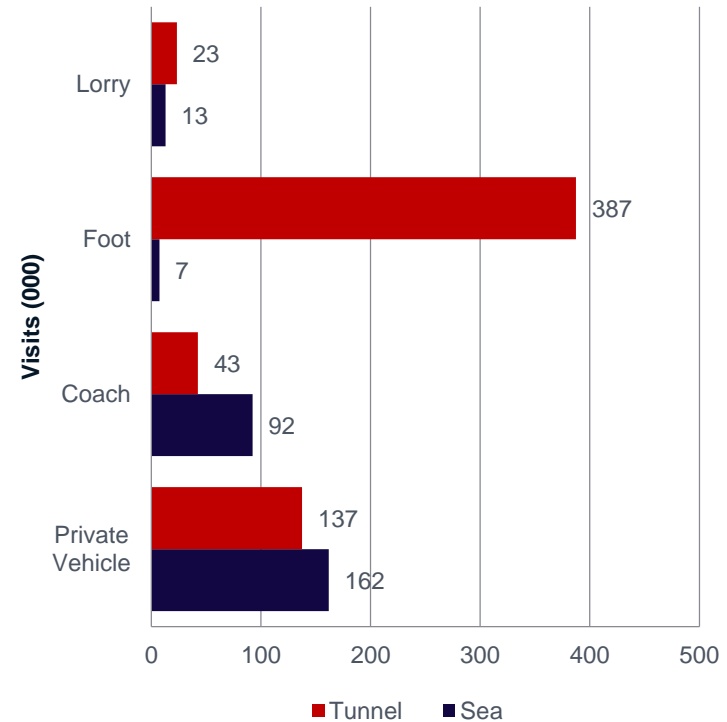


3.1 Access: mode of transport

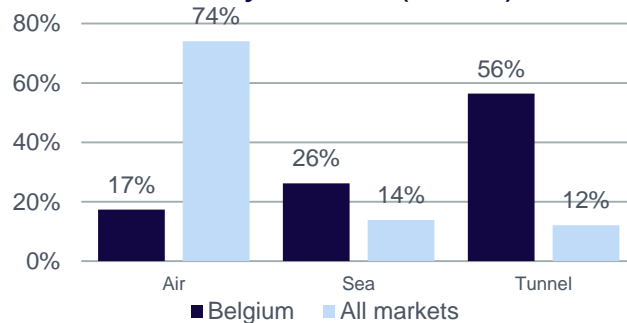
Visits by mode of transport



Sea and tunnel travel (000s) in 2016



Annual share by mode (2016)

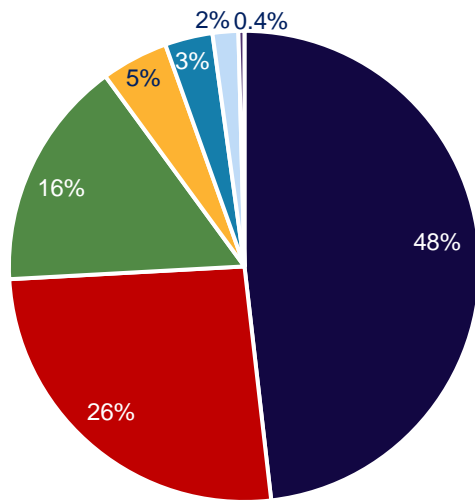


Source: International Passenger Survey by ONS



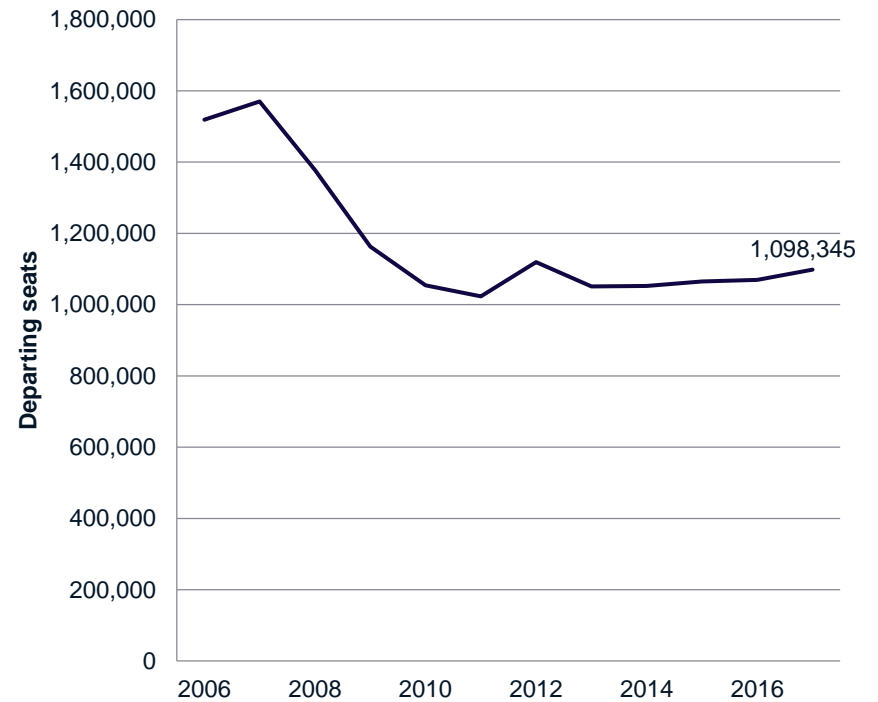
3.1 Access: capacity

Airline seat capacity by carrier (2017)



- Brussels Airlines
- British Airways
- Ryanair
- bmi Regional
- Cityjet
- RwandAir
- Others

Origin airport annual seat capacity

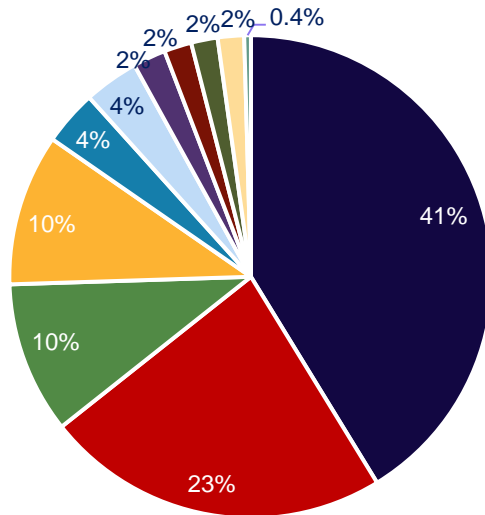


Source: Apex Rdc 2017: non-stop flights only



3.1 Access: capacity

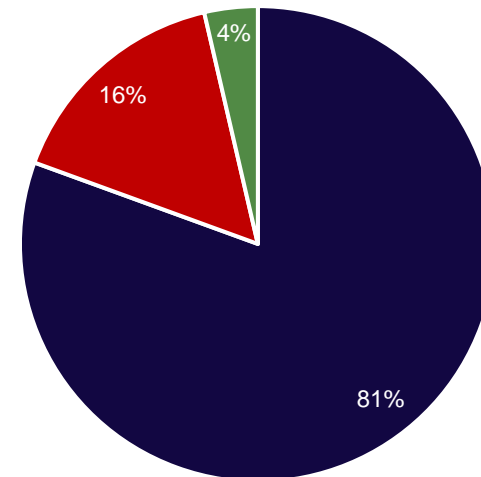
Destination airport annual seat capacity



- London - Heathrow
- Manchester International
- Edinburgh
- Birmingham International
- Bristol
- London City
- East Midlands
- Newcastle
- Glasgow International
- London - Gatwick
- Belfast City

Source: Apex Rdc 2017: non-stop flights only

Origin airport annual seat capacity



- Brussels - National
- Brussels South Charleroi
- Antwerp-Brussels North



3.2 Travel trade: general overview

- The travel trade in Belgium has mainly consolidated around two key players: TUI and Thomas Cook. There are some smaller niche operators and associations such as walking groups, cultural clubs, schools, universities and evening colleges will organise holidays for their members. The key centres for the travel trade are Brussels and Flanders although trade is spread across the country.
- Tour operators (TOs) mostly sell their products through travel agencies, which continue to be key in Belgian distribution. Increasingly, tour operators also sell directly to the consumer through the Internet (although for holidays to Britain the number of direct sales tends not to be significant). Coach operators usually sell their coach tours through their own or independent travel agencies.
- The number of group operators is limited in Belgium but they are – especially the school group operators - very important to Britain and represent a high volume of visits. These operators tend to split into the youth, seniors and special interest segments. Belgium has a lot of mid-size travel agents who book directly with UK suppliers for bespoke luxury travel packages.
- Planning cycle: less relevant to online tour operators, traditional operators with print brochures often need programmes/rates for winter programmes by March/April and those for the summer by August/September.

Belgians value building business relationships. Personal contact is crucial.



3.2 Travel trade: Belgian holidays

Public holidays

National public holidays in 2018

Date	National Holiday
1 January	New Year's Day
2 April	Easter Monday
1 May	Labour Day
10 May	Ascension Day
21 May	Pentecost Monday
21 July	Independence Day
15 August	Assumption Day
1 November	All Saints Day
11 November	Armistice Day
25 December	Christmas Day

Belgian school holidays in 2018*

Date	Local/School Holiday
25 December 2017 – 7 January 2018	Christmas Holidays
12 February – 18 February	Krokusvakantie
2 April – 15 April	Easter Holidays
1 July – 31 August	Summer Holidays
29 October – 4 November	Autumn Holidays
24 December 2018 – 6 January 2019	Christmas Holidays

*Please note that dates may vary by school.



3.2 Travel trade: practical information

General practical information:

- Business hours are usually 09:00 – 17:00 as standard.
- Dress code: Business dress tends to vary by business from formal to smart casual. Belgians like to dress up in formal wear for business events and galas.
- Business Meeting Etiquette: Appointments are mandatory and should be made well in advance. Reconfirm your appointment about a few days before your visit. Be punctual as it is important to Belgians. Please call your contact if you get delayed and offer an explanation.
- Shake hands with everyone present when you arrive and again on departure. Be careful of using first names as they are usually reserved for family and close friends. Please address your contacts using the last name unless invited to greet them by their first name. If your meeting is in French, please make sure you address people as “vous” not “tu” on the first appointment. You should wait until invited before using someone’s first name and “tu”.
- Follow up quickly on any action points.
- Communication tends to be formal and you should expect written communication, both to back up decisions and to maintain a record of decisions and discussions. Following the established protocol is critical to building and maintaining business relationships. Once a firm business relationship has been established it is appropriate to relax rules and to become more informal.
- Business often is hierarchical and decision-making is held at the top of the company. Final decisions are translated into comprehensive action steps.



3.2 Travel trade: sales calls

Sales calls

Belgian tour operators tend to be spread across Belgium but due to the relatively small size of the country it is possible to do more than one visit in a day. VisitBritain recommends that you take the following steps:

- Most Belgian trade professionals have good command of English.
- It is still appreciated if you can provide information in your contact's language, wherever possible. Make sure to provide French speakers with French information and Flemish agents with information in their language. Please avoid producing literature or documents in French when talking to a Flemish agent or vice versa unless explicitly invited to do so. Belgians tend to like printed material so please provide maps and printed brochures where possible.
- Online tour operators are not bound to a planning cycle. Those tour operators who produce print brochures are best contacted before the summer holidays (March/April) for winter programmes and programmes/ rates should be available by August/September for summer programmes.
- It is best to avoid scheduling in meetings in July and August, the week before Easter or during the week between Christmas and New Year.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Belgian trade attend the VisitBritain's ExploreGB workshop & VisitScotland Expo. Please contact [VisitBritain London](#) for details of those attending. Some operators also visit World Travel Market and ITB.

Source: [Gov.uk](#)



3.2 Travel trade: practical information

Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your Belgian business partner out for a meal – either to build up a relationship or to thank for business given in the past. Food and drink tend to be very important for Belgians. They appreciate a good lunch or dinner. Here are some practical tips to help you plan this:

- Credit cards are usually accepted in all restaurants (only double check with the small ones) VISA and Mastercard are most accepted but in some restaurants American Express cards are not accepted.
- Arrive on time and if possible, before the invite, as punctuality indicates reliability.
- If you order water you will be asked if you want mineral still or sparkling; the ‘carafe d’eau’ (tap water in the French-spoken part) is another common option, but maybe not for a business invitation.
- Bread is always served and you can order refills any time.
- Some Belgians drink wine with their meals, although not always at lunch time.
- Service charge and VAT are included in the price, therefore tipping is limited. Tips are only given if you are happy with the service provided and rarely more than €5.



3.3 Caring for the consumer: French and Dutch language tips

Language basics

English	French	Dutch/Flemish
Please	S'il vous plaît	Alstublieft
Thank you	Merci	Dank u wel
Yes	Oui	Ja
No	Non	Nee
Sorry! (apology)	Désolé(e) ! / Veuillez m'excuser !	Sorry!
Excuse me!	Excusez-moi ! / Pardon !	Neem me niet kwalijk
Sorry, I do not speak French/Dutch.	Excusez-moi mais je ne parle pas français.	Sorry, ik spreek geen Nederlands.



3.3 Caring for the Consumer

Caring for the Consumer:

- Belgians tend to highly appreciate good value for money, often choosing accommodation in the three to four star range. Many Belgians are keen to hear about luxury upgrades (e.g. to 5* accommodation) if available on booking.
- Food is one of the great passions of many Belgians. Their cooking tends to be highly refined and involves careful preparation, attention to detail, and the use of fresh ingredients. It varies by region and is heavily influenced by locally grown produce.
- Many Belgians tend to have lower than average perceptions of British food and drink but are often interested in trying local food and drink whilst visiting. Enjoying a full English breakfast often is on the list of things to do in the destination.
- The Belgian people have a tendency to socialise in their homes and restaurants – their home is usually reserved to family and friends. An invitation to join them for a meal is a sincere compliment. Meals are sociable occasions and they take their time to enjoy them.
- Breakfast in Belgium often is a light meal of bread, cereal, yogurt, and coffee or hot chocolate. Lunch consists of a salad or a sandwich usually followed by a piece of fruit or yogurt.
- Dinner is generally the main meal of the day: three courses are common with the first course, a main dish followed by dessert (often fruit). Bread is expected to be served throughout the meal. “Bon appétit” for French speakers or “Smakelijk” for the Flemish is wished to everyone around the table at the start of the meal.
- Many Belgians are comfortable with making payments by credit card.

Source: International Passenger Survey by ONS, Belgian trade feedback



3.3 Caring for the consumer: French and Dutch language tips

Language tips for arrival and departure

English	French	Dutch/Flemish
Hello	Bonjour !	Hallo
My name is...	Je m'appelle...	Mijn naam is
Welcome to Britain	Bienvenue en Grande-Bretagne !	Welkom in Groot-Brittannië!
Pleased to meet you!	Enchanté(e)	Aangenaam kennis te maken
How are you?	Comment allez-vous ?	Hoe maakt u het?
Enjoy your visit!	Bon séjour ! / Bonne visite !	Geniet van uw verblijf
Goodbye	Au revoir !	Tot ziens
Did you enjoy your visit?	Avez-vous apprécié votre séjour ?	Heeft u van uw verblijf genoten?
Have a safe journey home!	Bon retour ! / Bon voyage !	Goede reis
Hope to see you again soon!	A bientôt !	Hopelijk tot ziens!



3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities) or trade website (trade.visitbritain.com) or contact the B2B events team (Email: events@visitbritain.org) or campaign partnerships team (Email: partnerships@visitbritain.org) or trade support team (Email: tradesupport@visitbritain.org)



3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specific-research
- 2017 Inbound Tourism Forecast visitbritain.org/forecast
- Britain's competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about the Belgian or other inbound markets browse our markets & segments pages or (visitbritain.org/markets-segments) our inbound research & insights or (visitbritain.org/inbound-research-insights) contact us directly (Email: research@visitbritain.org)



Market and Trade Profile: Belgium

March 2018