RESIDENT STUDY

- METHODOLOGY
- RESULTS
- CONCLUSIONS
METHODOLOGY

- **Resident survey** 5 Flemish cities: Antwerp, Ghent, Leuven, Mechelen, Bruges
- Respondents 18 year and older
- Field: 23/7–12/12 2019

- Research in **closed setting**, only by random invitation
- Online survey, by email or paper letter invitation
- **5,788 completes**, representative for gender, age, education and living area
- For Ghent, Leuven, Mechelen, Bruges in all boroughs, for Antwerp the residents within the ring road + Linkeroever

**VALUABLE RESPONSE**

- **ANTWERP** 1.276
- **GHENT** 1.373
- **LEUVEN** 1.046
- **BRUGES** 1.328
- **MECHELEN** 765

**TOTAL: 5.788 IN 2019 (5.354 IN 2017)**
RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
  • Support for tourism
  • Impact of tourism
  • Drivers of support for tourism
  • Future
  • Other

• CONCLUSIONS
Results

Summary key concepts

- **Support**
  - Positive Impact: 3.9
  - Negative Impact: 2.9
  - Livability: 2.5
  - Score: 3.9/5

- **Impact**
  - Positive Impact: 3.4
  - Negative Impact: 2.9
  - Livability: 2.5
  - Score: 3.4/5

- **Drivers**
  - Proudness: 3.9
  - Economic Benefits: 13% (YES)
  - Social Involvement: 3.2
  - Score: 3.9/5

- **Future**
  - Own Behaviour
  - Policy Choices
  - More/Less Tourists
RESULTS – Evolution 2017 - 2019

Key concepts (average score out of 5 – 2017 indicated with ‘’)

Significant differences with 2017 are indicated by a bar placed on the 2017 results. When there’s no bar present, the 2019 results don’t significantly differ from the 2017 results. When an ‘N’ is placed near the statement or city, this statement/ city wasn’t part of the study in 2017. Meaning, this was a newly added statement in 2019 (for a specific city).
RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
  • Support for tourism
  • Impact of tourism
  • Drivers of support for tourism
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  • Other

• CONCLUSIONS
RESULTS
Support for tourism

% ‘agreement’ with the statement …
– 2017 indicated with □
RESULTS
Support for tourism

“I support tourism and want to see it remain important in my city ...”
– 2017 indicated with 

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<td>6%</td>
<td>7%</td>
<td>4%</td>
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<td>18%</td>
<td>22%</td>
<td>19%</td>
<td>17%</td>
<td>19%</td>
<td>76%</td>
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<td>76%</td>
<td>71%</td>
<td>77%</td>
<td>79%</td>
<td>76%</td>
<td>75%</td>
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RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
  • Support for tourism
  • Impact of tourism
    • Livability
    • Perception positive impact
    • Perception negative impact
  • Drivers of support for tourism
  • Future
  • Other

• CONCLUSIONS
Livability

% ‘agreement’ with the statement ...

% ‘agreement’ – 2017 indicated with ☐

N*: no evolution possible
Livability

Tourists in my city are a nuisance

– 2017 indicated with 📈

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<tr>
<td>DON'T AGREE</td>
<td>60%</td>
<td>55%</td>
<td>40%</td>
<td>26%</td>
<td>15%</td>
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<tr>
<td>NEUTRAL</td>
<td>71%</td>
<td>60%</td>
<td>29%</td>
<td>29%</td>
<td>15%</td>
<td>40%</td>
</tr>
<tr>
<td>AGREE</td>
<td>78%</td>
<td>71%</td>
<td>19%</td>
<td>32%</td>
<td>16%</td>
<td>16%</td>
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</table>
RESULTS – 2019

Livability

What nuisance? – total

- More density, too many people: 18%
- Dangerous roads, because of traffic density: 13%
- Noise: 10%
- Litter: 10%
- Parking is a problem: 5%
- Respect of tourists: 5%
- Things get more expensive: 4%
- Inferior (shopping) supply: 2%
- Cars, busses, taxi’s in the inner city: 2%
- Too many events, too much for tourists, little for...: 1%
- Other: 2%
- No nuisance: 65%

- 2017 indicated with X
Livability

What nuisance? – part 1
– 2017 indicated with ☐

No nuisance
Density, too many people
Dangerous roads, because of traffic density
Noise
Litter
Parking is a problem
Respect of tourists

ANTWERP 2019  GHENT 2019  LEUVEN 2019  MECHELEN 2019  BRUGES 2019  TOTAL 2019

RESIDENTS ART CITIES
Livability

What nuisance? – part 2
– 2017 indicated with

- Things get more expensive
- Inferior (shopping) supply
- Cars, busses and taxi’s in the inner city
- Too many events, too much for tourists, little for residents
- Other

ANTWERP 2019
GHENT 2019
LEUVEN 2019
MECHELEN 2019
BRUGES 2019
TOTAL 2019

RESIDENTS ART CITIES
RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
  • Support for tourism
  • Impact of tourism
    • Livability
    • Perception positive impact
    • Perception negative impact
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  • Future
  • Other

• CONCLUSIONS
RESULTS – 2019

Positive impact of tourism

- Because of tourism there is more liveliness in my city: 74%
- A growth in the number of tourists strengthens the economy of the entire city: 71%
- Because of tourism development the physical appearance of my city has improved: 70%
- Tourism helps preserving our cultural identity: 59% (N*)
- Tourism contributes to the income and quality of life of the people in my city: 53%
- Because of tourism there are more shopping and recreational opportunities: 48%
- Tourism developments improve the quality of life in my city: 43%
- Because of tourism in my city there is an economical development in the district I live in: 19%

N*: no evolution possible
RESULTS – Evolution 2017 - 2019

Positive impact of tourism / 1

% ‘agreement’ with the statement ...

Because of tourism there is more liveliness in my city
A growth in the number of tourists strengthens the economy of the entire city
Because of tourism development the physical appearance of my city has improved
Tourism helps preserving our cultural identity

% ‘agreement’ – 2017 indicated with

N*: no evolution possible

ANTWERP 2019  GHENT 2019  LEUVEN 2019  MECHELEN 2019  BRUGES 2019  TOTAL 2019

RESIDENTS ART CITIES
RESULTS – Evolution 2017 - 2019

Positive impact of tourism / 2

% ‘agreement’ with the statement …

% ‘agreement’ – 2017 indicated with ■

N*: no evolution possible
RESIDENT STUDY

• METHODOLOGY
• RESULTS
  • Key results
  • Support for tourism
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• CONCLUSIONS
RESULTS – 2019

Negative impact of tourism

Because of tourism there are more parking issues in my city
Because of tourism the cost of living in my city increases
Students cause more nuisance in my city than tourists
Because of tourism there are more traffic issues in my city
Because of tourism the city centre gets overcrowded
The growth of tourism will result in a decline of inhabitants in...
Because of tourism there is more litter in my city
Because of tourism the high streets lose diversity
An increase in tourists will lead to friction between...
The attitude and disrespectful behaviour of tourists is an issue
Because of the growth of tourism, the attitude of residents...
Because of tourism we lose the authentic character of our...
Because of tourism there is more criminal activity in my city

N*: no evolution possible

– 2017 indicated with X
RESULTS – Evolution 2017 - 2019

Negative impact of tourism / 1

% ‘agreement’ with the statement ...

% ‘agreement’ – 2017 indicated with —

Because of tourism there are more parking issues in my city
Because of tourism the cost of living in my city increases
Students cause more nuisance in my city than tourists
Because of tourism there are more traffic issues in my city

ANTWERP 2019  GHENT 2019  LEUVEN 2019  MECHELEN 2019  BRUGES 2019  TOTAL 2019

N*: no evolution possible
RESULTS – Evolution 2017 - 2019

Negative impact of tourism / 2

% ‘agreement’ with the statement … % ‘agreement’ – 2017 indicated with □

Because of tourism the city centre gets overcrowded
The growth of tourism will result in a decline of inhabitants in the city centre
Because of tourism there is more litter in my city
Because of tourism the high streets lose diversity

ANTWERP 2019 GHENT 2019 LEUVEN 2019 MECHELEN 2019 BRUGES 2019 TOTAL 2019

N*: no evolution possible
RESULTS – Evolution 2017 - 2019

Negative impact of tourism / 3

% agreement

An increase in tourists will lead to friction between homeowners and tourists
The attitude and disrespectful behaviour of tourists is an issue
Because of the growth of tourism, the attitude of residents towards tourists becomes an issue
Because of tourism we lose the authentic character of our neighbourhood
Because of tourism there is more criminal activity in my city

ANTWERP 2019  |  GHENT 2019  |  LEUVEN 2019  |  MECHELEN 2019  |  BRUGES 2019  |  TOTAL 2019

N*: no evolution possible
RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
  • Support of tourism
  • Impact of tourism
  • Drivers of support for tourism
    • Proudness (Psychological empowerment)
    • Economic benefit (Economical empowerment)
    • Social empowerment
    • Involvement (Political empowerment)
  • Future
  • Other

• CONCLUSIONS
RESULTS – Evolution 2017 - 2019
Proudness

% ‘agreement’ with the statement “Because of tourism …”

% ‘agreement’ – 2017 indicated with ■

I am proud to be a resident of my city
I want to tell others what my city has to offer
I am reminded I have a unique culture, that I want to share with visitors
I want to work to keep my city special

ANTWERP 2019
GHENT 2019
LEUVEN 2019
MECHELEN 2019
BRUGES 2019
TOTAL 2019
RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
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  • Impact of tourism
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    • Economic benefit (Economical empowerment)
    • Social empowerment
    • Involvement (Political empowerment)
  • Future
  • Other

• CONCLUSIONS
RESULTS – 2019

Personal economic benefit

“(A part of) my income is linked to tourism in my city” (N*)

% ‘yes’

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<tbody>
<tr>
<td>Antwerp</td>
<td>12%</td>
<td>11%</td>
<td>14%</td>
<td>11%</td>
<td>16%</td>
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<tr>
<td>Ghent</td>
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<td>Leuven</td>
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<td>Mechelen</td>
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<tr>
<td>Bruges</td>
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<tr>
<td>Total</td>
<td>13%</td>
<td>11%</td>
<td>14%</td>
<td>11%</td>
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N*: no evolution possible
RESIDENT STUDY

• METHODOLOGY

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    • Social empowerment
    • Involvement (Political empowerment)
  • Future
  • Other

• CONCLUSIONS
RESULTS – Evolution 2017 - 2019

Social empowerment

% ‘agreement’ with the statement “Tourism in my city ….”

– 2017 indicated with ☐

- fosters understanding for other people (less prejudices / stereotypes)
- creates nice encounters with visitors
- ensures that we are more connected to each other in our city

N*: no evolution possible
RESULTS – 2019

Social empowerment

“Tourism in my city fosters understanding for other people (less prejudices / stereotypes)”

N*: no evolution possible
RESULTS – 2019

Social empowerment

“How badly do you want to have contact with the visitors of your city?” (N*)

ANTWERP 2019  |  GHENT 2019  |  LEUVEN 2019  |  MECHELEN 2019  |  BRUGES 2019  |  TOTAL 2019

Reluctantly: 12%  |  15%  |  16%  |  15%  |  14%  |
Neutral: 53%  |  56%  |  50%  |  51%  |
Eagerly: 48%  |  40%  |  32%  |  37%  |  30%  |

N*: no evolution possible
RESULTS – 2019

Social empowerment

“How do you want to get in contact with the visitors of your city?” (N*)

- In case respondents eagerly or neutrally want contact with visitors

N*: no evolution possible
RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
  • Support of tourism
  • Impact of tourism
  • Drivers of support for tourism
    • Proudness (Psychological empowerment)
    • Economic benefit (Economical empowerment)
    • Social empowerment
    • Involvement (Political empowerment)
  • Future
  • Other

• CONCLUSIONS
RESULTS – 2019

Feeling of involvement

% ‘agreement’ with the statement: “I feel that ...” (N)

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<tbody>
<tr>
<td>I have an outlet to share my concerns about the tourism developments in my city</td>
<td>13%</td>
<td>17%</td>
<td>18%</td>
<td>20%</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>I can be heard concerning my ideas about tourism developments in my city</td>
<td>15%</td>
<td>19%</td>
<td>22%</td>
<td>22%</td>
<td>24%</td>
<td>20%</td>
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RESULTS – Evolution 2017 - 2019

Feeling of involvement

Would you like to be more involved in the tourism policy/ initiatives of your city?

– 2017 indicated with ☑️

- 2017 indicated with ☑️
RESULTS – 2019

Feeling of involvement

% ‘agreement’ with the statement … (N*)

- The city council takes sufficient account of the interests of the local population in its tourism policy
- The city government pays too much attention to tourism compared to other policy sectors
- The potential negative effects of tourism are given sufficient attention in the tourism policy
- The potential positive effects of tourism are given sufficient attention in tourism policy

ANTWERP 2019
GHENT 2019
LEUVEN 2019
MECHELEN 2019
BRUGES 2019
TOTAL 2019

N*: no evolution possible
RESIDENT STUDY

- METHODOLOGY

- RESULTS
  - Key results
  - Support of tourism
  - Impact of tourism
  - Drivers of support for tourism
  - Future
    - Recommendations policy
    - How to handle pressure
    - More or less tourists
    - Move to another location

- Other

- CONCLUSIONS
RESULTS – 2019

Recommendations policy

“There are different ways to handle visitor pressure. Could you indicate to what extent you would support these several options in …” – % score 4 or 5 out of 5

- Inform local residents and local companies about and involve them in tourism planning: 68%
- Focus on visitors who strive for immersive experiences and who take their time to discover the city: 62%
- Create route descriptions to guide visitors along specific routes: 60%
- Encourage visitors to spend more time in tourist attractions (e.g., museums): 55%
- Provide a wider range of evening activities: 54%
- Reduce the impact of my city’s tourism sector on the world’s climate: 50%
- A better spread of visitors throughout the year: 50%
- Focus on less burdenful target groups (individuals, overnight guests): 49%
- Create experiences / occasions where residents and visitors can meet and integrate with each other: 49%
- Focus on tourism with high economic added value: 47%
- Communicate better with visitors on how they should behave: 44%
- Less onerous forms of tourism should be taxed less than more onerous forms of tourism: 43%
- Spreading visitors and tourist activities that do not burden the quality of life to ‘new’ destinations INSIDE: 42%
- A better spread of visitors throughout the day: 39%
- Spreading visitors and tourist activities that do not burden the quality of life to ‘new’ destinations...: 37%
- Tourism should be limited to the actual tourism area in my city: 25%
- Create and apply stricter rules, e.g., for the opening hours of restaurants and cafés: 19%

N*: geen evolutie mogelijk

- 2017 indicated with X

TOTAL 2019 × Totaal 2017
RESULTS – Evolution 2017 - 2019

RECOMMENDATIONS POLICY / 1

“There are different ways to handle visitor pressure. Could you indicate to what extent you would support these several options in ...” - % score 4 or 5 out of 5

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<tbody>
<tr>
<td>Inform local residents and local companies about and involve them in tourism planning</td>
<td>69%</td>
<td>67%</td>
<td>66%</td>
<td>70%</td>
<td>68%</td>
<td>66%</td>
</tr>
<tr>
<td>Focus on visitors who strive for immersive experiences and who take their time to discover the city</td>
<td>65%</td>
<td>63%</td>
<td>56%</td>
<td>55%</td>
<td>62%</td>
<td>61%</td>
</tr>
<tr>
<td>Create route descriptions to guide visitors along specific routes</td>
<td>61%</td>
<td>58%</td>
<td>60%</td>
<td>59%</td>
<td>64%</td>
<td>60%</td>
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<tr>
<td>Encourage visitors to spend more time in tourist attractions (e.g. museums)</td>
<td>56%</td>
<td>55%</td>
<td>54%</td>
<td>53%</td>
<td>57%</td>
<td>55%</td>
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<tr>
<td>Provide a wider range of evening activities</td>
<td>50%</td>
<td>47%</td>
<td>48%</td>
<td>55%</td>
<td>54%</td>
<td>61%</td>
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N*: no evolution possible
RESULTS – Evolution 2017 - 2019

RECOMMENDATIONS POLICY / 2

“There are different ways to handle visitor pressure. Could you indicate to what extent you would support these several options in …” - % score 4 or 5 out of 5

% score 4 or 5 out of 5 – 2017 indicated with

N*: no evolution possible
RESULTS – Evolution 2017 - 2019

RECOMMENDATIONS POLICY / 3

"There are different ways to handle visitor pressure. Could you indicate to what extent you would support these several options in …" - % score 4 or 5 out of 5

% score 4 or 5 out of 5 – 2017 indicated with ☑️

N*: no evolution possible
RESULTS – Evolution 2017 - 2019

RECOMMENDATIONS POLICY / 4

“There are different ways to handle visitor pressure. Could you indicate to what extent you would support these several options in ...” - % score 4 or 5 out of 5

% score 4 or 5 out of 5 – 2017 indicated with

A better spread of visitors throughout the day

Spreading visitors and tourist activities that do not burden the quality of life to ‘new’ destinations OUTSIDE the core tourist area of my city

Tourism should be limited to the actual tourism area in my city

N*: no evolution possible
RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
  • Support of tourism
  • Impact of tourism
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  • Future
    • Recommendations policy
    • How to handle pressure
    • More or less tourists
    • Move to another location

• Other

• CONCLUSIONS
RESULTS – 2019

Handling the negative consequences

“How would you deal with the adverse effects of tourism if you had free choice and resources?”
(Multiple answers possible) - % yes

- 2019 indicated with X

- 46% N* I have not experienced any adverse effects from tourism in the last 3 years
- 32% I would avoid certain places or times during the day
- 18% I would address visitors who cause problems
- 17% I would engage in a constructive dialogue with the city
- 8% I would try to influence the public opinion or tourism policy (e.g. through letters, petitions, demonstrations, etc.)
- 7% I would leave the city
- 6% I would do nothing and take it for granted
- 5% I would move to another place in the city
- 2% Other, namely:

N*: no evolution possible
RESULTS – Evolution 2017 - 2019

HANDLING THE NEGATIVE CONSEQUENCES / 1

“How would you deal with the adverse effects of tourism if you had free choice and resources?”
(multiple answers possible) - % yes (part 1)

% yes – 2017 indicated with ▶

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<tbody>
<tr>
<td>I would avoid certain places or times during the day</td>
<td>35%</td>
<td>32%</td>
<td>46%</td>
<td>32%</td>
<td>46%</td>
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</tr>
<tr>
<td>I would address visitors who cause problems</td>
<td>20%</td>
<td>19%</td>
<td>13%</td>
<td>12%</td>
<td>15%</td>
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<tr>
<td>I would engage in a constructive dialogue with the city</td>
<td>20%</td>
<td>24%</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
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</tr>
<tr>
<td>I would try to influence the public opinion or tourism policy (e.g. through letters, petitions, demonstrations, etc.)</td>
<td>11%</td>
<td>10%</td>
<td>7%</td>
<td>8%</td>
<td>8%</td>
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<tr>
<td>I would leave the city</td>
<td>9%</td>
<td>9%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
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N*: no evolution possible
RESULTS – Evolution 2017 - 2019

HANDLING THE NEGATIVE CONSEQUENCES / 2

“How would you deal with the adverse effects of tourism if you had free choice and resources?”
(multiple answers possible) - % yes (part 2)

% yes – 2017 indicated with ■

N*: no evolution possible
RESIDENT STUDY

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    • Move to another location

• Other

• CONCLUSIONS
RESULTS – Evolution 2017 - 2019

Do residents want more, as many or fewer tourists?

% more – 2017 indicated with —

Those who stay overnight
- Individual tourists (couples, singles, people with children, etc.) - not in a group
- Congress tourists and business tourists
- Day travelers
- Recreational tourists
- Group tourists
- Cruise tourists

ANTWERP 2019
GHENT 2019
LEUVEN 2019
MECHELEN 2019
BRUGES 2019
TOTAL 2019

N*: no evolution possible
RESULTS – Evolution 2017 - 2019

Do residents want more, as many or fewer tourists?

% fewer – 2017 indicated with 

N*: no evolution possible
RESIDENT STUDY

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  • Drivers of support for tourism
  • Future
  • Other
    • Unique features city
    • Airbnb and others
    • Travels
• CONCLUSIONS
RESULTS – 2019
UNIQUE TO THE CITY
“What makes your city unique?” (N*)

N*: no evolution possible
RESULTS – 2019
UNIQUE TO THE CITY / 1

“What makes your city unique?” (N*)

Heritage
Art and culture (museums)/ tourist offer
Ecologie, green, parks, water
History
Tolerance, openness, multicultural, hospitality
Relaxation and entertainment possibilities
Small-scale metropolis

N*: no evolution possible

ANTWERP 2019
GHENT 2019
LEUVEN 2019
MECHELEN 2019
BRUGES 2019
TOTAL 2019

RESIDENTS ART CITIES
RESULTS – 2019
UNIQUE TO THE CITY / 2

“What makes your city unique?” (N*)

N*: no evolution possible
RESULTS – 2019
UNIQUE TO THE CITY / 3

“What makes your city unique?” (N*)

N*: no evolution possible
RESIDENT STUDY

• METHODOLOGY

• RESULTS
  • Key results
  • Support of tourism
  • Impact of tourism
  • Drivers of support for tourism
  • Future
  • Other
    • Unique features city
    • Airbnb and others
    • Travels

• CONCLUSIONS
RESULTS – 2019
AIRBNB

“Have you ever heard of sharing platforms like Airbnb (or similar sharing economic platforms, like Windu, ... in which residents rent out chambers or entire houses to tourists)?” (% YES) (N*)
RESULTS – 2019

AIRBNB

Using – renting out – knowing (% YES) (N*)
– In case respondents know Airbnb

I have used Airbnb myself (or similar sharing economie platforms like Wimdu, …) to book an overnight stay at home or abroad
I rent out accommodations myself using Airbnb (or similar sharing economie platforms like Wimdu, …)
I know people in my city who rent out accommodations using Airbnb (or similar sharing economie platforms like Wimdu, …)

ANTWERP 2019
GHENT 2019
LEUVEN 2019
MECHELEN 2019
BRUGES 2019
TOTAL 2019

N*: no evolution possible
RESULTS – 2019

AIRBNB

% ‘agreement’ with the statement ... (N*)
– In case respondents know Airbnb

% ‘agreement’

N*: no evolution possible
RESIDENT STUDY

- METHODOLOGY
- RESULTS
  - Key results
  - Support of tourism
  - Impact of tourism
  - Drivers of support for tourism
  - Future
  - Other
    - Unique features city
    - Airbnb and others
    - Travels
- CONCLUSIONS
RESULTS – 2019

TRAVELS

“How often do you travel (with at least 1 overnight stay) at home or abroad?” (N*)

N*: no evolution possible
RESULTS – 2019

‘Support for tourism’ & ‘Holiday participation’ (‘not going on holiday, little or often’)

“I support tourism in my city and I want it to remain important’

Going on holiday:
- NEVER
- LESS THAN 1X/YEAR
- 1X/YEAR
- 2X/YEAR
- 3X/YEAR OR MORE
RESIDENT STUDY

• METHODOLOGY
• RESULTS
• CONCLUSIONS