Mobility and spending survey 2024

platform binnenstads management

movares smart urban engineering

BRO | a movares company

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'Almost every city centre area struggles to properly accommodate mobility in a densifying city'

Ostend
Source: Nick Decombel Photography

Breda St. Janstraat
Source: Floris Oosterveld

Foreword

Major transitions are taking place in the Netherlands. Space is scarce due to an increasing need for housing, public accomodations and attractive public space. Good accessibility for everyone to city centre areas is becoming increasingly important. Mobility is hot. Hot in the sense that almost every city centre area is struggling to fit mobility into a densifying city. Hot in the sense that the emotions often run high in discussions. With this research, we really tried to put something down that contributes to the debate. In 2023, we conducted this research on a large scale for the first time. Given its success, we conducted the second round in 2024 with new city centres. In total we have now provided 37 city centre areas with information and we are very happy that. It is by getting together and sharing knowledge/experience with each other that we move forward.

Of course, we incorporated the lessons and experience from last year into this study. We delved even deeper and went into certain questions even more specifically. Because we noticed that our research caused some controversy, and our conclusions were sometimes questioned, this year we chose to involve various external experts in the form of a sounding board group.
We are very pleased with the commitment and skill of the participants and would like to thank them for their efforts. In this report we have tried to put down conclusions in a more nuanced way, with the goal that people also continue to pay attention to the nuanced story.

We thank the participating city centre areas for their trust in us. We have also reserved the 2023 city centre areas with this study by including those city centres in some analyses. In doing so, we hope to continue to include these city centres in knowledge sharing as well. We have thus a trend, with an annual "Relocation and Spending Survey". After all, only by monitoring can we learn lessons about the effectiveness of mobility measures on the economy in city centre areas.

On behalf of the entire project team

Robin van Lieshout	*Team leader Functions & Policy / retail expert*
Rutger Koop	*Consultant retail & smart cities*
Jochem Buurstede	*Advisor sustainable area development*
Janny van Empel	*Secretariat & project support* Marco
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Marise Zuurbier	*Advisor Mobility*

Leiden New Rhine
Source: municipality of Leiden

1. Introduction

This chapter describes the background and research methodology.

1.1 Background

The relationship between mobility and spending generates much discussion in practice between entrepreneurs, property owners and municipalities. Entrepreneurs mainly see the importance of car visitors and parking spaces because of spending. Municipalities often want fewer cars and parking spaces in order to make city centres more attractive, greener and more sustainable. Moreover, parking spaces cost a lot of space, which is scarce in a densifying city and where space for time to stay must also be realised. The task is to optimise the liveability and attractiveness of city centre areas for residents and visitors in good cooperation.

A great deal of research has already been done into the relationship between mobility and spending. What Platform Inner City Management and research partners BRO and Movares have noticed is that these studies are often based on a single interest, are incomplete and/or unsubtle. In order to have an 'honest' discussion on this subject, Platform Binnenstadsmanagement, BRO and Movares have joined forces. By the end of 2023, 18 city centres participated in the survey for the first time[1]. In 2024, 19 new city centre areas participated *(see map)*. From large to small, scattered across the Netherlands and Flanders. The basis of this research consists of visitor surveys. A multilingual questionnaire administered face-to-face was conducted among visitors to the city centre. The questionnaire asked visitors about provenance, motive of visit, means of transportation, motive of transportation, frequency of visit and spending by sector, among other things. The questionnaire was also administered through other online methods.

The focus of this report is on the 19 city centres that participated in 2024. The benchmark also includes the city centres that participated in 2023. In addition to the main report, we have prepared a more in-depth report for each city centre.

1 *Alphen a/d/ Rijn, Bogaard Stadscentrum, Oud Rijswijk, Middelharnis, Oosterhout, Goes, Tilburg, Boxtel, 's-Hertogenbosch, Oss, Nijmegen, Arnhem, Apeldoorn, Groningen, Den Helder, Venlo, Roermond, Maastricht.*

1.2 Research questions

The main question and sub-questions are as follows.

What is the relationship between mobility and economy in city centres?

Basic questions

- Where do visitors come from?
- Are people coming directly from home or from elsewhere?
- Why do people come to the city centre ?
- How often do people come to the city centre?
- What personality characteristics do visitors have?
- Did people prepare for the trip to the city centre?

Mobility Questions

- By what means of transportation do visitors come?
- What combinations of transportation modes do visitors make?
- Do people always choose the same mode of transportation or does it change?
- Why do people choose a particular mode of transportation?
- Why does behaviour change in mode choice?

Spending questions

- In general how much do visitors spend?
- How much do visitors spend by sector/industry?

Deepening questions and intersections

- What is the average spending per mode of transportation?
- How does visitation and spending behaviour differ by target group?
- What is the relationship between provenance, spending and mobility?
- What is the relationship between visit frequency and mobility?
- What is the impact of parking regimes?
- What is the impact of a city centre's overall profile?
- What proportion of total sales do transportation modes account for?

1.3 Research justification

Measurement methods

The results from this study are based primarily on face-to-face street surveys. These surveys were collected by fieldwork agency Responsified. At n=385 completed surveys per city centre, this gives a 95% confidence level for the basic questions. For intersections and extended questions, the reliability is lower. Sufficient observations were always considered on a case-by-case basis. Where possible, response categories were combined. Choices were made for each city centre, sometimes with indicative results. The surveys were conducted at several locations scattered throughout the city centre, on different days and time blocks during the month of October 2024. Some city centres employed additional fieldwork methods in addition to face-to-face surveys, namely:

- **Via QR codes on posters/flyers**: This refers to the same questionnaire as the face-to-face survey. This questionnaire was accessible digitally via QR codes in store windows of stores and restaurants, at central locations and/or via flyers that were distributed in the city centres.

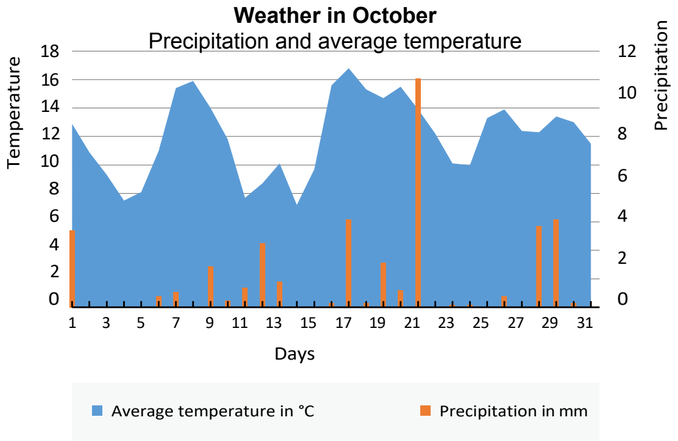
- **Residents' panel**: This is a questionnaire distributed to residents through citizen panels of municipalities. Thus, this questionnaire is not representative of the entire visitor population, but only for the target group 'visitors residing in the municipality'. This questionnaire had a similar format to the one mentioned earlier, with the exception that it did not ask about 'today' but about 'the last time'.

- **Social media**: This is the same questionnaire as the panel survey, but it was distributed via an open link via social media or via QR codes in local media, newspapers, etc.

It should be noted that the results from face-to-face street survey were merged with the results from the questionnaire distributed in some city centres via QR codes/flyers. The other two methods were used as a supplement in the in-depth reports per city centre to better interpret residents in particular. Only for Shopping Center Overvecht was the panel response (weighted) included in the basic analyses, since the majority of visitors come from the municipality of Utrecht.

Representativeness and reliability

The results from the face-to-face street surveys cover all visitors to the city centre, so both more frequent visitors and occasional tourists. Also included is all spending, so not only in stores, but also in hospitality, services, culture and other facilities. The fieldwork was conducted in October, per city centre on several days and times (ranging from 9:00 a.m. to 8:00 p.m.). Through a control question and experiences in other research, we know that September and October are representative months for an annual average. Surveys were conducted at several central locations in the city centre area to ensure the most objective distribution of transportation mode.



A good distribution was chosen for each city centre. People were randomly addressed by experienced outreach workers. Particular attention was paid to addressing hard-to-reach target groups, such as young people and foreign tourists. The weather in October 2024 was fairly average, with a good variation in sunshine, clouds and rain. The temperature was moderate. All completed questionnaires were checked for errors/outliers.

Guidance group

This report was produced in coordination with the participating city centre authorities. During the process several interpretation sessions were held with the guidance group. Each city centre had a minimum of one and a maximum of three people involved. Usually from the municipality (mobility and economy) and sometimes also a representation of entrepreneurs and/or property owners (city centre manager).

Sounding board

The analyses and conclusions from this main report were reviewed with an external group of experts: the sounding board group. Several interpretation sessions were also held with this group. Initially to gather ideas for the analysis and secondly to test conclusions and sharpened. Because of the sounding board group, the quality and accuracy of this report is even better assured. We thank all members of the sounding board group for their efforts and involvement.

- **Peter van de Waerden**, TU Eindhoven, Architecture. Peter deals with traffic and transportation issues. Parking in inner-cities runs like a thread through his career. Looking at the interaction between the built environment and traffic/transportation.
- **Paul van de Coevering**, lecturer in Spatial Development and Mobility at Breda University. The collection and use of data finds Paul very important. He recently completed a study "Smart city management" in which he examined how the city functions and what that means for it.
- **Jan Boots**, CityD-WES. Jan was Flanders' first city centre manager years ago. He has always been involved with inner city dynamics. For example, he joined BRO years ago and from there started a company in Flanders that advises in retail and inner city issues. In Flanders, recent research was done on Flemish policy and its effects on inner cities. One of its conclusions was that mobility interventions had a neutral effect on inner cities.
- **Jaap Kaai**, independent spatial development consultant, Emma Retail, particularly in the area of retail, city centre development and inner cities for municipalities, entrepreneurs and real estate. Jaap gives advice on this but also conducts research. In addition, he is a lecturer in Real Estate Studies at Fontys 2 days a week.
- **Anouk Mensen**, self-employed, AnalyZus. Anouk deals with research in shopping areas and their functioning and then focusing particularly on data. For example, in what ways can you monitor sales or visitors to shopping areas.
- **David Lansen**, Royal INretail, senior policy advisor. The retail non-food trade association is making its case at all levels hard for attractive shopping areas. Retailers must work locally with municipalities, city centre managers and other parties and take the lead to ensure livability and attractiveness combine for visitors and residents. From regional advocacy, David is putting this together with, for example, advisory agencies and provinces.
- **Peter Jagersma**, NS. NS has some 800 stores at its stations. There are also pop-ups at a number of stations. Peter keeps engaged in market activation, making a trade-off between commerce or experience.
- **Sjoerd Stienstra**: urban traffic consultant. Common thread in his consultancy is the interaction between land use and mobility. Traffic does not arise spontaneously, but is closely related to the economic and social functions of villages and towns. Parking (of cars and bicycles) is the link between traffic and stay. Besides local consultancy, Sjoerd has more exploratory studies to his name, including in the field of transport mode choice, search traffic and visitor behaviour, and he was a lecturer in Parking Research in the post-HBO course parking manager.
- **Danique Gommers**, teacher of mobility and study coach at Breda University of applied sciences. Danique graduated there in 2020 and, before starting teaching in 2023, worked at a consulting firm. She primarily teaches first- and second-year classes on various mobility topics, such as inventory and analysing urban traffic systems, parking, stakeholders / participation, etc. Furthermore, she has recently created a team around pedestrians with some colleagues, in order to better position this modality within the course. She is currently working on her Masters in Management (business administration) at Erasmus University.

Explanation of terms

- **(unique) visitor**: one individual.
- **Visit or visits**: the time or times one individual person visits the city centre.
- **Visiting unit**: the group size of the respondent. This can be one individual person, but can also be, for example, a family with father, mother and two children. In that case, the visitating unit consists of 4 people.
- **Spend per visit**: the amount spent by the visitor during one visit (in the survey, this is the day the particular respondent was surveyed).
- **Monthly spending**: the amount per visit mixed with the average frequency of visits per month.
- **Daily, recreational and targeted shopping**: these terms come from national shopping flow surveys. Daily refers to supermarkets, grocery stores and drugstores. Recreational refers to all non-daily retail offerings in industries such as department stores, household goods, fashion, sports, toys, media and hobby. Targeted refers to other non-daily retail offerings, such as home furnishings, do-it-yourself and garden items.

1.4 Response and sample

Table 1 shows the number of surveys collected by city centre, broken down by type of fieldwork. Almost all city centre areas have enough observations to make reliable statements (95% reliability). Due to the limited response rate as well as the planned transformation, The Hague Mega Stores has been removed from this report.

1.5 Privacy

The survey results were kept confidential. Responses cannot be traced back to individuals and in case of too few observations, results were not presented. No specific personal details of respondents were requested, such as address or telephone number.
In some cases, the e-mail address was requested for raffling a prize. Only the winners' results were shared and used only to contact them to present the prize. The e-mail address of any other participants was removed. A processing agreement was used.

1.6 Follow-up steps

This research contributes to mobility and vitality issues in city centre areas, but is by no means exhaustive. The efforts of the Platform Binnenstadsmanagement, BRO/Movares is to repeat this survey once a year around September/October. This will allow conclusions to be monitored and the research to be further expanded. In addition, it gives other city centres in the Netherlands the opportunity to participate in this national research. BRO/Movares also does in-depth analyses for various city centres based on these data. BRO/Movares also provides advice on the economic effects of mobility measures.

Table 1 **Response fieldwork**

city centre	Social media	Residents panel	Poster/Flyer	Face-to-face	Total
The Hague	-	-	-	345	**345**
Breda	-	2.748	36	400	**3.184**
Leiden	905	189	-	362	**1.456**
Hilversum	-	1.093	-	385	**1.478**
Drachten	-	-	-	354	**354**
Delft	-	-	5	440	**445**
Purmerend	-	-	15	395	**410**
Amstelveen	894	514	-	349	**1.757**
Vlaardingen	-	-	239	324	**563**
Wageningen	-	409	42	414	**865**
Terneuzen	521	-	-	365	**886**
Shopping city centre Overvecht	-	1.114	14	408	**1.536**
Leyweg	-	-	-	342	**342**
Frederik Hendriklaan	-	-	-	321	**321**
Bruges	-	-	-	315	**315**
Ostend	-	-	-	342	**342**
Leuven	-	-	15	272	**287**
Mechelen	-	-	122	397	**519**
Turnhout	643	-	-	363	**1.006**

1.7 Relationship to other studies

This survey has common ground with other visitor/passenger surveys and purchase flow studies. These other surveys also ask about spending, transportation mode choice, provenance and visit frequency. The difference is that this Mobility and Spending Survey really focuses on the relationship between mobility and spending, with specific analyses. So this is a deepening study. We have compared basic figures from this study with national shopping stream surveys. This shows that the results, for example with respect tto he modal split (distribution by mode of transportation) per city centre, is reasonably comparable to the results of shopping stream surveys.
Thus, results do not contradict each other and are complementary to each other.

1.8 Importance of monitoring

Understanding the current state of affairs is interesting, but it becomes even more interesting when you start monitoring. However, changes in buying and moving behaviour take a long time. For that reason, surveys of purchasing behaviour are usually conducted once every 3 to 4 years. For this Mobility and Spending Survey, that interval is also appropriate. Ultimately, we want to use all the data and monitoring to draw lessons from mobility measures and their effects. What is effective? What does work? What does not work?

Shopping in Bruges
Source: City of Bruges

2. Summary, conclusions and reflection

Based on the analysis, interviews and experiences, the conclusions were written. In addition, a reflection on mobility issues in city centre areas in relation to the economy was provided.

2.1 Connections and coherence

This research shows many interrelated relationships between indicators. The most important ones can be summarized as follows.

- Mobility choices are strongly related to provenance, convenience and travel time. Travel is a necessary evil. People usually choose the fastest and easiest option. Trends show that "convenience and efficiency" are increasingly important to visitors.
- The "effort" one is willing to put into traveling to a city centre area is related to the attractiveness and the quality and diversity of the offer. For large city centres with a lot of supply and diversity, people are willing to make more effort (travel longer), than small city centre areas with a shopping function.
- Visitors on foot usually come from the immediate area with a average travel time of about 12 minutes, visit the city centre more frequently, stay relatively short, and spend less per visit. Pedestrians are strongly tied to city centres because of the proximity often have no logical alternative.
- The average travel time of visitors by bicycle is similar to pedestrians, but they can travel a longer distance. A visitor by bicycle is therefore mostly from the immediate area. Compared to pedestrians, cyclists visit slightly less often, but spend slightly more per visit. Cyclists are also relatively strongly tied to the main city centres in their home town.
- The average travel time of visitors by car is much higher at about 30 minutes. This is comparable to public transportation. Logical, because city centres with a large catchment area attract many visitors from further away. Car visitors come less often, but when they do, they spend the most. This is related to the longer length of stay and the ability to easily take more things with them. However, car visitors are much less tied to one city centre area, because they have more alternatives within the same travel time.

2.2 Many differences between city centre areas

The differences between city centre areas are great. Each city centre has its own functional mix and appeal, and therefore a different catchment area. Making uniform black-and-white statements is therefore unwise and does not contribute to the challenges facing city centre areas. It is tempting to draw one conclusion or pick one figure from this report and link the entire mobility policy to it. There is often 'cherry-picking' or 'selective shopping' of facts and results. Our advice is to carefully consider and understand all the 'separate' puzzle pieces. Those puzzle pieces together determine what the final puzzle should look like. Nuance should be the starting point in the discussion.

2.3 Battle for space

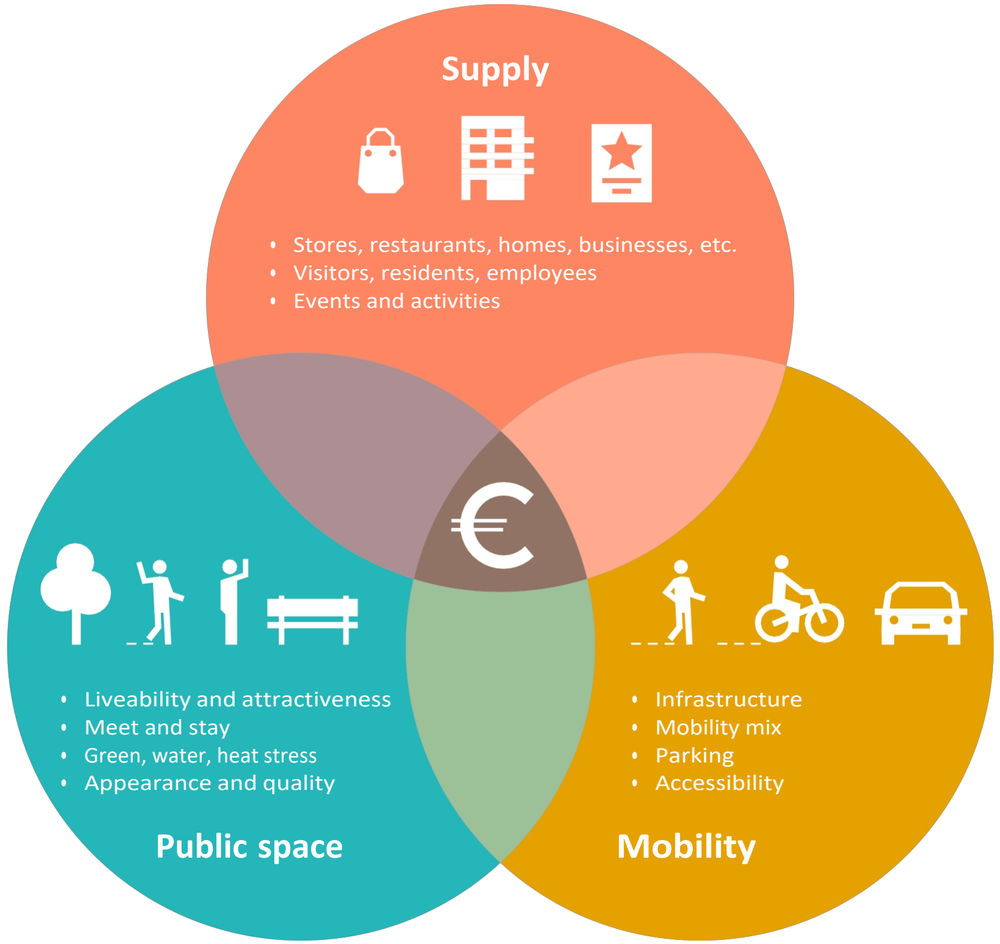
Pressure on physical space in city centre areas and inner cities is increasing. Space is scarce, so must be used more efficiently to accommodate all space claims. The goal should be a good balance between different interests for that space. After all, if you overshoot one interest, it may come at the expense of another. Ultimately, this can be at the expense of the economic vitality, liveability and attractiveness of a city centre area.

Supply. Buildings in the city centre facilitate functions such as commercial and community accomodations, businesses and residences. Supply increases and the mix of functions broadens. Buildings and functions are being added. This leads to more residents, visitors and spending. Events and the weekly market also contribute.

Public space. City centre areas are increasingly becoming places to stay and meet. They must be attractive areas where people like to come. Liveable centres for visitors and residents. We need space to meet, for terraces, seating, greenery, climate issues, etc. A good liveability leads to a more attractive city centre area and therefore to more spending.

Mobility. Accessibility of a city centre area is essential to fulfill its economic and social function. Mobility means accessibility for all target groups, fast and comfortable travel and sustainable solutions. A pleasant travel experience through a good mobility mix means more spending, provided there is enough to experience/offer. Space is needed for parking, public transport, bicycle and freeway lanes, pedestrian areas, etc. However, mobility is not a trigger. It does not add unique value. It can, however, create resistance. If the travel experience is not optimal, convenient and efficient, people quickly choose better alternatives such as another city centre area or the Internet.

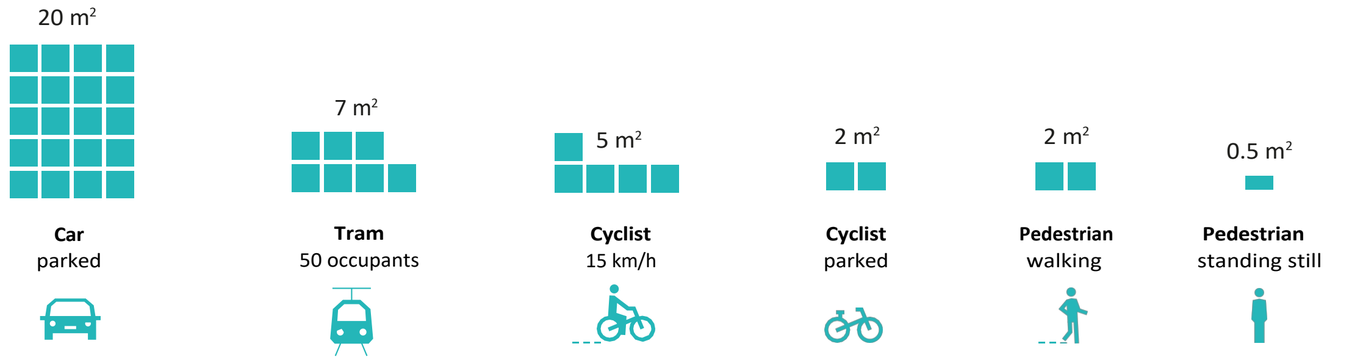
Figure 1 **Balance of economic vitality city centre areas**



2.4 What is a good balance?

There is no generic magic formula for an optimal spatial balance between supply, public space and mobility. This depends on the nature of the city centre area. Thereby, the aforementioned three space demands and city centre areas are constantly changing due to trends and developments. Many municipalities are drafting and implementing car-free mobility policies in city centre areas. Mobility measures are "traditionally" tested for their effect on accessibility and safety. We (unfortunately) still see that the domain 'economic vitality' is not explicitly part of impact assessment; while this is of great importance for a city centre area. There must therefore be accounted for effects on the economy c.q. spending before mobility policies are set and mobilisation interventions are made. This study provides the building blocks and insights to capture these effects. The effects of mobility measures must be considered in conjunction with supply and public space policies and measures. The desire to add more housing and green space, for example, means more pressure on parking capacity. At the same time, a different supply and more attractive public space also offer opportunities to more visitors.

Figure 2 **Space use by modality**
Stationary / parked



2.5 Travel is a necessary evil

This research shows that mobility behaviour is strongly related to the nature and size of a city centre area. The choice of transportation mode is primarily based on convenience and efficiency. The trip to get somewhere is a necessary activity and should be as easy as possible. A visitor sees the trip to a city centre area as a burden. It is an action as well as an expense, necessary to do a worthwhile activity. For a city centre area where there are many activities and functions, people are willing to put more effort in than for smaller shopping centres. Travel time may "cost" more (in time and/or money). The car has the largest space claim, but makes a significant contribution to revenue in most cases.
If you want people to come more on foot, by bicycle or by public transport, this is only going to work if these modes are an easier and more logical alternative for a visitor. Based on this research and practice, you can always only entice a portion of visitors to choose another mode of transportation. Behavioural changes are difficult to achieve in a general sense. Only a well-connected package of mobility can achieve this. Even then, it will not be easy. Transport behaviour is very much a matter of habit. People only start thinking about other transport behaviour when a 'calamity' occurs. Only when that new behaviour is 'ingrained' and situations are permanent and structural, can a permanent adaptation be expected.

2.6 Reality versus wishful thinking: who else can I seduce?

The 'gain' you can make in shifting transport mode choice (modal shift) is greater for one city centre area than another. If you attract many visitors from further away (regional function), there is little chance that you can entice these people to walk or cycle. The travel time then simply becomes too great. Public transportation is a logical alternative only if it provides convenience and efficiency over car and cost. Note: the cost of the car often only looks at the out-of-pocket costs (fuel, parking). For a pure comparison, the total cost should be looked at (maintenance, insurance, tax, depreciation). If you have a lot of

(car) visitors from the immediate area, there is a greater potential to entice (some of the) people to leave the car (occasionally) and come by foot or bicycle instead. With this study, this can be further analysed per city centre. However, this involves customisation.

2.7 Degradation risk: first the sweet, then the sour

Moreover, the risk of harm must always be taken into account. By this we mean the chance that certain visitors will stop coming because of the (poor) accessibility and go to another city centre or buy online. Poor accessibility increases resistance. Large city centre areas with few direct competitors in the area have a lower risk of deterioration than medium and smaller centres that are visited mainly for shopping. Neighbourhood and community centres in the immediate area are quickly more convenient and efficient alternatives for visitors.
To minimise the risk of detriment, a coherent package of measures must always be deployed. In terms of sequence of implementation, the sweet should be deployed first and only then the sour. By sweet we mean positive interventions that for example benefit pedestrians, cyclists, public transport and/or encourage P+R-like structures. Only when the sweet is in order can the sour take effect, such as shrinking parking capacity, introducing or raising parking fees or limiting car accessibility. A good relationship between sweet and sour is also important to influence behaviour. In other words, you need both sweet and sour to change behaviour. For example, a P+R construction is not going to work if you still have easy and reasonably cheap parking in a city centre. Again, people usually choose the easiest alternative.

2.8 Consider different types of car visitors

You will also have to consider different target groups coming to the city centre in mobility policy. Zooming in on car visitors, there are roughly three groups of car motorists: (1) targeted visitors who want to be specifically (briefly) near a certain shop/business/function and prefer to park their car in front of the door or very close, (2) the 'shopping public' who often know the city centre and prefer to park nearby in a city centre car park and also accept the costs, (3) the occasional 'well-organised tourist' who is willing to visit a P+R and thus to make a little more effort. Depending on the type of city centre and the function mix, you want to facilitate all these (car) target groups to a certain extent. For example, if you decide to eliminate street parking in front of purpose-built facilities, that may be positive for the overall economic functioning of the city centre, because it creates space for greening or benches. But you then also have to accept that this can be very negative for that one particular business owner who depends on targeted visitors who park in front of the door. Moreover, good car accessibility can go well with spatial quality by realising parking in strategic places, more on the edge of the city centre. In short: good car accessibility does not have to equate to a lot of car infrastructure in the central parts of the city that detracts from quality.

2.9 Link mobility policy to broader city centre vision

Mobility goals and measures should never stand alone. Mobility should explicitly be part of a city centre vision or city centre plan: the strategic vision of the city centre area that is prepared in cooperation with all stakeholders. Mobility choices must be justifiable from the integral goals and ambitions. How does this contribute to an attractive city centre area? How does this strengthen economic functioning? What are the effects?It must be clear what departments involved within the Municipality of Space, Mobility and Economy must do together locally. In this way, municipalities, entrepreneurs, property owners and residents will be able to find each other in changes. Because only in good consultation and with a shared ambition and implementation can a city centre area be strengthened.

"Generally, in terms of total sales, approximately 1,000 car visitors are equivalent to about 500 pedestrians."

Shopping in Turnhout
Source: City of Turnhout

2.10 A unique pedestrian yields the most spending....

This research shows that visitors who live close by come relatively often and therefore spend more money and contribute significantly to the economic functioning of city centre areas. These visitors usually come on foot or by bicycle. If, as a city centre area, you manage to attract more of these people, it is very positive for economic functioning. Not only because on average they spend more, but also because they are strongly tied to the city centre (there is no logical alternative). Visitors from further away are more likely to come by car (or public transport) and tend to be the most important group in the share of total sales. However, you need many more unique visitors. In general terms, in terms of total sales, about 1,000 car visitors are equivalent to about 500 pedestrians. From national shopping stream surveys and trends it shows that the regional function of many (medium and small) city centre areas is shrinking. This means that it becomes increasingly difficult to attract unique visitors from further away. Moreover, these visitors often have more alternatives at equal distance, which means you lose these unique visitors faster (shrinking catchment area). A strong economic dependence may be a given at the moment, but could quickly crumble. This is shown purchasing power research.

Figure 3 **Average spending per month by mode of transportation (unique visitor)**
Based on 37 city centre areas

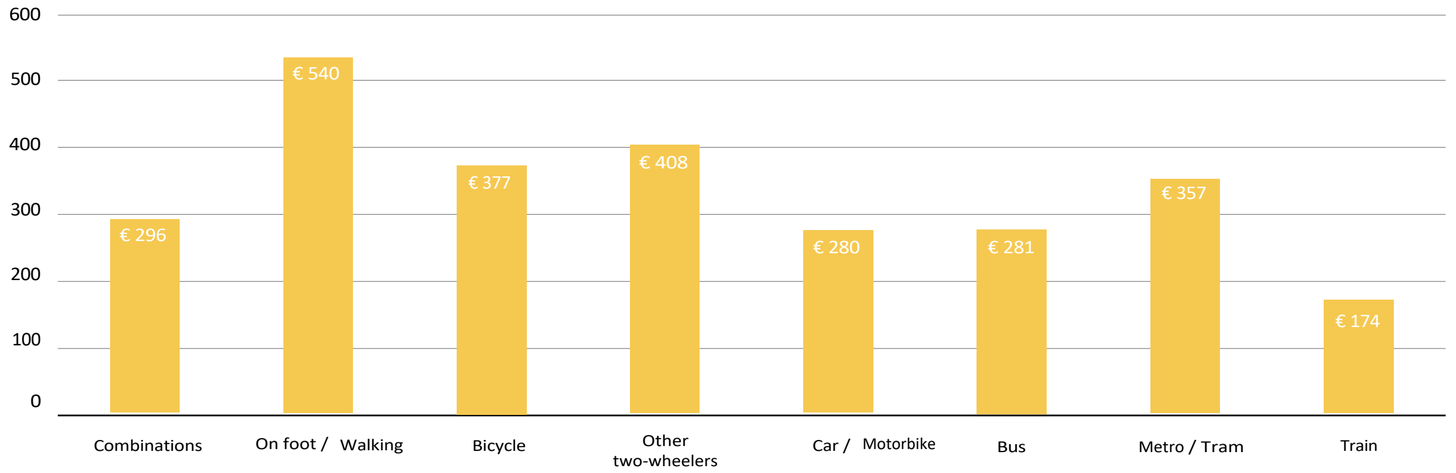
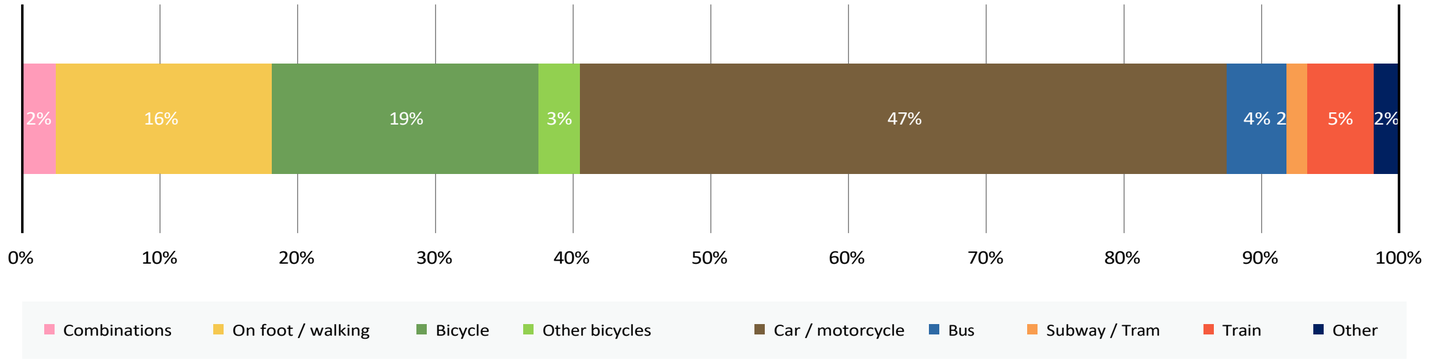


Figure 4 **Share of transportation mode in total sales**
Based on 37 city centre areas



2.11 ... but car is most important in share of revenue

To answer the question of which mode of transportation is most important in total sales, it is not only about the spending of unique visitors on a monthly basis. It is also about the total number of visitors attracted (visiting units). A city centre that manages to attract proportionately more unique car visitors than unique pedestrians will, on average, be more dependent on cars in total sales and vice versa. On average, for all centres 47% of sales are determined by visitors by car. The

pedestrians, cyclists and other bicycles together account for 38%. Public transport accounts for 11% of total sales. As indicated earlier, this share varies quite a bit by type of city centre, depending on its nature and size. It will also vary by day and period, but the average gives a good picture of the total.

2.12 Attract your own residents and you're a winner

In many cities there is a task to better balance supply, public space and mobility. Slightly dampening the dominance of the car is often necessary to improve the quality of public space. This is necessary to continue to attract unique visitors, including from the region. However, again, limiting or strengthening one specific mode of transportation should never be an end in itself. It is about using space more efficiently by freeing up infrastructure space for more attractiveness value in supply and/or public space. It pays economically to attract more of your own residents in particular. These are unique visitors who come relatively often and because of the shorter travel time are more likely to walk and cycle. In short, they spend more.
Moreover, the regional function of many small and medium-sized centres is under pressure: the regional function is shrinking. This is evident from shopping surveys. Policy that strives for more bonding with own residents is therefore important and recommended from multiple perspectives. This also shows the added value of infill development, the addition of new housing, to support the function of a city centre area. The provenance and visiting frequency of a visitor is also related to certain types of spending. Residents who live in or near a city centre will need facilities that provide frequent purchases and services in addition to recreational shopping.
This also fits in with the shift in the function mix of city centre areas: fewer (recreational) stores, more hospitality, (retail) crafts, services and social facilities.

2.13 Continue to facilitate car visitors

For larger city centre areas, with a clear regional function, car visitation remains essential for economic functioning. The same applies to smaller centres based primarily on convenience and efficiency, such as weekly (large) shopping. Continuing to facilitate good car accessibility, good parking facilities and sufficient parking capacity should always remain part of the mobility mix. However, visitors from further away are willing to make a little more effort, as long as the "cost" of parking is proportional to the "values" in the city centre area (supply and public space). Discussions are too often about 'all' or 'nothing': the car must go out or the car must go in. It is much more nuanced. It is ultimately about the right mobility mix relative to supply and public space and liveability. The previously mentioned target group approach to car visitors can also contribute to this.

Hilversum
Source: Municipality of Hilversum

Grote Markt in Breda
Source: Floris Oosterveld

3. Analysis base

This chapter presents basic facts for each city centre/inner city. On the one hand, this deals with the profile of the city centre/inner city, such as provenance, visit motive, visit frequency and length of stay. On the other hand, the chapter examines the profile of the visitor. Who is the visitor ? Looking at age, income, household composition and gender.

3.1 Composition of amenities offered

Introduction

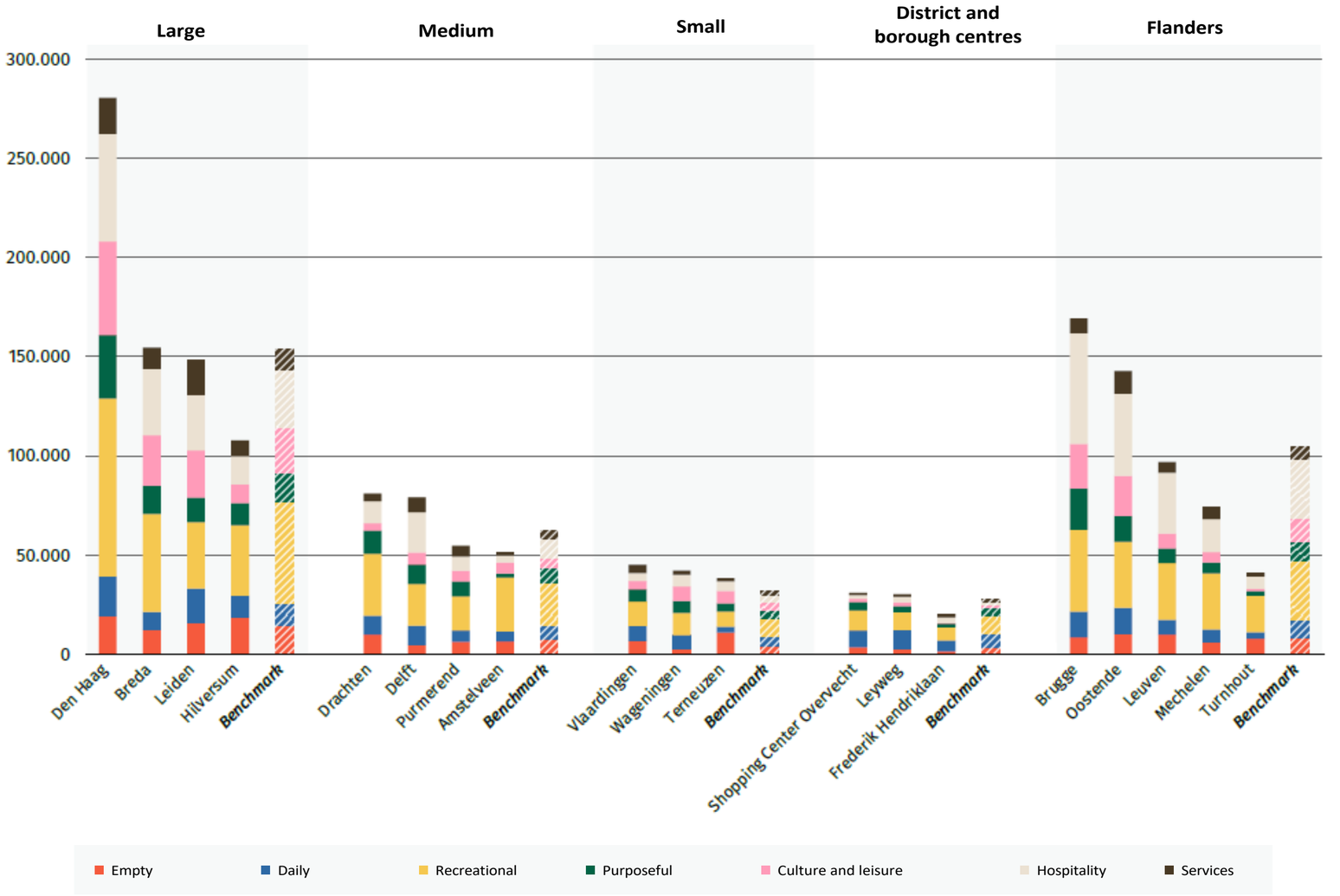
The composition and extent of the facilities on offer per city centre strongly influences visitor behaviour. The figure on the right shows the function mix per city centre based on Locatus (2024). This is based on the total public-oriented facilities on offer, including the vacancy rate expressed in m² of retail floor space (rfs). The total number of m² rfs per city centre is also leading for the benchmark. The next page shows the same function mix, but in relation to the total (=100%).

Large inner cities: many recreational stores and restaurants In all large inner cities the proportion of recreational stores is around 32-33%, except in Leiden. There the recreational shopping offer is only 22%. Leiden does have proportionally more daily shopping (12%) and services (12%). Breda stands out with its high share of the hospitality industry (22%). Hilversum, on the other hand, has relatively few catering establishments (13%), but a high vacancy rate (17%). The Hague is not only by far the largest city centre in absolute terms, but also has the highest share of culture and leisure (17%). Vacancy in The Hague is limited at 7%.

Medium-sized centres: a varying mix of functions

There are greater differences in the function mix between medium-sized centres, each with its own profile. The daily retail offer is similar everywhere, ranging between 10-13%. This is higher than the large city centres, but lower than the district and borough centres. The proportion of recreational shopping is lowest in Delft (26%) and highest in Amstelveen (53%). Delft does have a lot more catering establishments (26%) and little vacancy (6%) and thus has the highest proportion of catering establishments of all participating city centre areas. Interestingly, Amstelveen has a high share of recreational shopping as well as a relatively high share of culture and leisure (11%) for a medium-sized city centre.

Figure 5 **Functional mix, absolute in m(²) rfs**



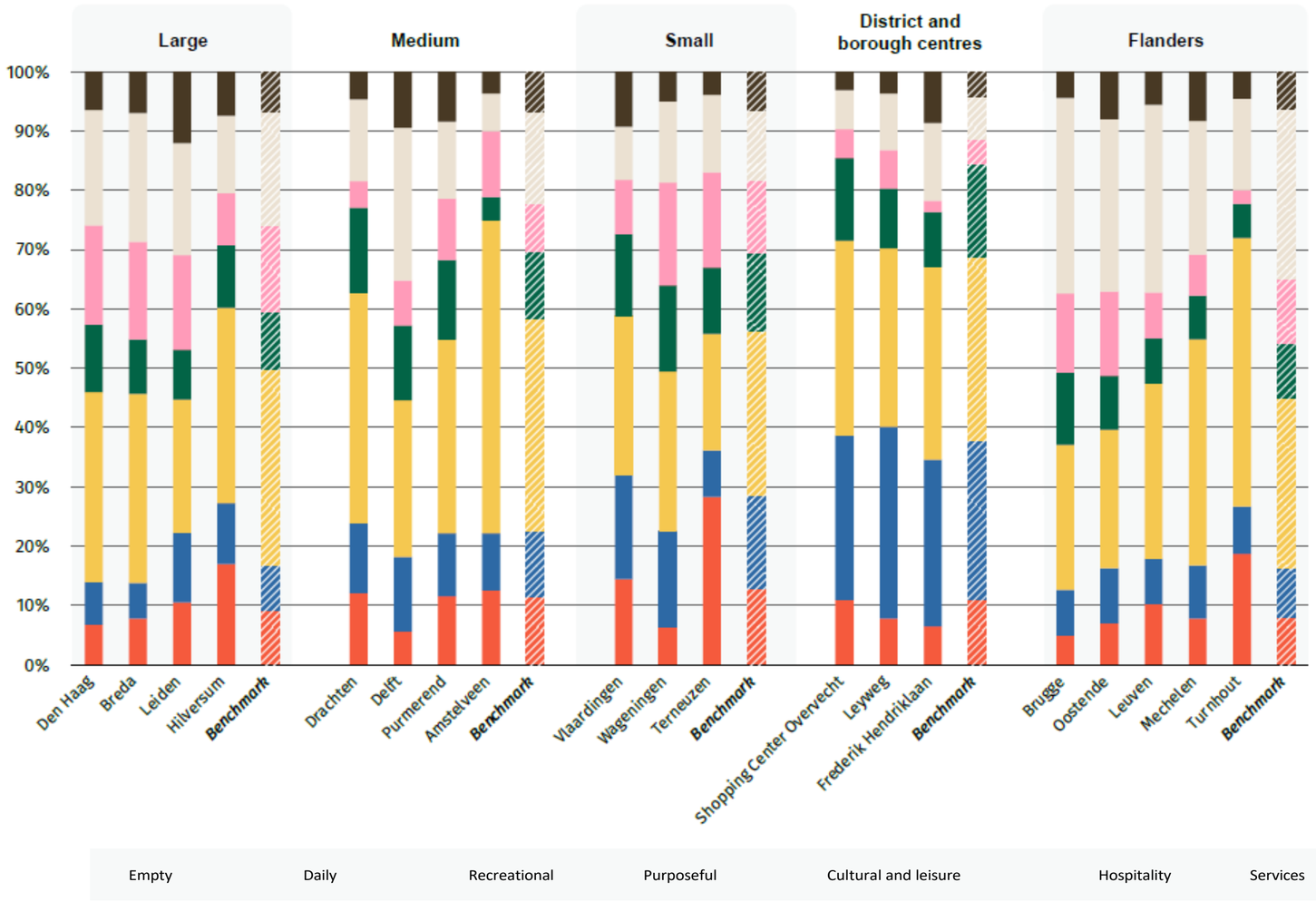
(source: Locatus 2024)

Small centres: lots of vacancy lots of grocery supply The smaller centres generally the highest proportion of vacancy, which in Terneuzen in particular rises sharply to 28%. Wageningen is a particular outlier. There the vacancy rate is comparatively limited (6%). Furthermore, the grocery offer is logically somewhat larger than in larger centres, with the exception of Terneuzen. There the daily supply is limited. The recreational shopping offer often consists of stores that are extension of daily shopping, such as Action, Hema and textile supermarkets, such as Wibra and Zeeman.

District and borough centres: even more groceries In the district and borough centres the grocery function is even more dominant in the functional mix. It is striking that Frederik Hendriklaan in particular has a relatively high proportion of catering establishments (13%) and services (9%). This underlines a special function in the facilities structure.

Flanders: relatively high hospitality industry
All Flemish centres are characterised compared to the Dutch centres with the relatively high proportion of hospitality industry. On the one hand, this is due to the entertainment culture and gastronomy in Flanders compared to the Netherlands. On the other hand, the coastal towns of Bruges and Ostend attract many tourists. Leuven is a real student city. The retail offer is therefore more limited in the total functional mix, but in absolute size reasonably comparable to Dutch centres.
Vacancy in Flemish cities varies quite a bit, with limited vacancy in Bruges (5%) and high vacancy in Turnhout (19%).

Figure 6 **Function mix, share of total m(2) rfs**



source: Locatus

3.2 Provenance

Introduction

The provenance of visitors says something about the catchment area. The figure on the right shows the provenanceof visitors to the centres. In the in-depth reports per city centre, a further deepening of the provenance areas is made for some centres. The provenance is the place from where the trip started. This is usually from home, but can also be the 'vacation place' or 'place of work/school". Note that only the face-to-face street surveys and fiyers/posters were counted in this report. To keep the distribution representative, the resident panels were not included. Only for Shopping city centre Overvecht has the resident panel been included (weighted).

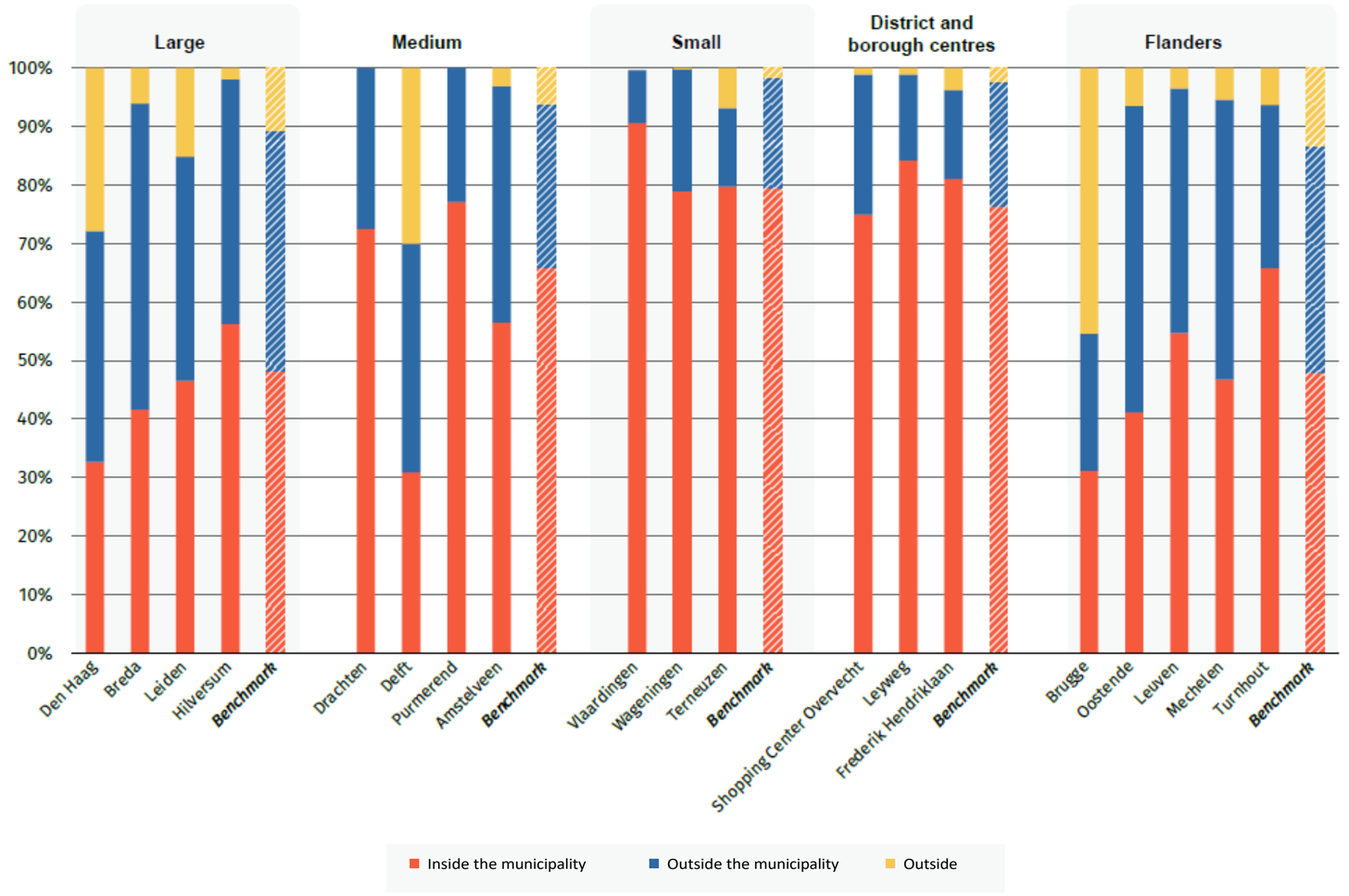
Large inner cities: larger catchment area

Logically, large inner cities attract more visitors from further away. The Hague is the largest city city centre in terms of size in this study and manages to attract 68% of visitors from outside the municipality, a large proportion of whom are foreigners (28%). These also usually do not come directly from home, but stay somewhere in the area (17%). Hilversum stands out because of the relatively high proportion of visitors who indicate coming from work or education, namely 22%.

Medium and small city centre areas: more locally caring

The smaller the city centre in terms of size, the greater the proportion of visitors from its own municipality. This means a more local service function. Of course, in this figure, the size of the municipality also plays a role. Delft stands out in particular. For a medium-sized city centre, Delft has a remarkably large catchment function comparable to the inner city of The Hague, also in terms of its appeal to foreigners. This is also evidenced by the fact that 20% of visitors come from a vacation address (and not directly from home).

Figure 7 **Provenance of visitors**



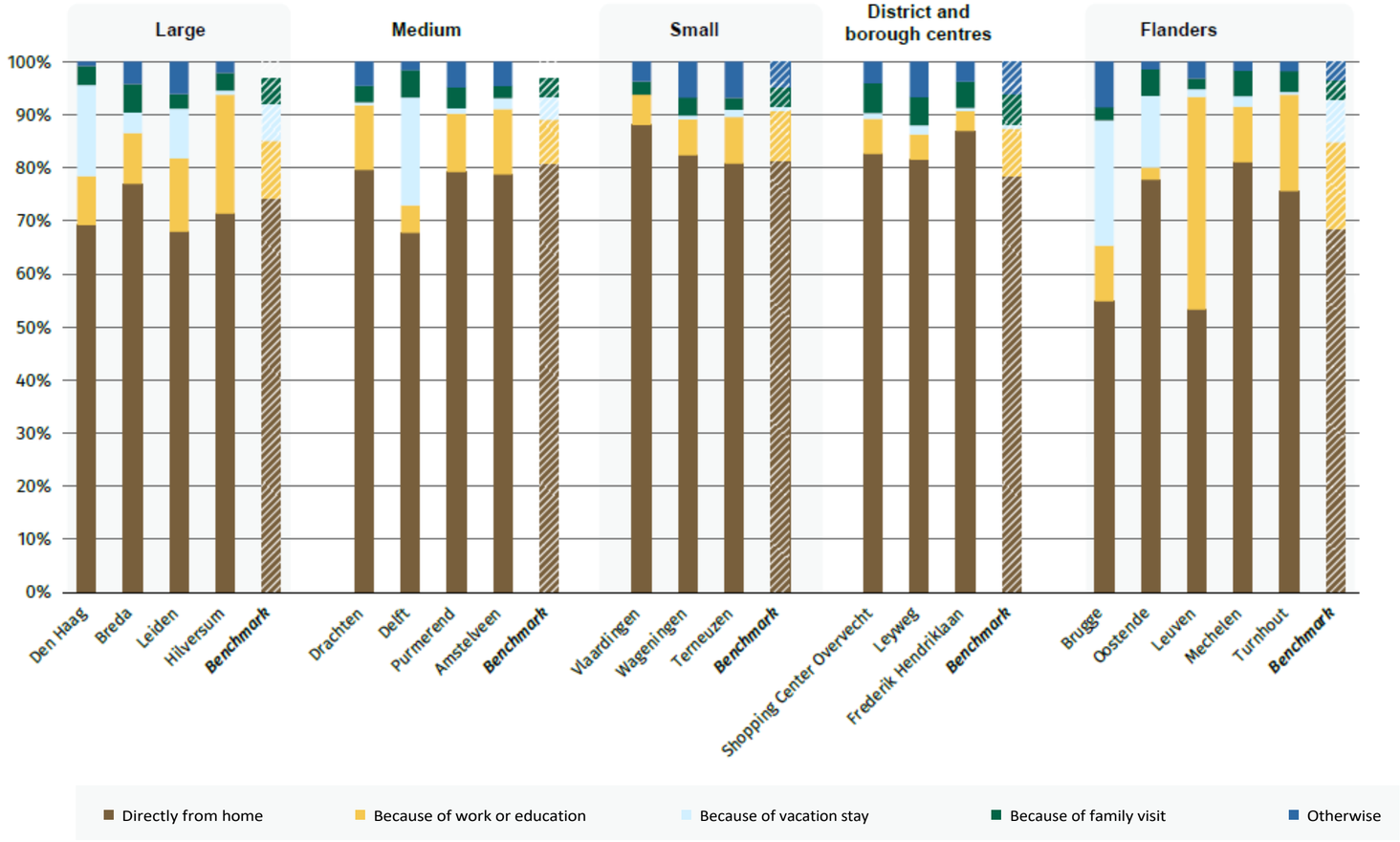
District and borough centres: local with a plus

The larger neighborhood and district centres primarily serve residents in the immediate area within their own municipality. Yet there is attraction from outside the municipality. This also depends primarily with supply. There are, similar to small inner cities reasonably many choices and the preconditions are often favourable for convenient and efficient purchases.

Flanders: from regional function to local caring

The differences between the Flemish centres are large. Bruges attracts many visitors from outside the municipality and especially from abroad (45%). This is due to its strong tourist appeal. Many visitors to Bruges come from vacation accommodation (23%).
Ostend, as a city centre on the coast, also manages to attract many people from outside the municipality (52%), but far fewer foreigners. Leuven, Mechelen and Turnhout also attract relatively many visitors from outside their own municipality. This confirms a certain regional function.
Leuven stands out in that many visitors say they are there because of work or education (40%). This is because Leuven is a student town with KU Leuven having several branches in and around the city centre.

Figure 8 **Provenance of visitors - from home or in combination with other visit purpose**



3.3 Visit motive

Introduction

The visit motive provides insight into "why" visitors come to a city centre. Respondents could choose from standard response categories and could also fill in 'other, namely'. For readability, the most important answer categories are shown in the figure. The rest have been combined under 'other'. In the in-depth reports for each city centre, we will discuss the 'other' category more specifically.

Large inner cities: still a lot of shopping

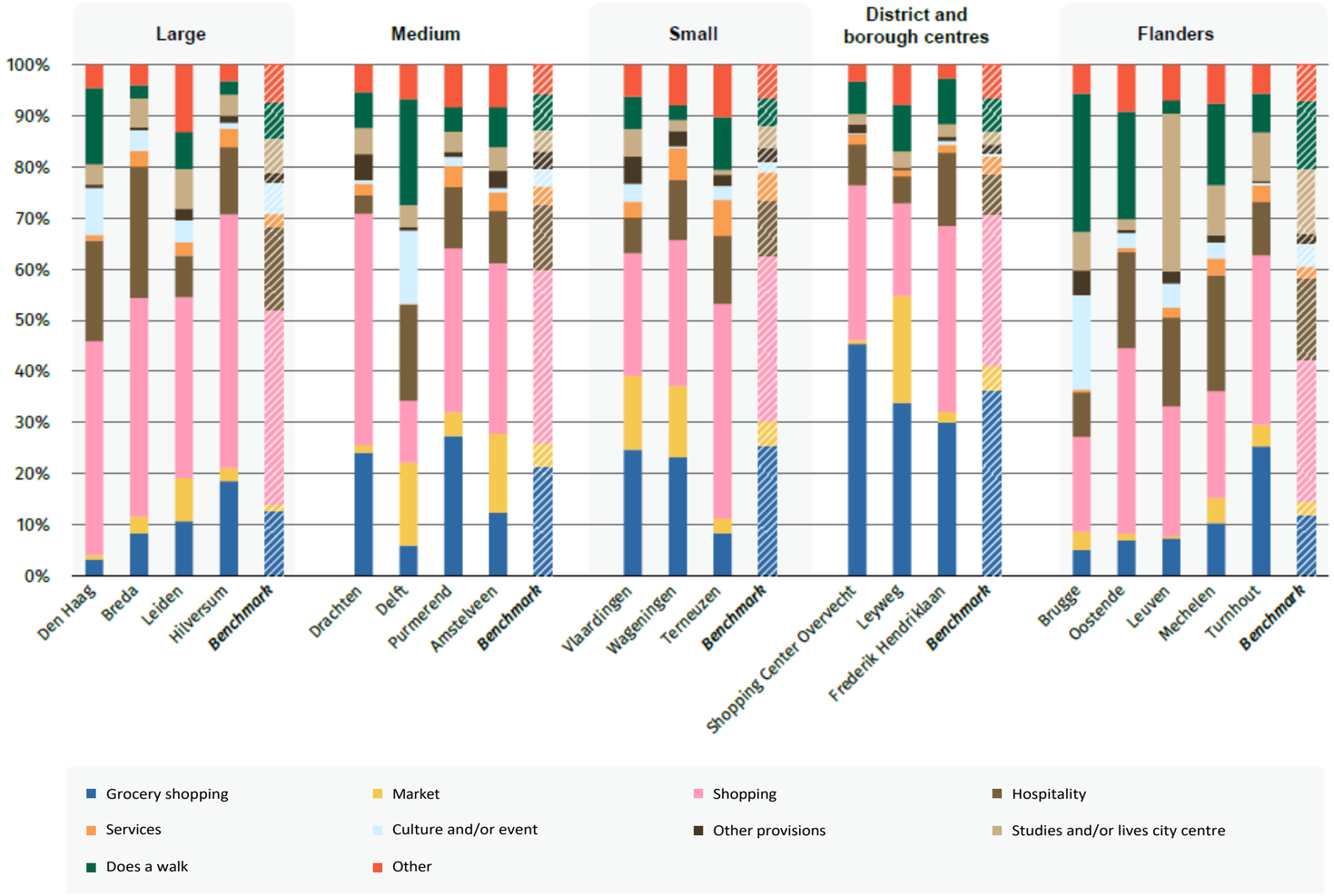
(Recreational) shopping is by far the most important visit motive for large inner cities. This is also related to supply. The larger the city centre, the greater the diversity of visiting motives. In The Hague and Breda, people visit a lot of catering establishments in addition to stores. Hilversum stands out because 50% of the respondents indicated that they do recreational shopping. This is the most compared to all other centres.

Medium and small centres: shopping with a plus

Medium and small centres are highly frequented for groceries with a plus. By this we mean visits to non-daily stores that are often an extension of daily shopping, such as Hema, Action, Zeeman and Wibra. The hospitality industry is also regularly mentioned here, which underlines the fact that the hospitality industry also has a right to exist at a lower level in the supply structure. Delft stands out because of the strong diversity of visiting motives. Many visitors take a walk (without spending money), come for culture and/or an event and visit the hospitality industry.

The historic nature of the city centre contributes to this. Terneuzen has a limited shopping function, but a large (recreational) shopping function. The (weekly) market is often mentioned in Leyweg (21%), Delft (16%), Amstelveen (15%), Vlaardingen (15%) and Wageningen (14%).

Figure 9 **Visit motive**



District and borough centres: especially grocery shopping

Relative to small centres, neighborhood and district centres are visited even more strongly because of shopping. Of all the centres, Shopping Center Overvecht has the most dominant shopping function (39%). Besides shopping (34%), the Leyweg is also visited mainly for the (weekly) market (21%). The Frederik Hendriklaan, besides having a grocery function (30%), also has an attraction for shopping (36%).

Flemish centres: diversity of visitation motives

Unlike Dutch city centre areas, which are still mainly visited for shopping, Flemish city centre areas are visited for many more reasons. Horeca is a much more dominant visiting motive. This also applies to Breda. In addition, there are many more visitors who say they go for a walk, study or live there. These are visitors who create commotion, but do not always spend money. A possible explanation is that more people live/work in Flemish cities than in Dutch centres. Dutch centres are traditionally 'buying machines' for stores and catering. However, the function mix in Dutch centres is shifting in recent years towards less shopping and more living and other activities.

◆ **Mechelen city centre**
Source: City of Mechelen

3.4 Length of stay

Introduction

Length of stay says something about the average number of minutes a visitor spends per visit. The response categories from the questionnaire were calculated to a single average per respondent. The figure per city centre is an average of all (average) dwell times of all respondents. The experience is that people are not very "time conscious" when completing the question. Moreover, some respondents may not have finished their visit. The figures are more indicative.

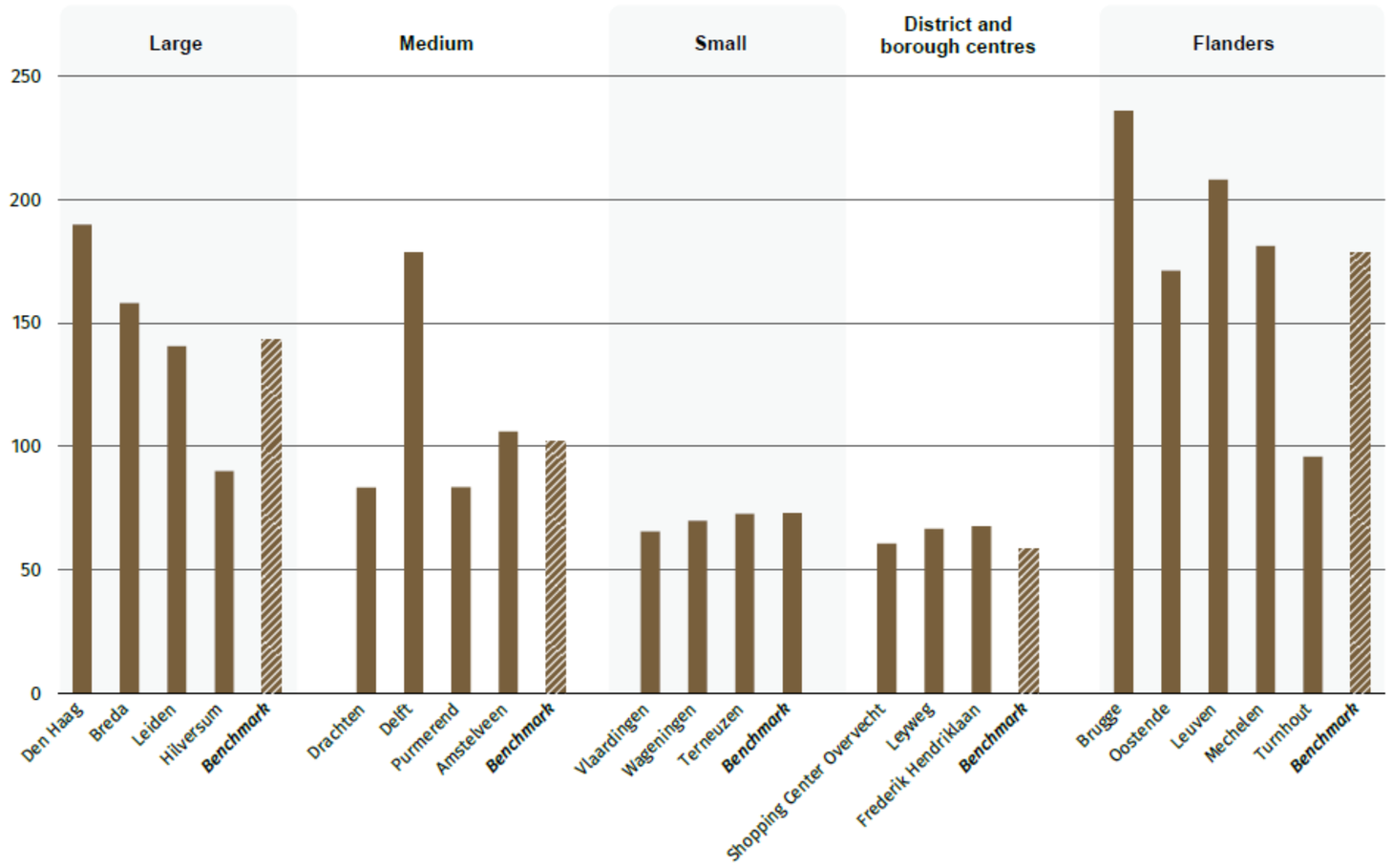
Larger inner cities: longer length of stay

In a general sense, the larger a city centre the longer visitors stay. Logical, because there is also more to do. As a result, the average length of stay in The Hague is over 3 hours on average, while Hilversum is (only) 1.5 hours on average.

Medium and small city centre areas: constant duration of stay

It is striking that visitors to the smallest city centre areas and community centres in this study still spend a fairly long time. In medium-sized centres an average of 1 hour and 40 minutes and in small centres an average of 1 hour and 10 minutes. The explanation is that visitors generally combine stores and/or restaurants and therefore spend at least an hour. Also shopping with combination visits quickly takes an hour. Again, Delft is an outlier with an average of almost 3 hours. Despite the limited size in supply, visitors stay there about as long as larger city centres such as The Hague and Breda.

Figure 10 **Length of stay (in minutes)**



Flemish centres: above-average length of stay

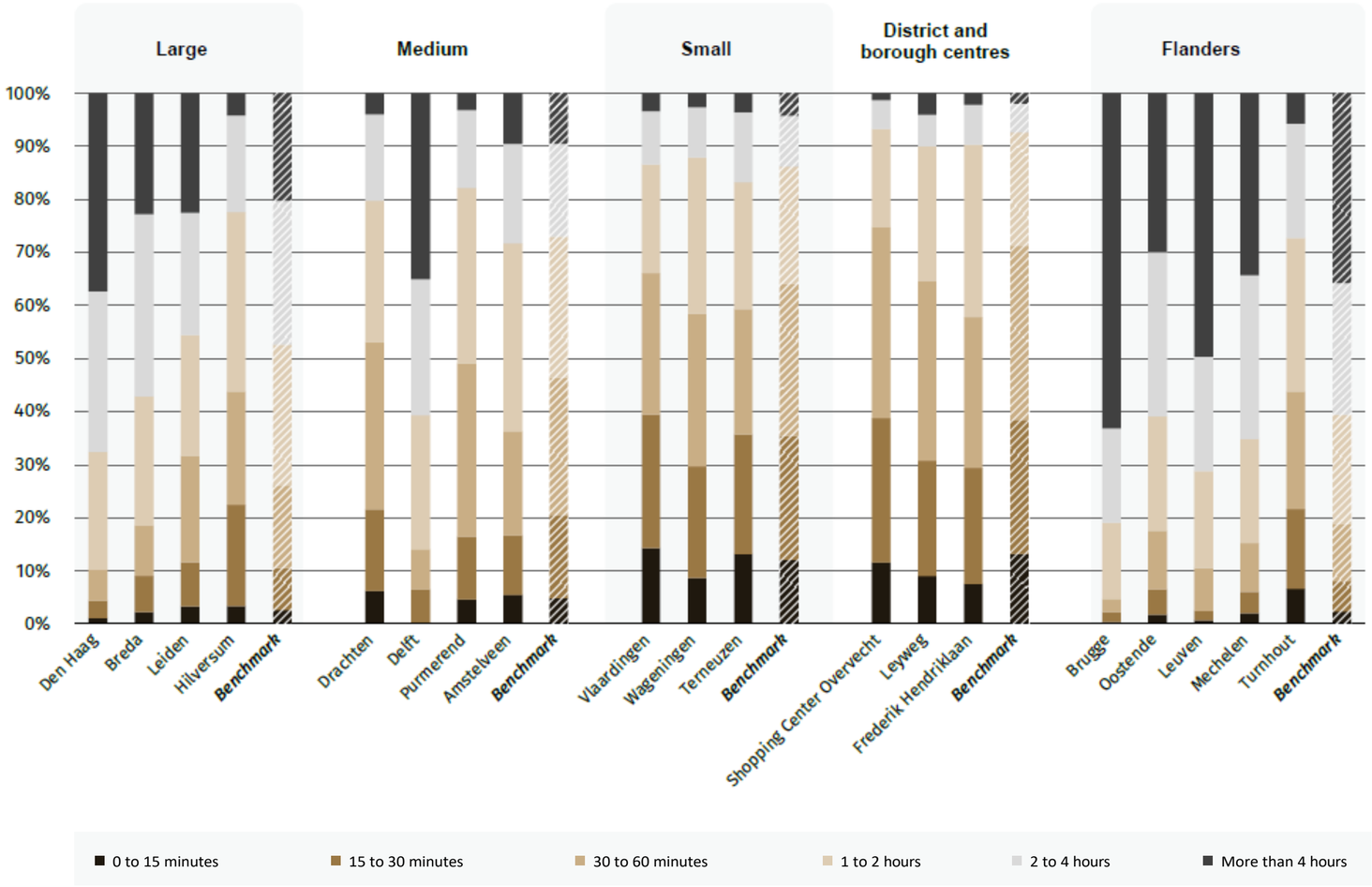
Visitors stay relatively long on average in Flemish centres compared to Dutch centres. Visitors to Bruges stay the longest of all centres in the study (and all of Holland!), averaging almost 4 hours. The other Flemish centres also perform above average compared to Dutch centres. This is related to more focus on hospitality and other visit motives besides shopping.

Short versus long stay

For parking regimes, insight into dwell time is relevant. The average length of stay (previous page) says something about the general profile of a city centre, but mobility policy requires more precise insight into the distribution of length of stay. The figure on the right shows the distribution of the different lengths of stay. The larger the proportion, the more visits. A number of issues are relevant in a general sense.

- Short visits of up to 15 minutes are often targeted visits at a specific store/business/function. Think about picking up a package, picking up a meal or just quickly buying something specific.
- Visits between 15 and 60 minutes are still mostly targeted visits related to one visit motive, such as grocery shopping. Think about visiting a supermarket, with one or two fresh food stores next to it.
- Visits longer than 60 minutes are usually visits that focus on recreational shopping. Store in, store out. Most combinations are then made. All visits longer than one hour are usually combined with catering and other amenities. These may also be respondents who stay in the city centre because of work, study or because they live there.

Figure 11 **Length of stay (distribution)**



3.5 Frequency of visits

Introduction

Visit frequency says something about "how often" visitors visit the city centre. The number is an average based on all respondents, expressed in number of visits per month. This takes into account both occasional visitors and frequent visitors. In short, the calculation is based solely on the 'usually' question. This is more complete than the 'September' question.

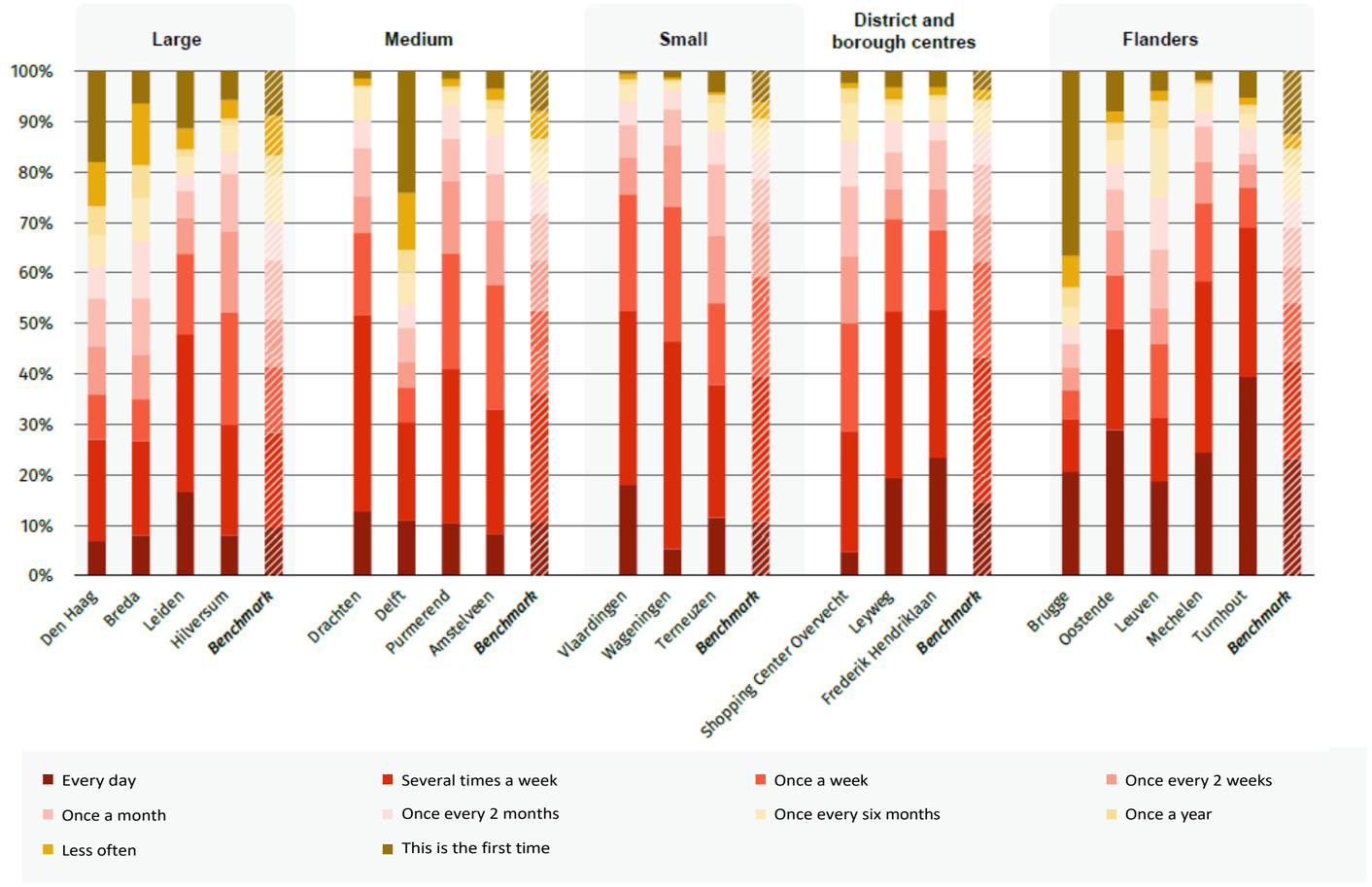
Larger inner cities: more occasional visits

In general, the larger an inner city is, the lower the frequency of visits. This is related to the supply, the nature of the visiting motive and the willingness to travel further. Logically, therefore, The Hague has a low average visit frequency of 3.7 visits per month. Visitors to Leiden visit remarkably often, namely 6.7 times per month. This is related to provenance. Visitors from nearby come (much) more often than visitors from further away.

Medium and small centres: more frequent and regular visits

Depending on the service function, supply and nature of the visiting motive, visitors to medium and small centres visit more often. Delft and Amstelveen measure up to the large inner cities in terms of frequency of visits. For Delft, the explanation lies in the provenance (many visitors from further away). For Amstelveen, it lies in the type of offerings (many non-daily stores that are not all frequently needed).

Figure 12 **Frequency of visits**



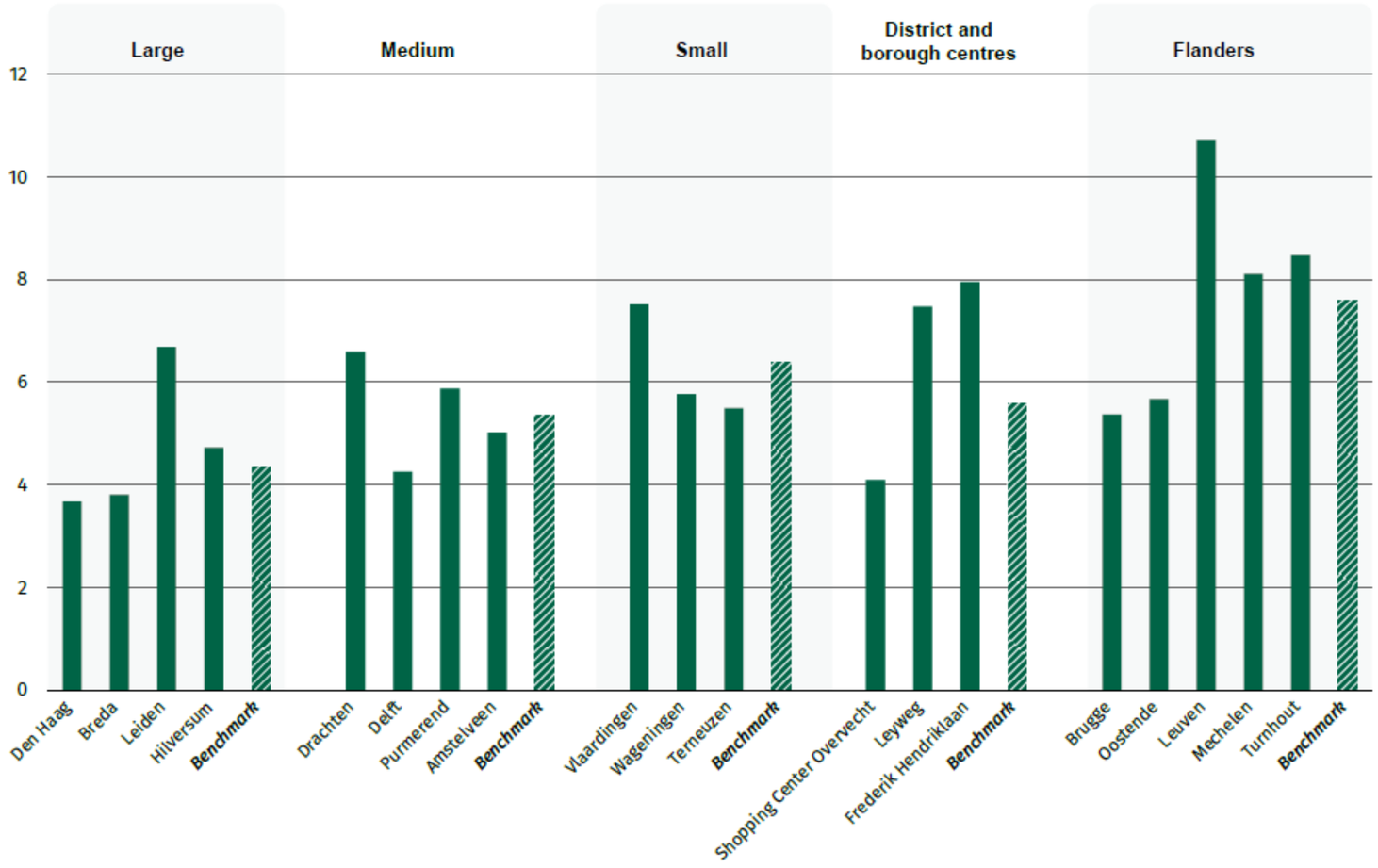
District and borough centres: even more frequent visits

Where grocery shopping is the dominant visit motive, visit frequency is the highest. Logical, since groceries are frequently needed purchases. Frederik Hendriklaan has the highest visit frequency, with an average of 7.9 visits per month. Shopping Center Overvecht, despite its important shopping profile, also manages to attract relatively many occasional visits because of specific attractions. The visit frequency is relatively low for a district city centre with 4.1 visits per month.

Flemish centres: are remarkably frequented

Compared to Dutch centres, Flemish centres are visited remarkably often. This is related to the broader visitation motives and offerings. The hospitality industry is more frequently visited than recreational shopping. Moreover, people visit centres in Flanders for more diverse reasons, which explains a higher frequency of visits. Leuven has the highest visit frequency of all centres, with 10.7 visits per month. This is related to its profile as a student city.

Figure 13 **Average frequency of visits (number of times per month)**



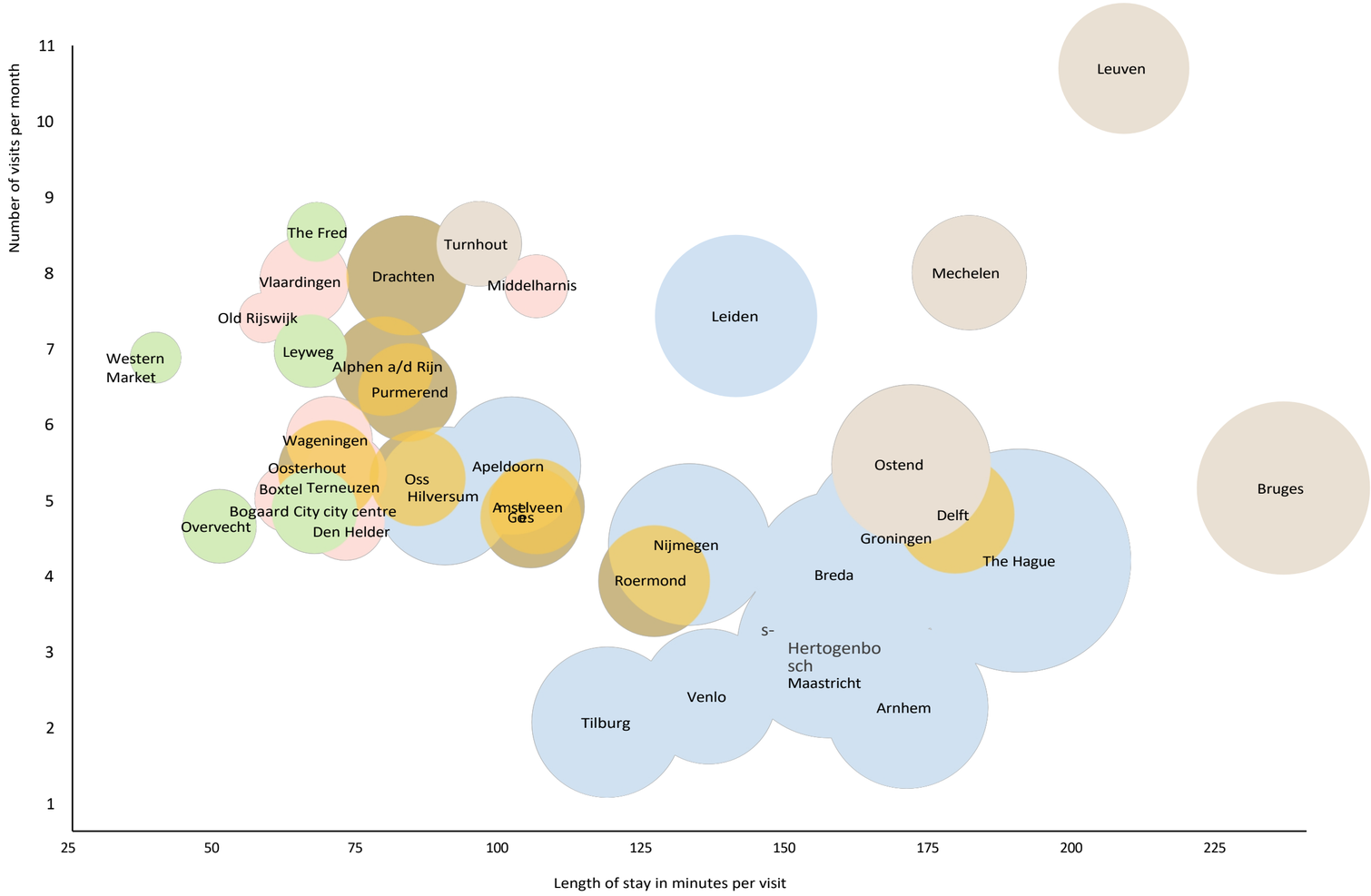
Clear links between indicators

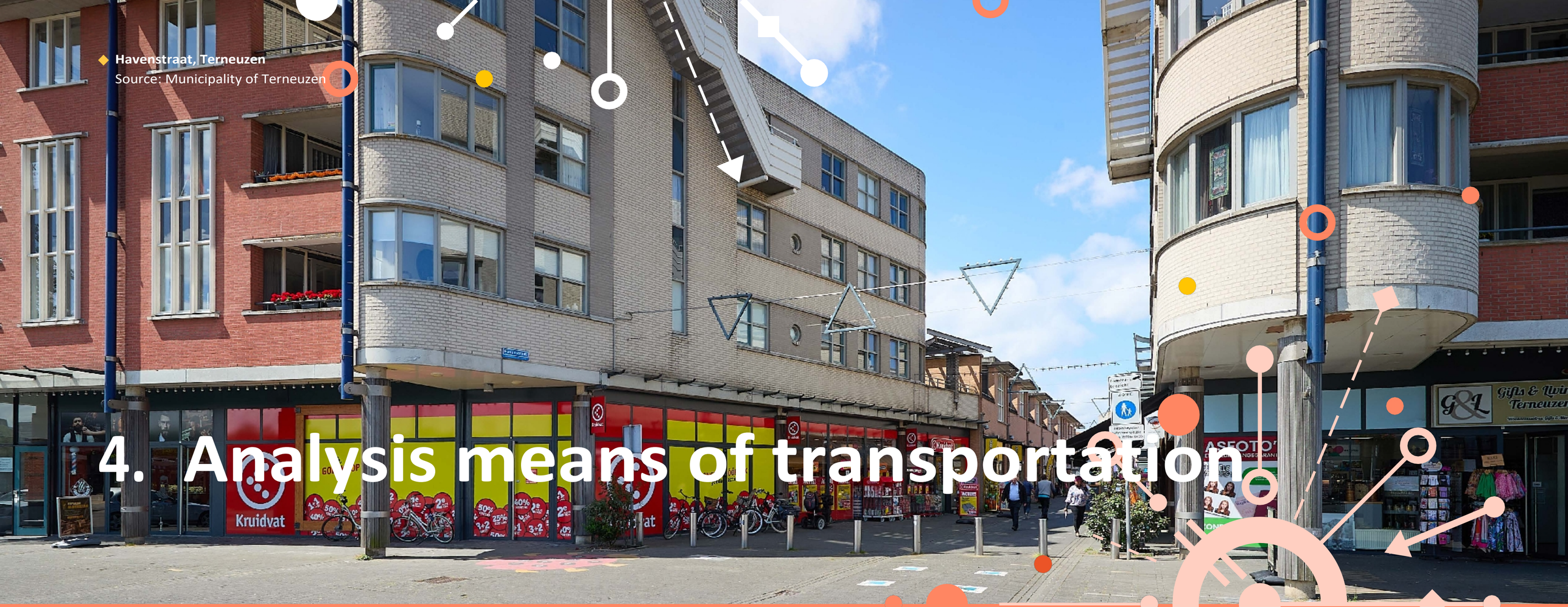
Clear links exist between characteristics of centre-areas, profile and visitor behaviour. Large centres have more mass in supply and therefore a broader function mix. This attracts more visitors from a larger catchment area. People from further away stay longer, spend more, but visit less often. Furthermore, there are clear differences between Dutch and Flemish centres. Flemish centres function much less on stores and more on hospitality and other functions. The visitation motive in Flemish centres is broader.

Relationship residence time and visit frequency

The figure to the right shows all participating city centre areas from 2023 and 2024 based on spending time (on the x-axis) and visit frequency (y-axis). The sphere size indicates the total size of the city centre again. The colour corresponds to the benchmark group. Delft and Roermond are medium-sized city centre areas, but have a similar profile to large inner cities. Hilversum and Apeldoorn are large inner cities, but function on visitation behaviour that suits medium-sized city centre areas. Leiden is a large city city centre with a long length of stay, but also with a remarkably high frequency of visits. The small centres and district and city sub-centres are mostly comparable in terms of length of stay. The visit frequency is related to supply and visit motive. For daily shopping the visit frequency is higher than for less frequently needed purchases. Bruges has the longest dwell time, while Leuven and Mechelen score both a long dwell time and high visit frequency.

Figure 14 **Relationship between length of stay and frequency of visits**





Havenstraat, Terneuzen
Source: Municipality of Terneuzen

4. Analysis means of transportation

This chapter contains all the conclusions and analysis related to the means of transportation. By what means of transportation do visitors come? Why do they choose this mode of transportation?How is this related to provenance, visit frequency, length of stay and visit motive? How does the parking regime affect mode choice?

4.1 Means of transportation

Introduction

This section shows the "flat" distribution based on the sample with respect to the mode of transportation used.
For readability, only the main means of transportation are shown. Other means of transport are combined under the category 'other'. In the in-depth reports for each city centre, we look more specifically at the 'other' category and the visitors who combine means of transport for one visit (multimodal). The 'combinations' category is also an aggregation of different multimodal trips.

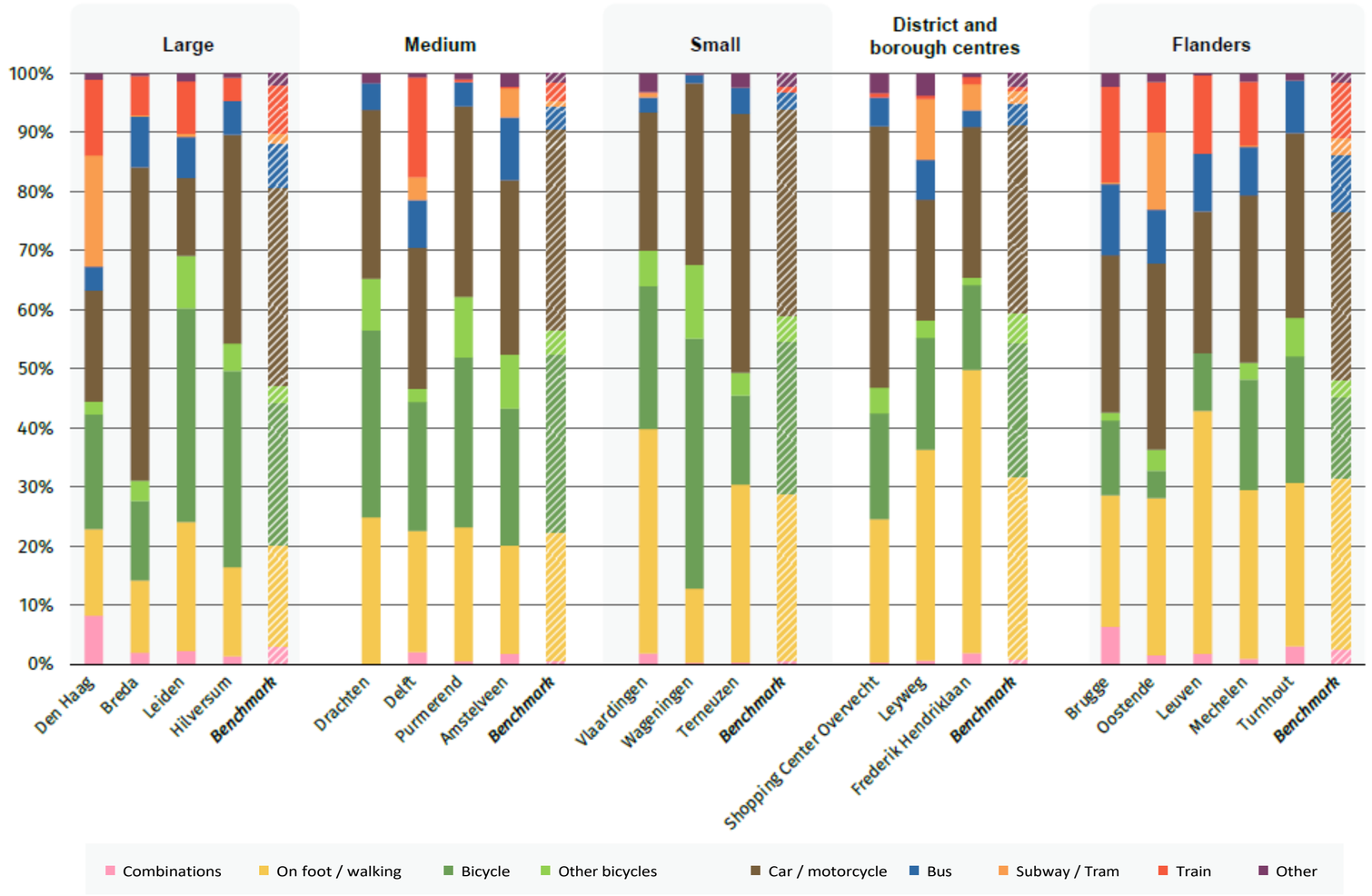
Few multimodal combinations

Visitors use remarkably few combinations. Only in the really big city centres, such as The Hague and Bruges, is this the case.
Usually the combination of car and public transport is mentioned (P+R).

Remarkably much on foot and bicycle

The smaller the catchment area, the higher the proportion of people who walk to the city centre from home (or vacation address). Of all the centres, Frederik Hendriklaan manages to attract the most pedestrians (48%), followed by Vlaardingen (38%) and Turnhout (37%). Most of the visitors live in the immediate area. Bicycles, electric bicycles, and other two-wheelers are important in all centres. The centres that attract the most visitors by bicycle are: Wageningen (55%), Leiden (45%), Drachten (41%), and Purmerend (39%). It is striking that, despite the large catchment area of several large inner cities, the share of cycling is still relatively high. Furthermore, the bicycle is clearly less important in Flemish centres. People choose the bicycle because of the (short) travel time/distance as well as because it is healthy. Various other considerations also play a role, as shown in the figure on the next page. For pedestrians, travel time/distance and health are even more important motives. Parking costs are sometimes mentioned, but are less important overall.

Figure 15 **Means of transportation**



Some centres still run mostly on the car

Visitors who come by car are the main modality. Breda stands out with 53% car visitors. Visitors to Shopping Center Overvecht also often come by car (48%). There is no relationship between modality and city centre size. People mainly choose the car because of the (long) travel time/distance. Visitors from further away therefore come relatively more often by car. The argument of 'easy to carry purchases' is also an important reason to take the car. Think of the weekly (large) groceries. In some situations there are also no better alternatives, for example if the distance is substantial.

Importance of public transportation varies widely by city centre

The availability and accessibility of public transportation varies greatly by city centre. City centre The Hague manages to attract the most visitors via public transportation. Metro/tram accounts for 19% of visitors and train for 13%. A more or less similar picture is seen in Ostend (metro/tram 14%, train 9%) and Delft (mainly train 17%). Bus has a more or less limited share in all centres, with only 1% in Wageningen and 11% in Amstelveen. Similar to the other means of transport, public transport is also used mainly because of travel time/distance. It is striking that many respondents indicate that they choose public transport because there are no better alternatives. These include people who travel far who do not have a car or are less mobile. Thus, despite the limited number of visitors in total, the dependency on public transport for this target group is high.

Figure 16 **Reason car**

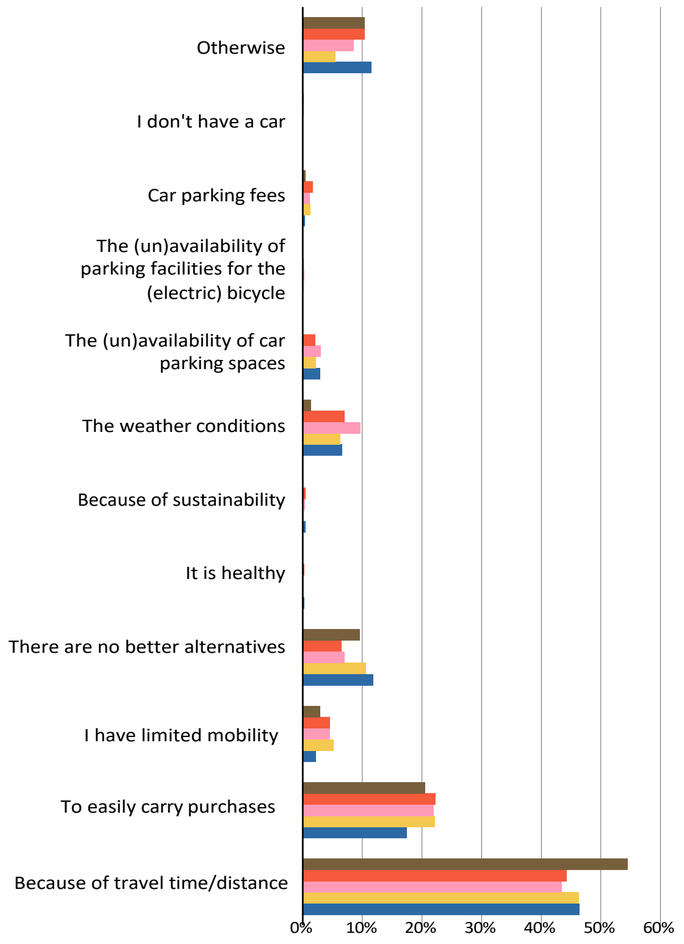
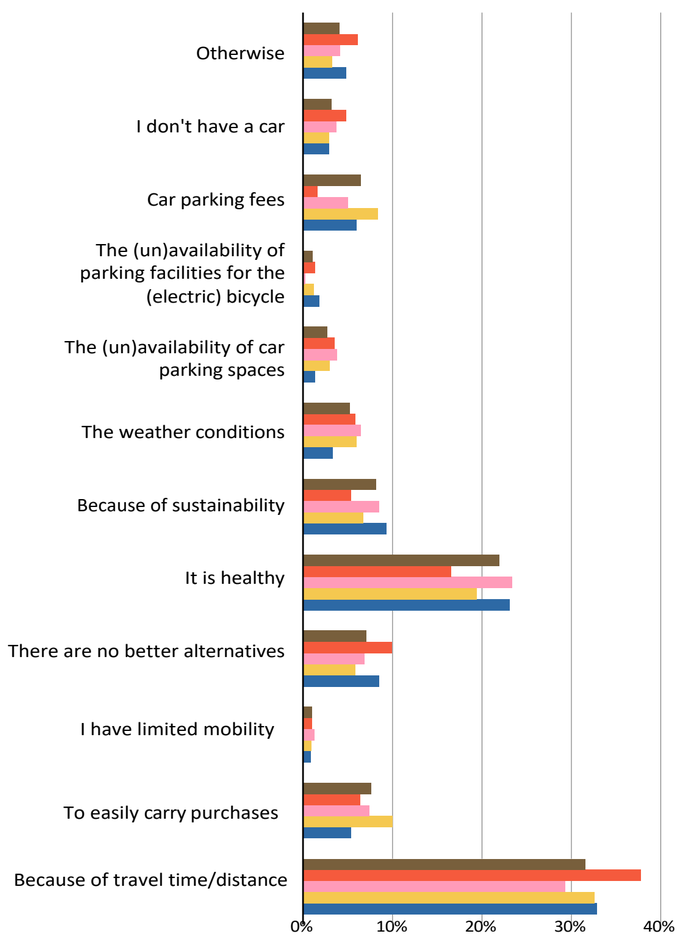
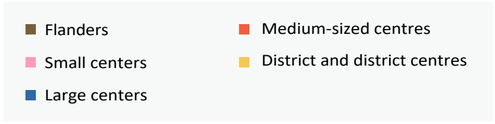


Figure 17 **Reason bicycle**





4.2 Means of transportation - loyalty

Introduction

This section looked at how loyal people are to one particular mode of transportation. It was asked whether people always choose the same means of transportation or change it. In short, people always take the same mode of transportation when making repeat visits, or they sometimes choose a different mode of transportation for certain reasons. The average was calculated for the centres that participated in 2024. Justification was also asked. The loyalty percentage is the average of all people who answered "no" to the question whether they sometimes switch their means of transportation. The higher the percentage, the more loyal people are to one specific mode of transportation.

Loyalty in general high

In a general sense, visitors to city centre areas tend to take the same mode of transportation. Of all the visits people make to city centre areas, they are predominantly loyal to one mode of transportation. The distance / travel time is decisive and that means that there are usually no logical alternative means of transport. Habit also plays a role. If one always travels to the city centre by one means of transport, one tends to choose this automatically the next time one visits the same city centre. This is easy and stems from "reducing mental strain".

Who sometimes chooses alternative transportation? And why?

Pedestrians and cyclists are a lot more loyal to the form of mobility than visitors who come by car, because alternatives are often not logical/ better to reduce travel time. Car visitors tend to have more access to alternative modes of transportation such as a bicycle allowing them to switch more. The bad weather (or weather forecast) and/or because they need to carry a lot of stuff is then often a reason to switch between modes of transportation.

Figure 18 **Reason on foot**

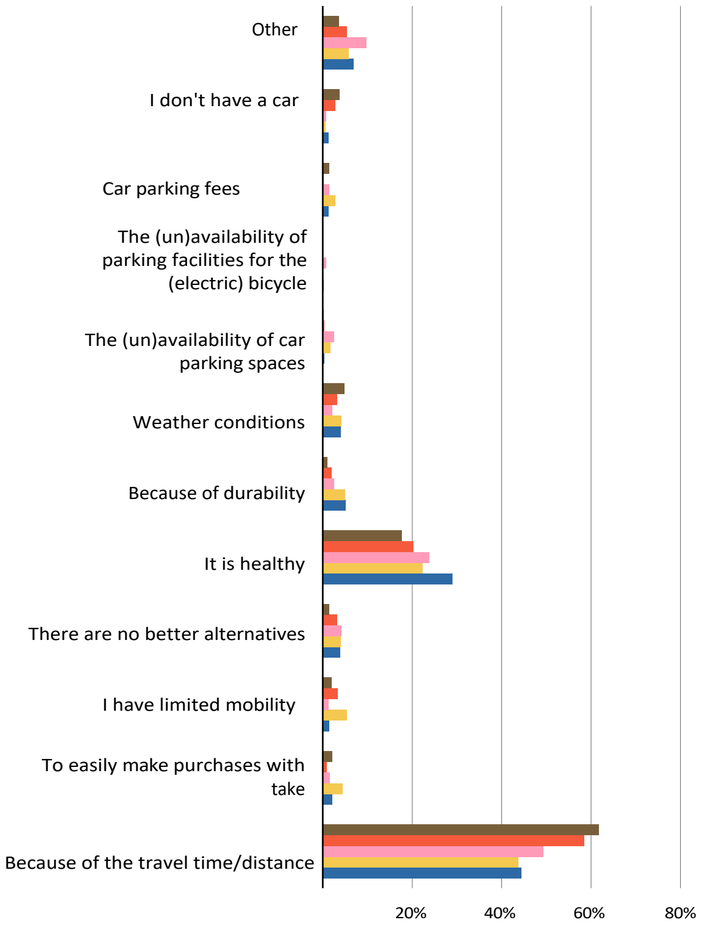
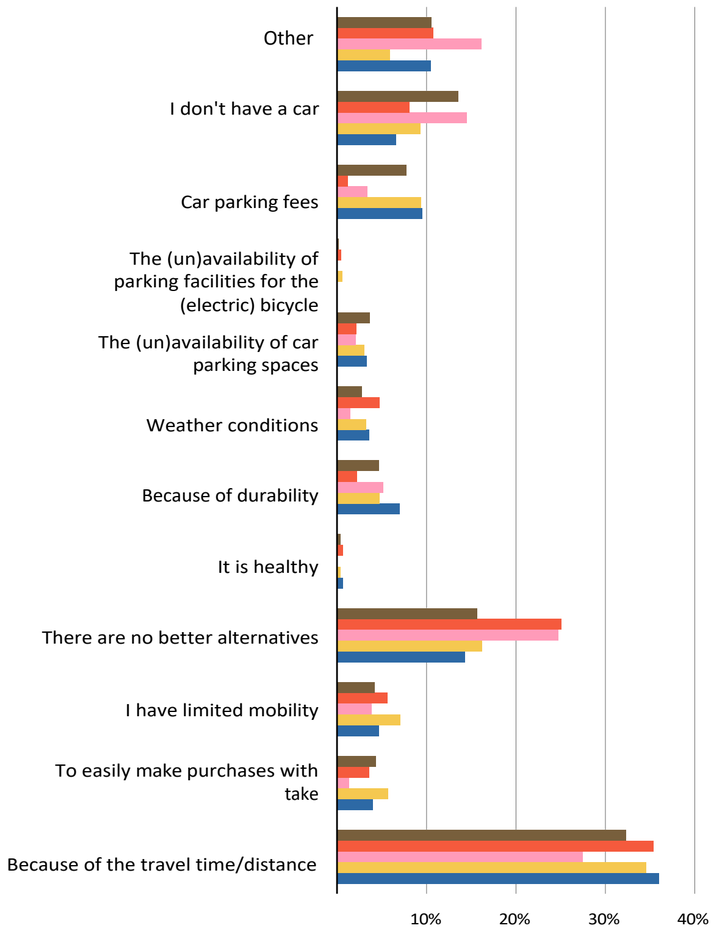
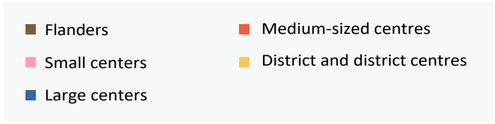


Figure 19 **Reason public transport**





Why do visitors switch modes of transportation?

1. **Weather conditions.** In bad weather, such as rain, snow or extreme heat, people often choose a mode of transportation that offers protection. Also vice versa, when the weather is nice, people switch modes of transportation more often.

2. **Quantity of groceries.** When carrying larger groceries, it is more often still chosen to switch modes of transportation.

3. **Time.** People often choose the mode of transportation that will get them to their destination the fastest. For example, this may be the car rather than public transportation, especially if the travel time is significantly shorter.

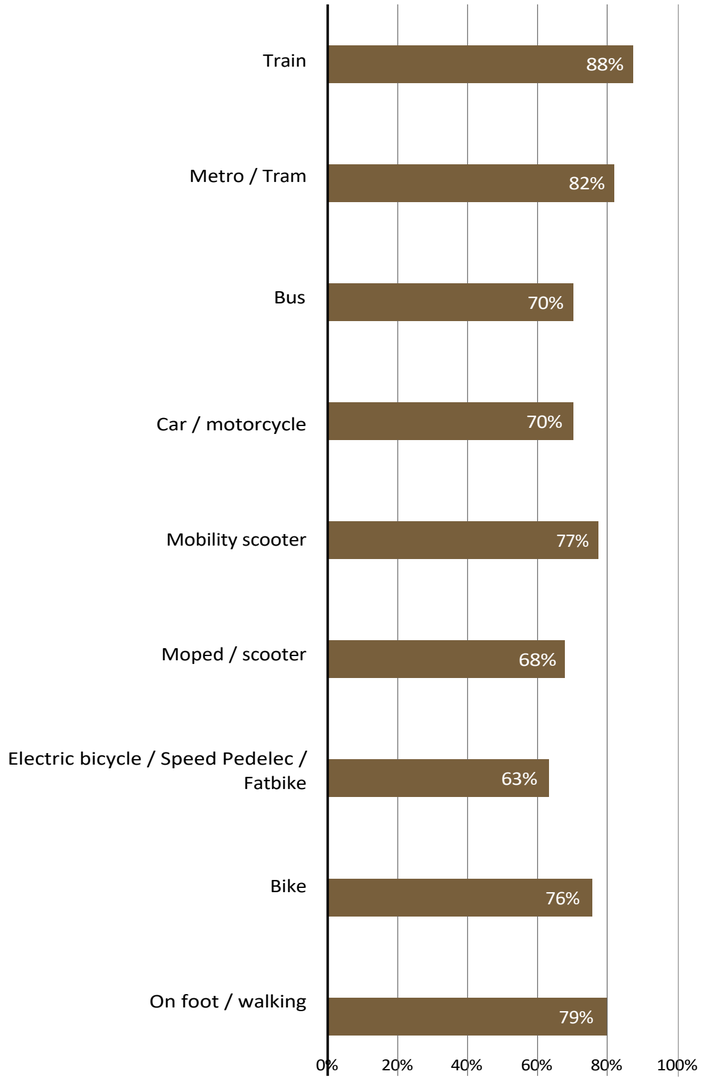
4. **Health and physical condition.** For short distances, people are more likely to choose walking or cycling to get their daily exercise. This is less feasible for long distances.

5. **Convenience.** Convenience is a reason often mentioned. People's personal situation also plays a role here.

6. **Distance.** When the travel distance increases, it can be seen that more often a different choice of transportation is made.

7. **Companionship.** If you are traveling with several people, a car can be more comfortable / be more economical than, say, a bicycle or public.

Figure 20 **Loyalty to means of transportation**



4.3 Means of transport - length of stay and frequency

Introduction

This section calculates the average length of stay by means of transport, based on all 37 city centre areas. As well as the visit frequency.

Relationship of transportation mode and length of stay

There is a clear relationship between mode of transportation and length of stay. It is related to travel time. Visitors who come to a city centre on foot or by bicycle stay much less time than visitors coming by car and public transportation. The same relationship applies to travel time. The longer a person travels from provenance to destination, the longer a person stays. Logical, because if you have to make more of an effort to get somewhere, as there is likely to be a higher attraction value, you tend to stay longer.

Relationship transportation mode and visit frequency

There is also a clear relationship between mode of transportation and frequency of visitation relationship. Visitors who come on foot or by bicycle are much more likely to come frequently than visitors who come by car or public transportation. This again correlates with provenance, as provenance strongly influences transportation choice.

Figure 21 **Average length of stay (in minutes) per visit by mode of transportation**

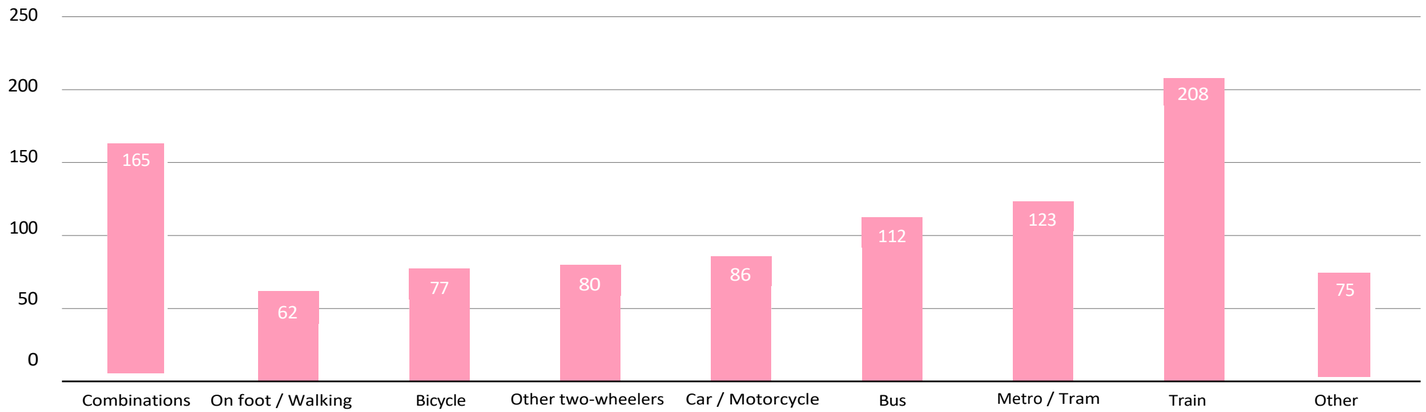
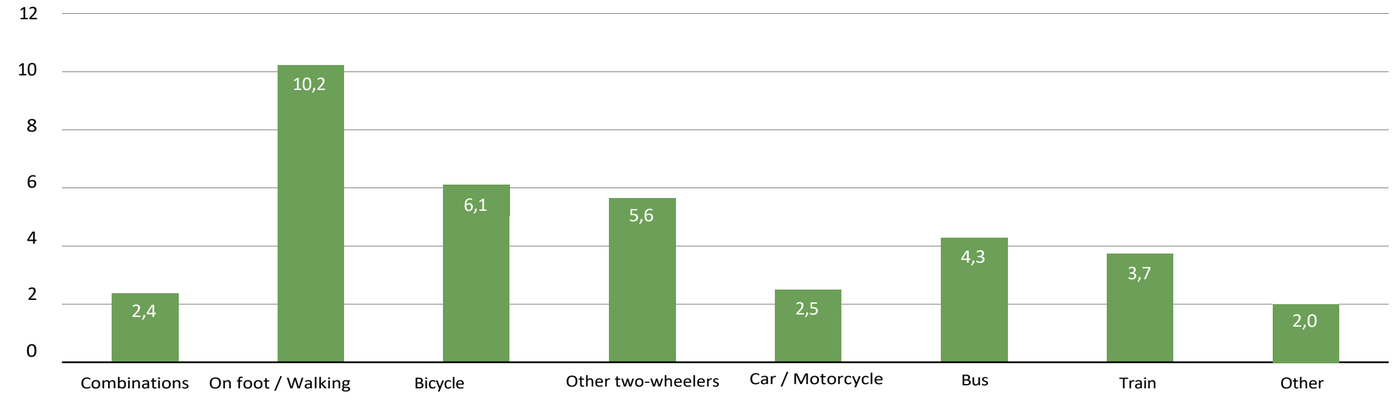


Figure 22 **Average frequency of visits per month by mode of transportation**



4.4 Travel Time Analysis

Introduction

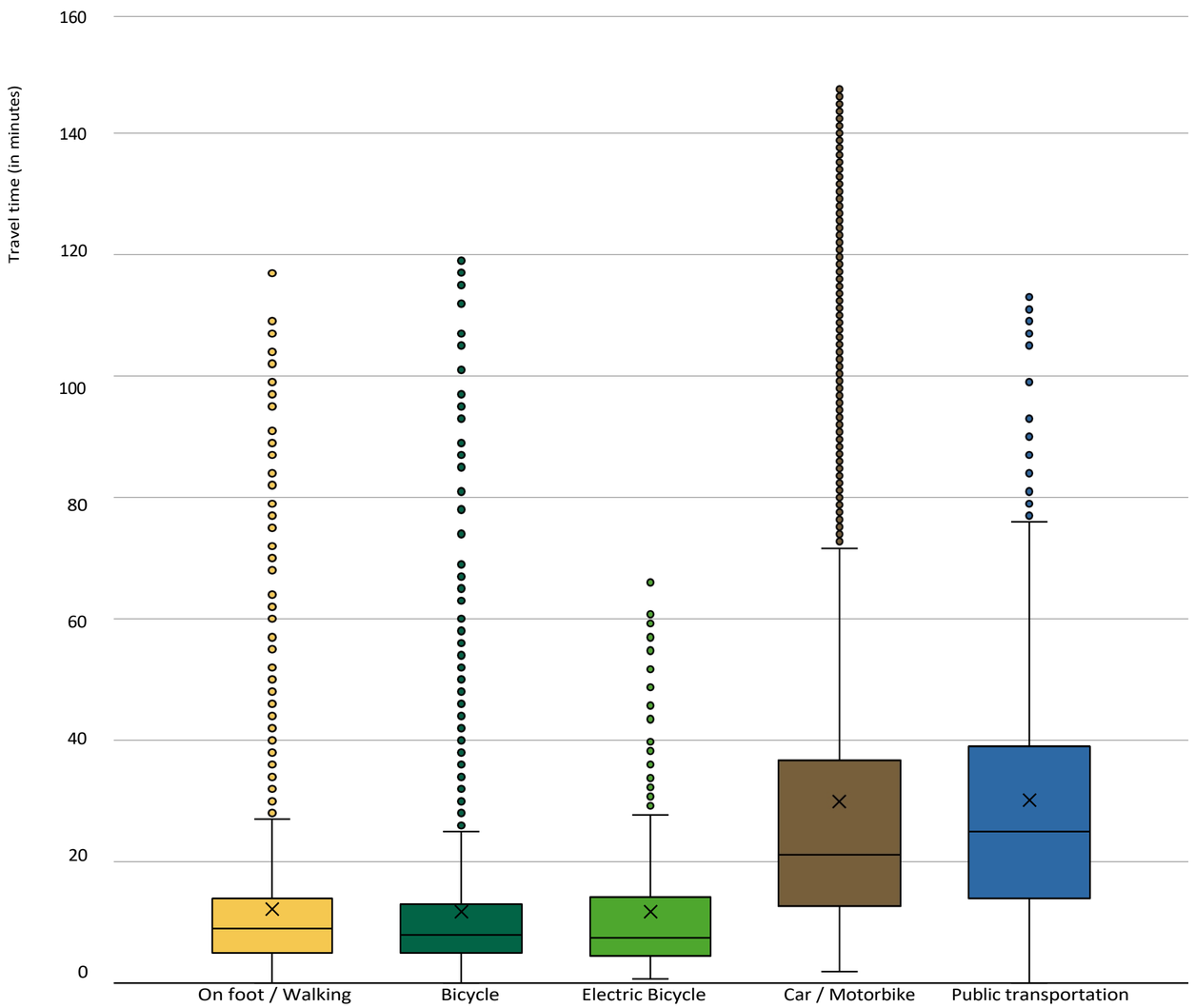
In this section, visitor travel times are shown on provenance-destination relationship. This has been done using the Movares Accessibility Model. This accessibility model uses 'open data', such as the OpenStreetMap
(OSM), public transport data (so-called GTFS bundles) and data from the National Road Traffic Data Portal (NDW). By these data, the Verbindingswijzer can be used to determine the travel time from any point in the Netherlands within which you reach your destination. We determine this for all forms of travel: on foot, by bicycle, electric bicycle, car or public transport or with combinations of these. In the analysis is for travel by car accounted for (general indices) parking time and delay time for cars, while for travel by public transport, bicycles have been assumed as pre-transport and walking as post-transport. Travelers from abroad with travel times longer than 120 minutes have not been taken into account. Visitors from Belgium and Germany (within 120 minutes travel time) to Dutch shopping city centre areas are included.

Travel times are presented in boxplots. The "box" represents the middle 50% of the observations, with the bottom dash the minimum and the top dash the maximum. The dash in the cube is the median, the midpoint of all observations. The cross is the mean of all observations. Individual observations above the maximum are outliers. The analysis is based on all Dutch city centre areas from 2023 and 2024.

Longest travel time by public transportation and car

In general, visitors who come by public transport or car travel longer than visitors who come by bicycle or on foot. This is also logical, because car and public transport can cover larger distances more quickly, which may be too far by bike or on foot for most visitors. The spread in travel time is also lower among visitors who come by bicycle or on foot. Half of these visitors travel between

Figure 23 **Travel time by mode of transportation**

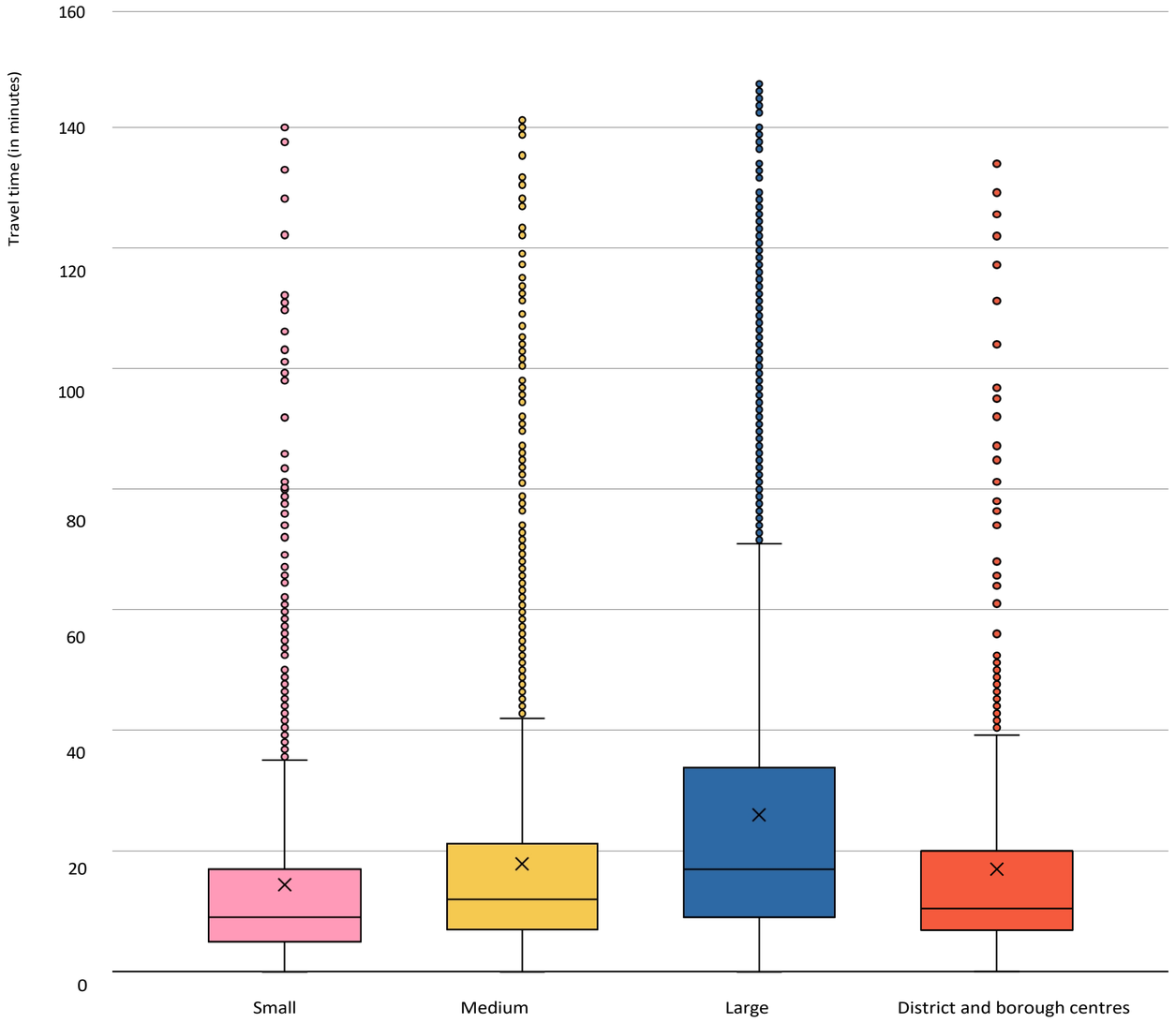


5-14 minutes (walking), 5-13 minutes (bicycle) and 5-14 minutes (electric bicycle). Thus, the travel time for these three active forms of mobility is almost the same, averaging 12 minutes. However, the distance is logically different. Within the same travel time, a (electric) cyclist can travel a greater distance than a pedestrian. Half of the car travelers travel between 13-37 minutes and by public transport between 14-39 minutes. This amounts to an average of about 30 minutes.

The larger the city centre area, the longer one travels

The larger the city centre area in terms of amenities, the longer people are willing to travel. This is logical since a larger city centre offers more amenities and thus attracts people who come from further away and thus travel longer. These visitors, for example, do not have the relevant facilities (all) nearby. The large inner cities therefore also have more variation in travel times, because the service function is also related to the location of other large and medium city centre areas in the region. Some city centre areas have a large hinterland with few competitors, other city centre areas have to compete with other (large) city centre areas at a close distance. The bulk of visitors to a large city centre travel between 9-34 minutes, an average of 26 minutes. The maximum, excluding outliers, rises to 72 minutes. Among the other centres, the travel time here is between 5-17 minutes (small), 7-18 minutes (medium) and 7 and 17 minutes (neighbourhood and district centres). The real maximum acceptable travel time here is much lower.

Figure 24 **Travel time by type of city centre**



4.5 Means of transportation - person characteristics

Introduction

Certain person characteristics influence the choice of transportation mode. In this section, different person characteristics are contrasted with transportation mode choice based on all 37 city centre areas. Specifically, for group size, the average was calculated on all respondents, excluding respondents who indicated being with a group of more than 15 people. These outliers were not included in the calculation of the mean.

Group size and household composition of influence

Visitors with family and/or with several people, are more likely to come by car or public transportation. The influence of having a family with children is the strongest influence on this. This also makes sense because it is easier for this target group.
Combinations, such as P+R-type arrangements is also attractive to families and groups. Students or people living at home use other two-wheelers and public transportation relatively often.

Consistency with income

Zooming in on the income level of visitors, it is striking that especially the lower income groups come by bus and bicycle. The higher income groups come by car. This also has to do with the availability of a car. Some lower-income visitors do not have a car, making them dependent on alternative modes of transportation. For longer distances, this is the bus and for shorter distances, walking or biking becomes attractive. Higher income visitors have more transportation mode choices.

Figure 25 **Means of transportation - household composition**

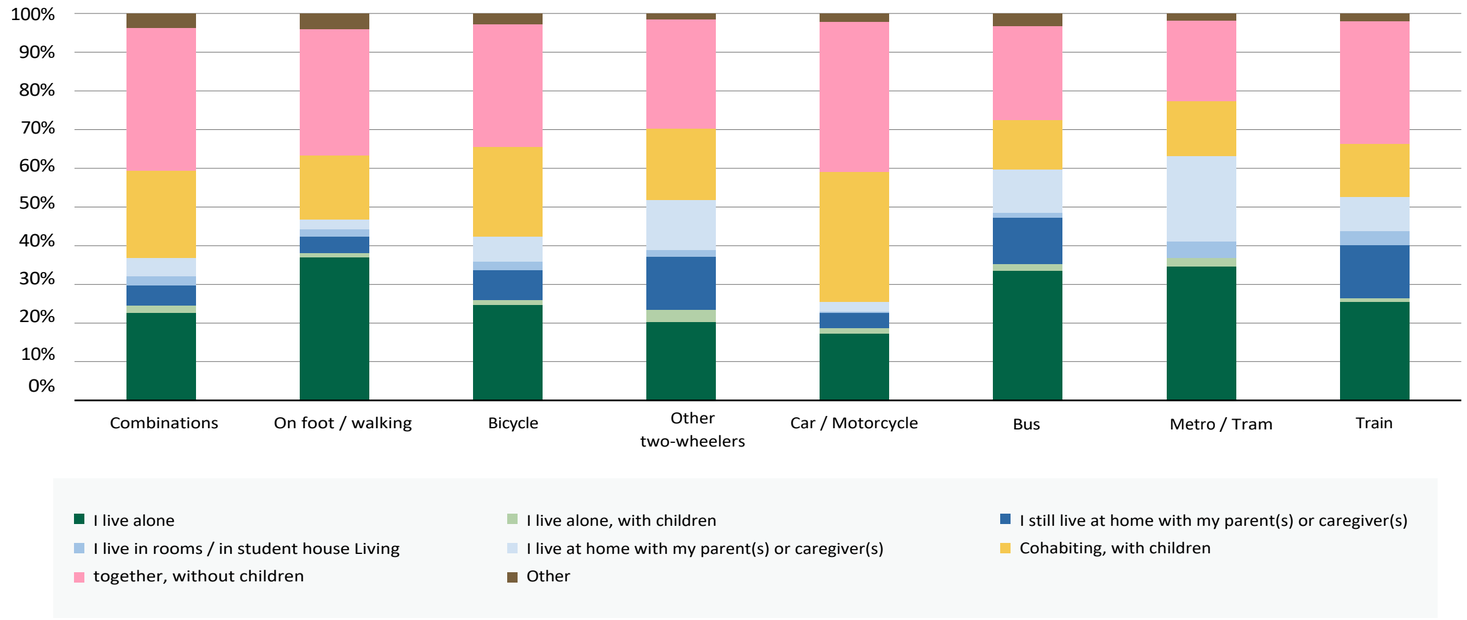
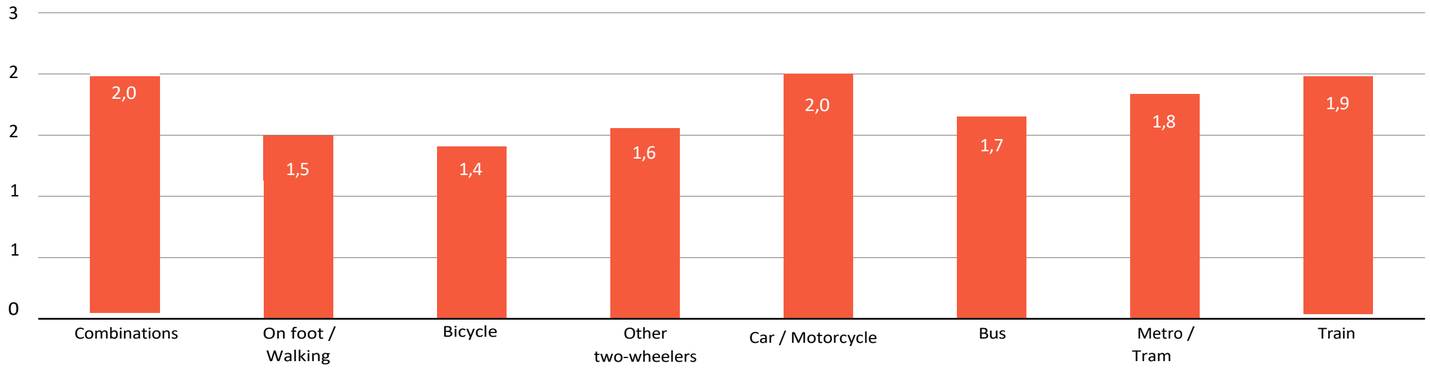


Figure 26 **Means of transportation - average group size (number of people)**



Age is less of a factor in the choice of mode of transportation

There are no major differences in the average age by means of transportation. The biggest difference exists between the young and the old. Young people (up to 30 years old) more often do not have a car and therefore rely on public transportation and bicycles. Those over 66 do a relatively large amount of walking relative to other groups. This underscores the importance of proximity to facilities for this target group. The group 46 to 65 years old relatively often takes the car.

Figure 27 **Means of transportation - income**

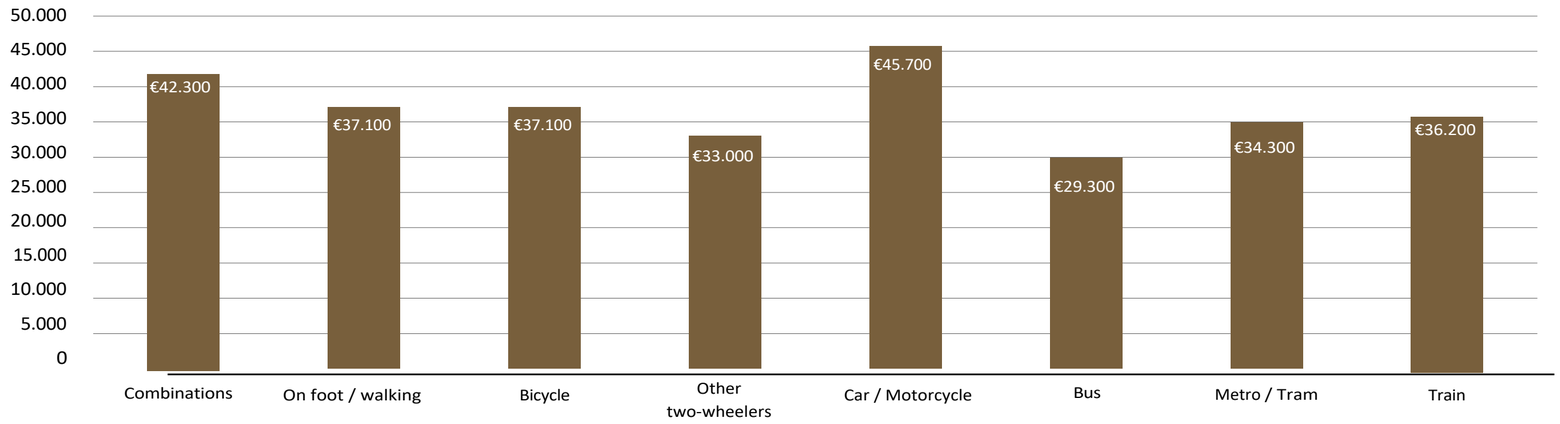
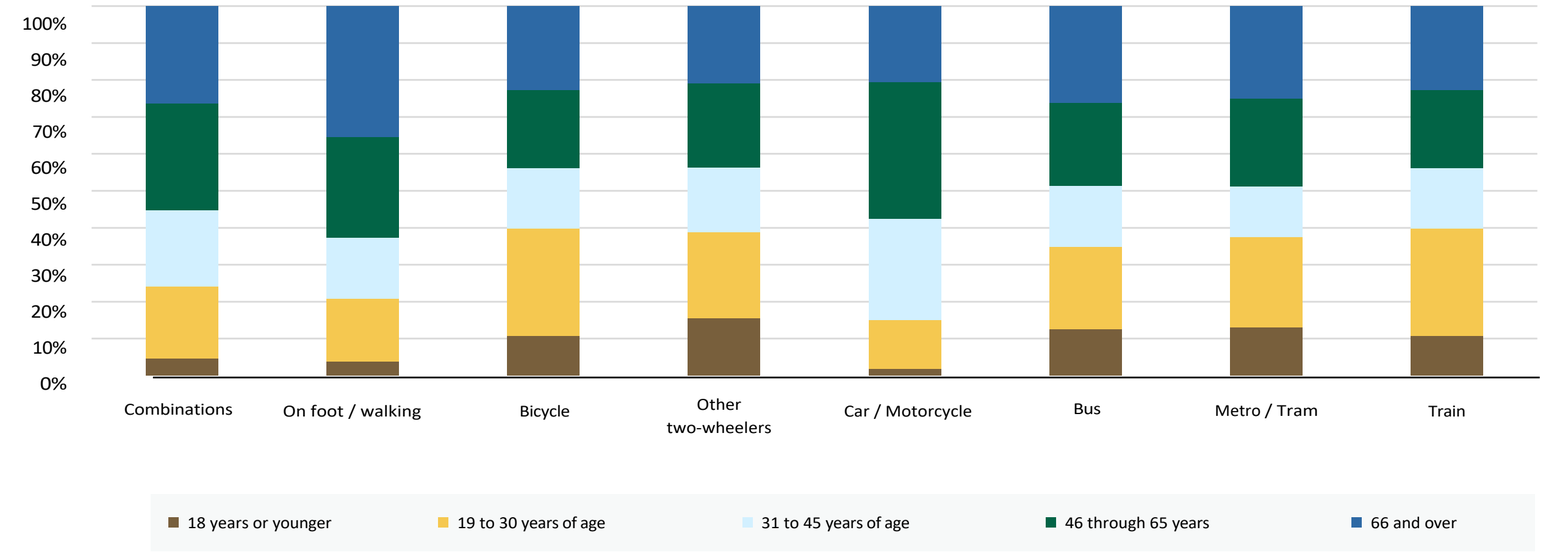


Figure 28 **Means of transportation - age**



◆ **Terraces in Leuven**
Source: City of Leuven

5. Analysis spending

This chapter contains all the conclusions and analysis related to spending. How much do visitors spend per city centre/inner city? Which sectors do these expenditures end up in? How is this related to provenance, frequency of visit, length of stay and motive of visit? How do visitor characteristics relate to spending patterns?

5.1 Spending - total

Introduction

Visitors were asked how much they spent in the city centre today. The amount spent was linked to sector/branche in the questionnaire. It is therefore explicitly not just retail, but also catering, services and other amenities. Average spending is based on spending in all sectors combined, including visitors who spent nothing in the city centre. In short, the average spending per sector (and the total) was also calculated on the number of respondents who spent nothing (in the sector in question) and respondents who only stroll or live/work there.
Note: last year we only looked at the voucher amount (only people who did spend something).

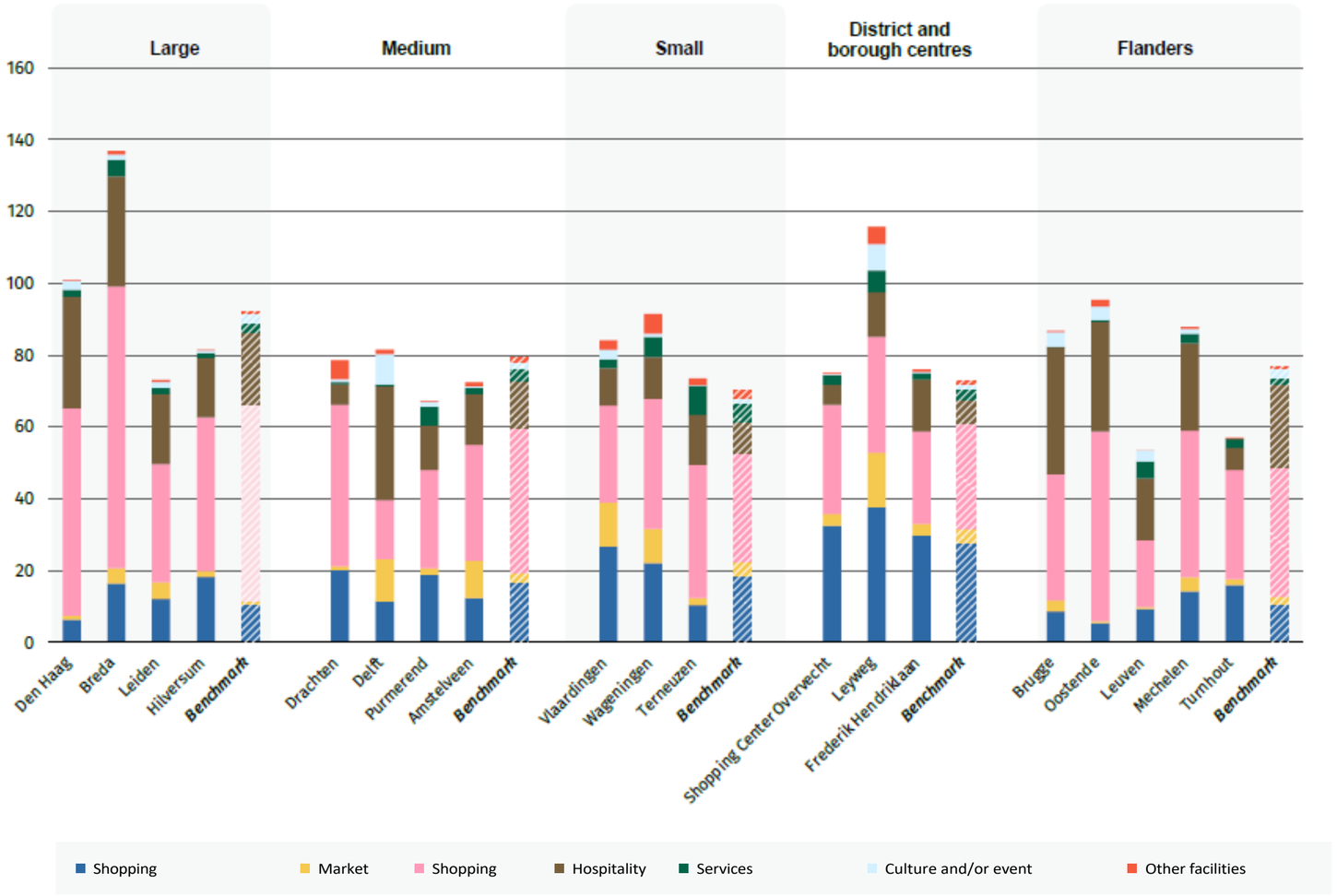
Relationship to visitation motive and supply

Logically, spending goes mainly to the sectors where there is most supply and where visitors mainly come for. The spending in the large city centres consists mainly of (recreational) shopping and catering, while in the smaller centres more spending is done for groceries. Total average spending varies among centres, but there is no correlation with city centre size.

Relationship to provenance and length of stay

Centres that attract proportionately many visitors from further away and where visitors stay for a long time generally manage to attract more spending. Breda is the best example with an average total expenditure of almost € 140 per visit. Relatively many visitors come from further away ánd they stay relatively long. The sphere diagram on the next page also clearly connects the relationship between length of stay and average spending, obviously with a few outliers.

Figure 29 **Average spending per visitor (including non-spenders)**



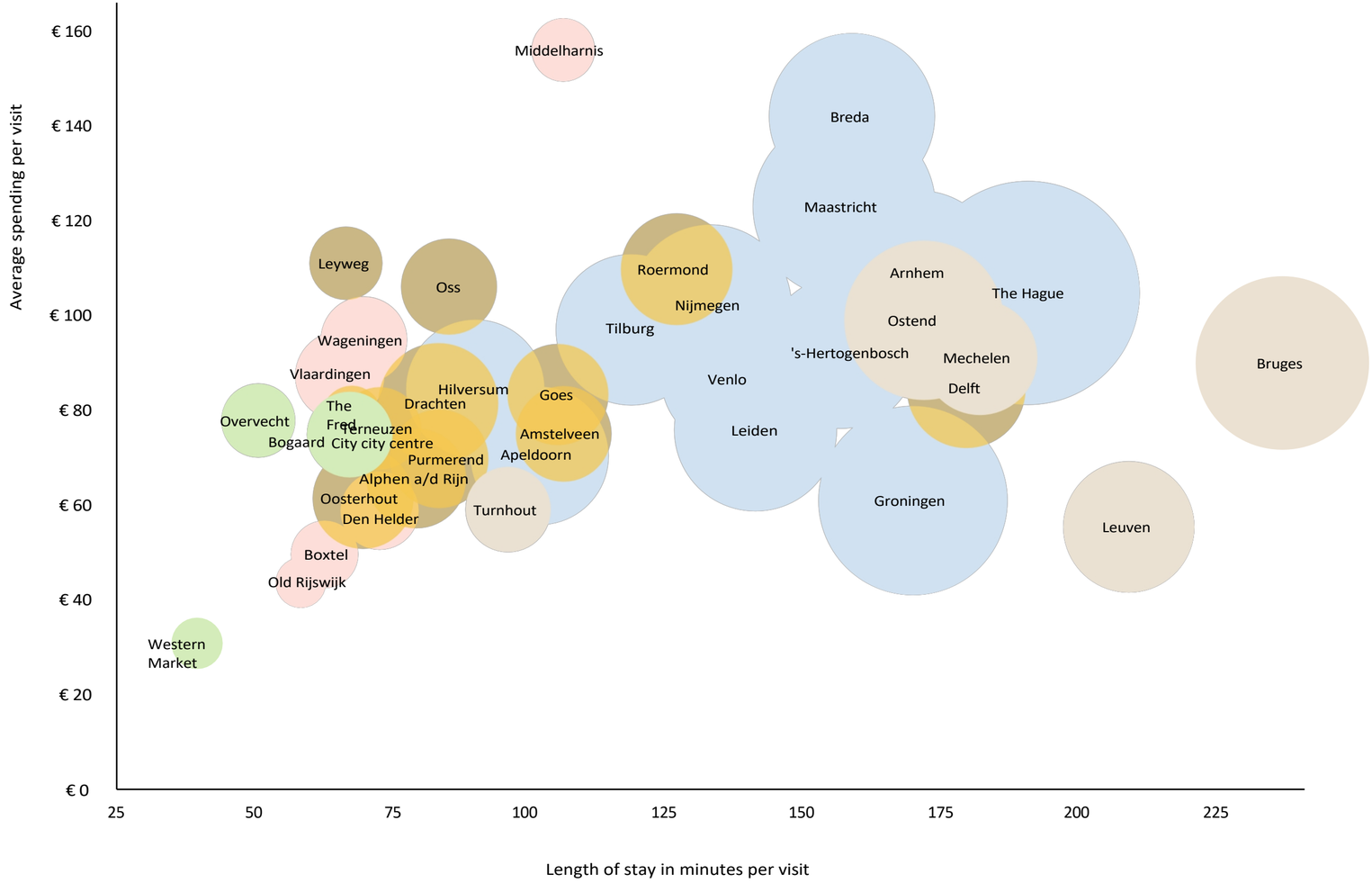
Relationship to purchasing power visitors

Zooming in on the personal characteristics of visitors, it appears that higher-income visitors generally spend more than lower-income visitors. However, this relationship is (much) weaker than the relationship with provenance and visiting motive. People with smaller wallets tend to be somewhat more tied to their own "local" city centre. Centres that attract many visitors with a relatively high income are for example the Leyweg, and the centres of The Hague, Vlaardingen, Wageningen, Delft and Maastricht. Westermarkt and the centres of Hilversum and Drachten attract mostly lower-income visitors. Breda is a good example where the average visitor has a relatively low income (just below average), but where the average spending is high. This is due to the large catchment area (visitors come from far away) and the diverse range of stores and restaurants (also in the higher segment).

Spending levels off after a certain length of stay

There is no unlimited growth in average spending. Despite the fact that some centres, such as Bruges and Leuven, with an above-average length of stay, average spending is not increasing. Thus, there is a kind of "ceiling" on feasible spending. This ceiling is related to the supply profile and the combinations in the functional mix that visitors do per visit. In addition, as indicated earlier, there is also a "lower limit" in both spending and length of stay. In many centres, the average length of stay is more than one hour. This is offset by the necessary spending, which starts from an average of about €40. Only the Westermarkt is an outlier in terms of length of stay and expenditure (smaller community city centre).

Figure 30 **Relationship between length of stay and average spending per visit**



5.2 Spending - frequency of visits

Introduction

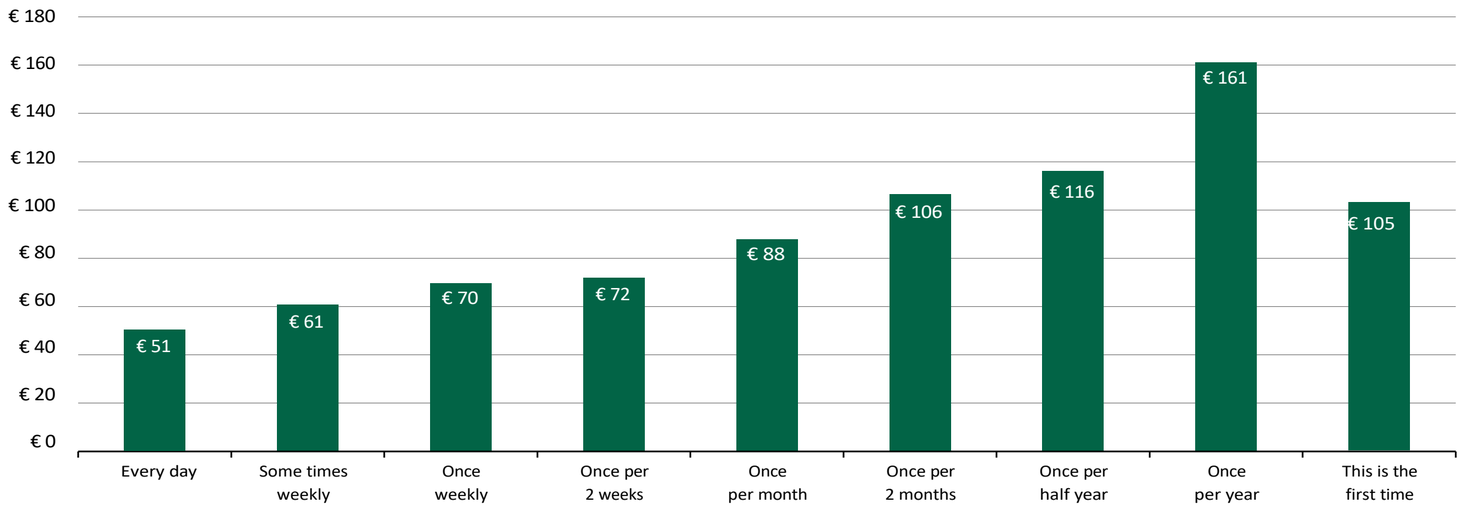
In this section, average spending per visit is contrasted with average visit frequency per month, based on all 37 city centre areas.

The more often one comes, the less they spend per visit

Frequent visitors spend much less per visit than occasional visitors. There is a clear positive correlation. Average spending increases cumulatively to very occasional visitors, namely those who come once a year. Interestingly, however, first-time visitors again spend slightly less, but still comparable to occasional visitors.

Terneuzen
Source: Municipality of Terneuzen

Figure 31 **Average spending - frequency of visits**



5.3 Spending - person characteristics

Introduction

Certain person characteristics affect spending. In this section, different person characteristics are contrasted with spending per visit based on all 37 city centre areas.
Specifically, group size was considered up to 6 people. The number of observations after that is limited.

The larger the group, the more spending

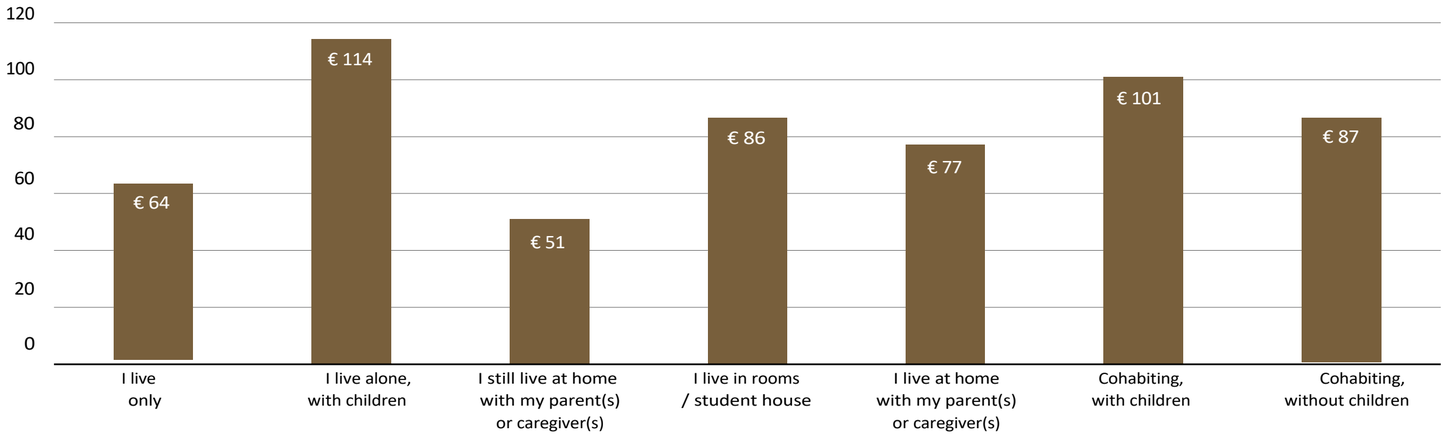
The visitor unit, or group size, affects the amount spent per person. The larger the group, the more is spent per person. However, growth in spending does not increase linearly. Between one and two people, the factor is greatest, then it flattens out. It should be noted that we ask respondents about spending per person. In practice, however, this sometimes gets mixed up because people also make purchases for the whole family. Consider groceries or a family with children where the parent buys for the child.

Families (with children) spend the most

Partly related to group size, household composition also affects spending. Families with children generally spend considerably more per visit than singles or students. This also applies to families without children, although to a slightly lesser extent. Here the same nuance as in the previous paragraph applies.

Figure 32 **Average spending - average group size (number of people)**

Figure 33 **Average spending - household composition**



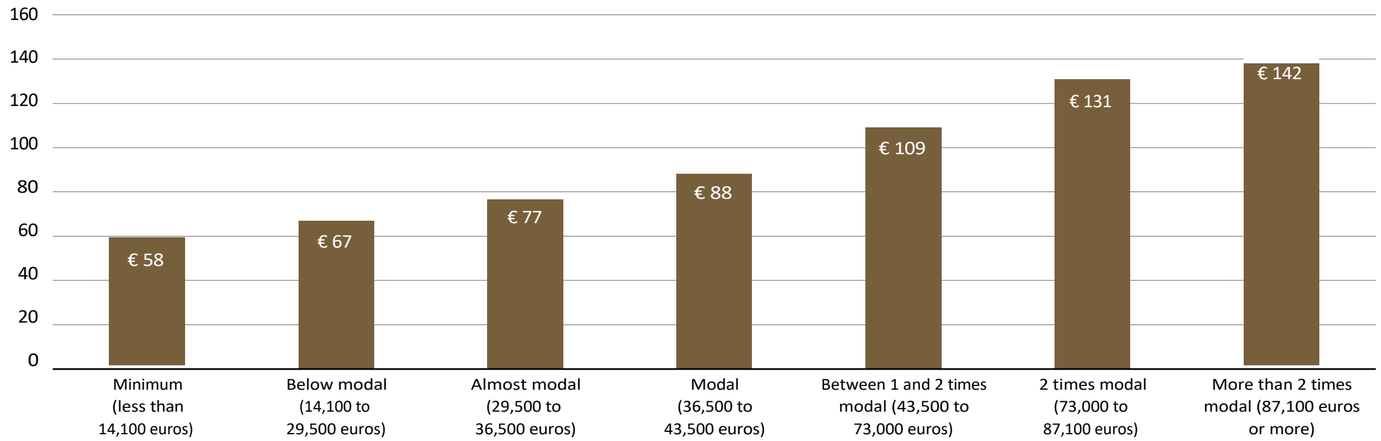
31- to 45-year-olds on average spend the most

On average, the 31- to 45-year-old age group spends the most per person. Younger age groups spend slightly less on average. The same is true for the group older than 45.

The higher the income, the higher the average spending. As income rises, so does the average spending per person. These results are also in line with expectations. As income is higher, people can spend more.

Shopping in Bruges
Source: City of Bruges

Figure 34 **Average spending - income**



Leiden Highland Church
Source: municipality of Leiden

6. Relationship of transportation mode and spending

In this chapter the relationship between transportation mode use and spending is researched, taking into account such factors as frequency of visits. This chapter provides insight into the "value" in money that certain visitors with certain means of transportation have for the centres/ inner cities.

6.1 Spending by mode of transportation

Introduction

This section provides insight into the average spending per visit by mode of transportation for each city centre. The average was calculated by dividing the total spending per visit by respondents of a particular mode of transportation by the total number of respondents using that mode of transportation. Only the three main means of transportation are included, as there are too few observations per city centre for the other means of transportation.

Visitors by car spend the most, but there are differences

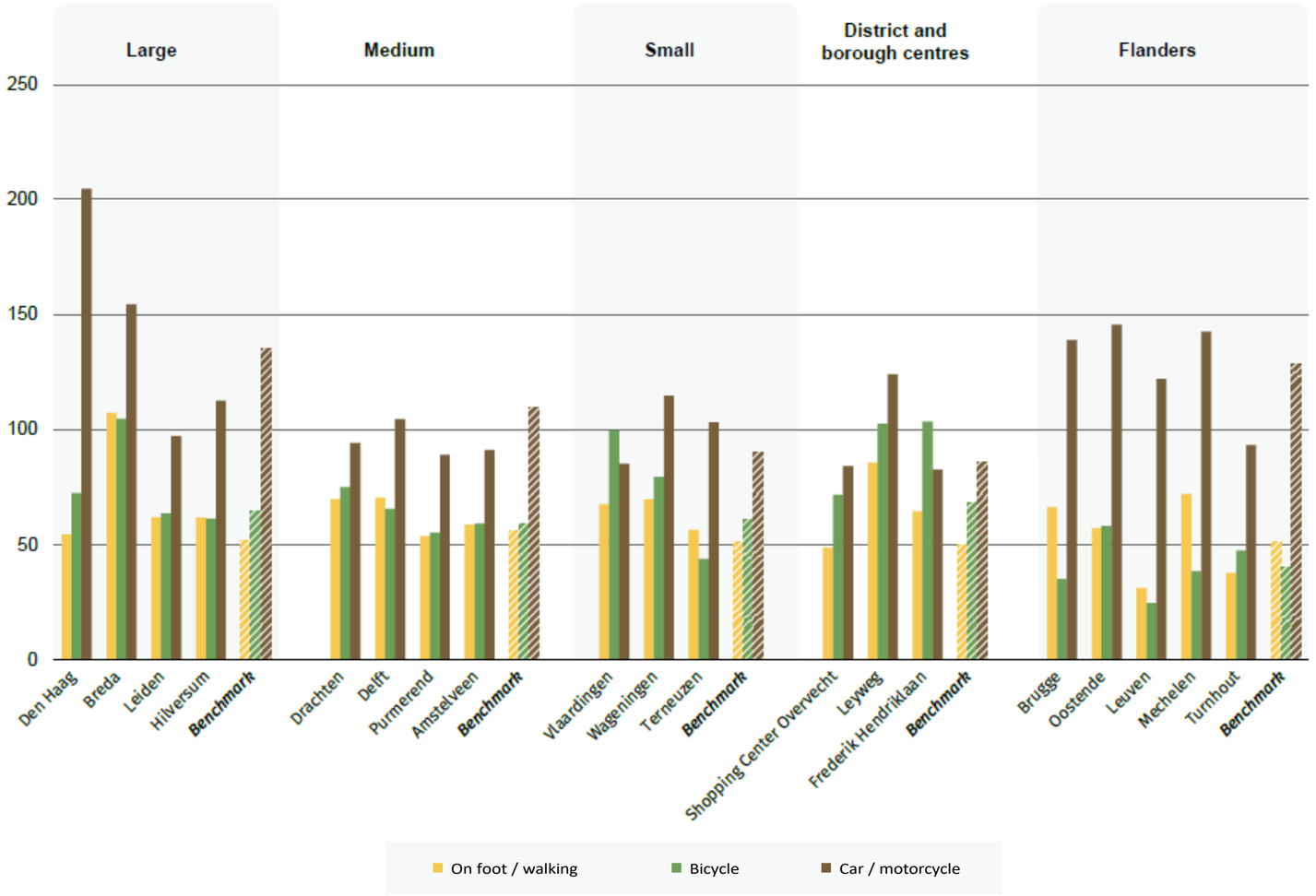
In a general sense, visitors who come by car spend on average (much) more per visit than visitors who come by bicycle or on foot.
This is logical because visitors by car often come from further away, stay longer and therefore visit more facilities. Only in Vlaardingen and Frederik Hendriklaan do visitors spend more per visit by bicycle than by car.

Car visitors spend above average in Flanders In all Flemish centres, the average spending per visit by car visitors is relatively high compared to Dutch centres. A possible explanation is more different visiting motives, combined visits and longer stays (especially in the hospitality industry). All this results in higher average spending in the city centre.

In grocery centres, spending is closer together

When shopping, the average spending per visit of visitors by car is slightly lower than in large inner cities. Reason is that there is a spending limit for daily shopping. People generally do not shop for hundreds of euros. In Vlaardingen, Leyweg and Frederik Hendriklaan the average spending by cyclists is relatively high and often higher than visitors by car.

Figure 35 **Spending by mode of transportation *(including people who spend nothing)***



6.2 Conclusions

Introduction

This section provides insight into average spending per visit and visit frequency by mode of transportation. The calculation includes all centres from 2023 and 2024.

Visitors with cars spend the most per visit Similar to the 2023 survey, visitors with cars spend the most, averaging €112 per visit (across all sectors combined). Visitors who use combinations of means of transport (mostly car and public transport) spend slightly more, but these are relatively few visitors. There is a clear relationship between the means of transportation, provenance and average spending. The travel time/distance a visitor has to travel largely determines the choice of transportation mode. How longer one has to travel, the more likely one is to take the car or the train (in large inner cities). If people are willing to travel longer, they will stay longer and spend more. But, visitors who come from further away, come less often. As a result car, train and combinations also have the lowest visit frequency with 2.5, 2.0 and 2.4 visits per month, respectively.

Pedestrians and cyclists are relatively common

Visitors who come to centres on foot and by bicycle spend much less per visit than visitors who come by car, at €52 and €62, respectively. People with electric bicycles (other two-wheelers) spend even slightly more, at € 72. This is because the electric bicycle can cover a greater distance in a shorter time than a normal bicycle. Again, provenance is the determining factor. However, these visitors do come relatively often. A pedestrian comes an average of 10.2 times per month and bicycle is at 6.1.

Figure 36 **Average spending per visit by mode of transportation**

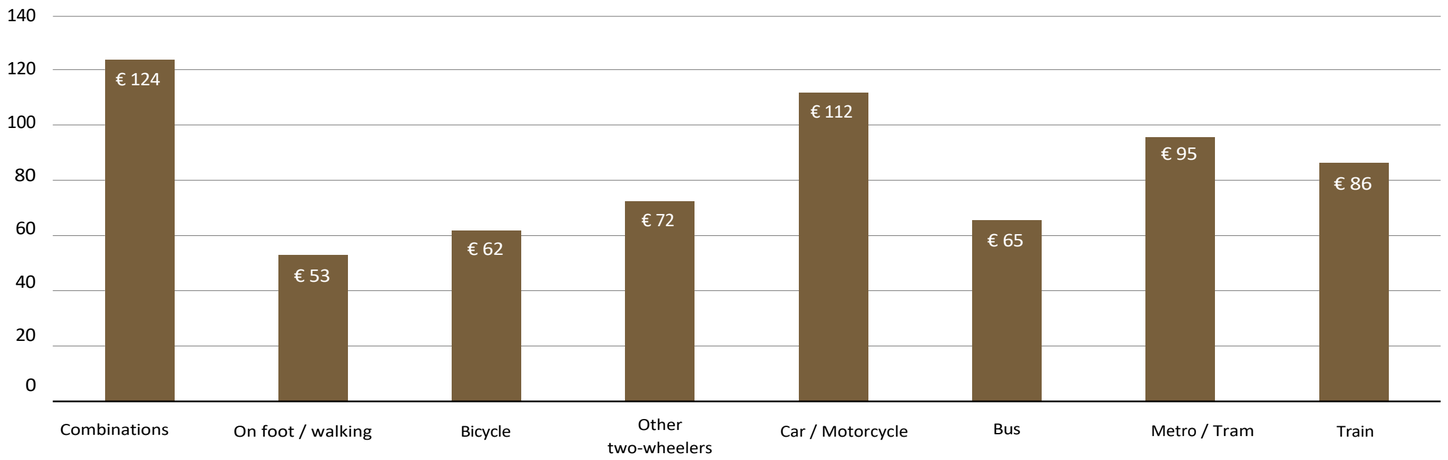
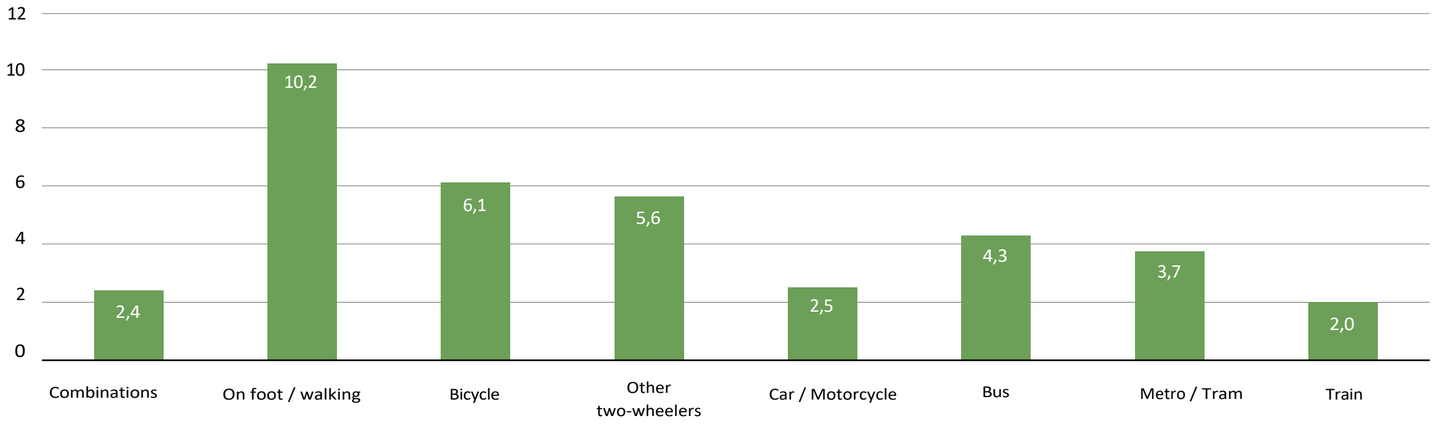


Figure 37 **Average frequency of visits per month by mode of transportation**



6.3 Economic value of visitors

Introduction

Multiplying the average spend per visit by average visit frequency gives the total monthly spend of unique visitors. This gives a picture of what type of visitor generates the most spending. However, this is not the complete picture. If you multiply the absolute number of visits by the modal split as well as the average spending per mode of transportation, the share within the total revenue arises. So this is based on the number of visits. So there is an important difference in interpretation between visitors and visits.

A unique pedestrian yields the most spending... Although a pedestrian spends little per visit (€53), but visits often (10.2 visits per month), that means a total value of an average of € 540 per month in a city centre area. This is almost double the value of a unique visitor by car that brings €280 per month to a city centre area on a monthly basis. In other words, one unique pedestrian equals in economic value almost two unique car visitors. Visitors by bicycle, other two-wheelers and metro/tram are somewhere in between. The other modalities are more comparable to the car in terms of economic value based on unique visitors on a monthly basis. The train stands out with the relatively low spending value of € 174. Visitors by train spend relatively little and come only very occasionally.

... but the car is most important in the share of sales To answer the question of which mode of transportation is most important in total sales, it is not just about the spending of unique visitors on a monthly basis. It is also about the absolute numbers of unique visitors attracted. A city centre which manages to attract proportionately more unique car visitors than unique pedestrians, will, on balance, be more dependent on cars in total sales and vice versa. On balance, for all centres 47% of sales are determined by visitors by car. The

Figure 38 **Average spending per month by mode of transportation *(unique visitor)***

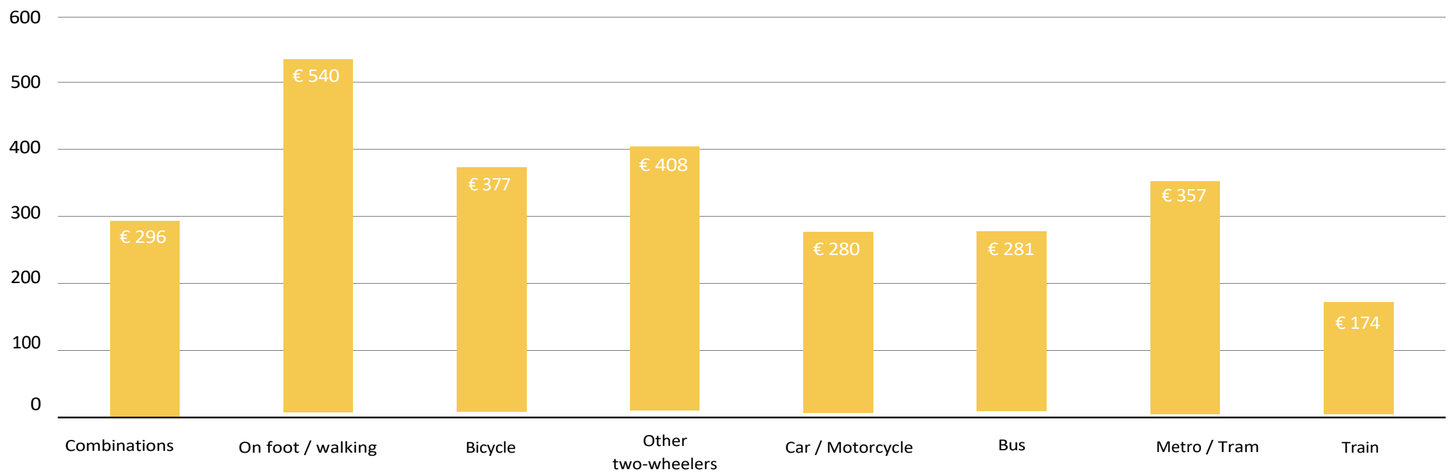
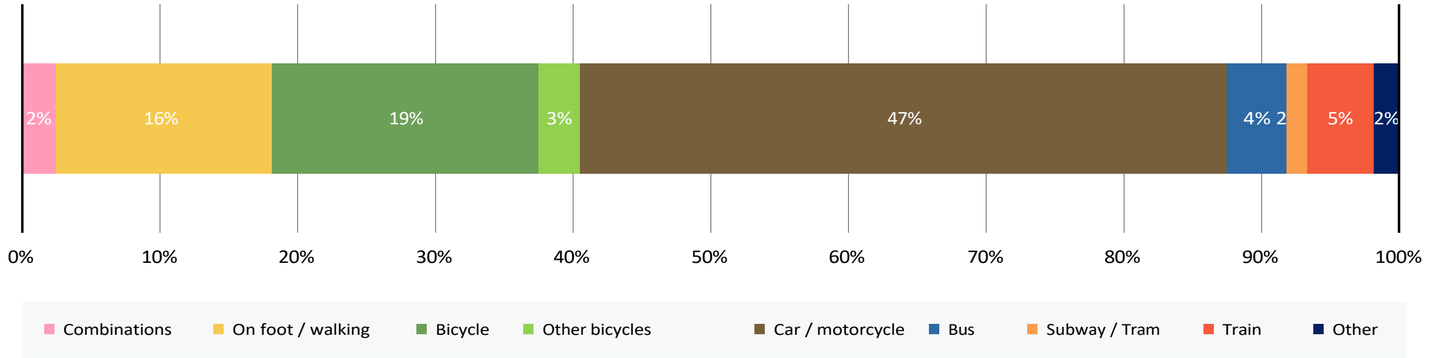


Figure 39 **Share of transportation mode in total sales**



pedestrians, cyclists and other bicycles together account for 38%. Public transportation accounts for 11% of total sales.

Large differences by city centre

As can be seen from the previous chapters, the differences in profile and visitation motive between centres are large. All the different indicators, such as provenance, supply, length of stay, and frequency of visit have an influence on the choice of means of transportation and thus spending and sales.

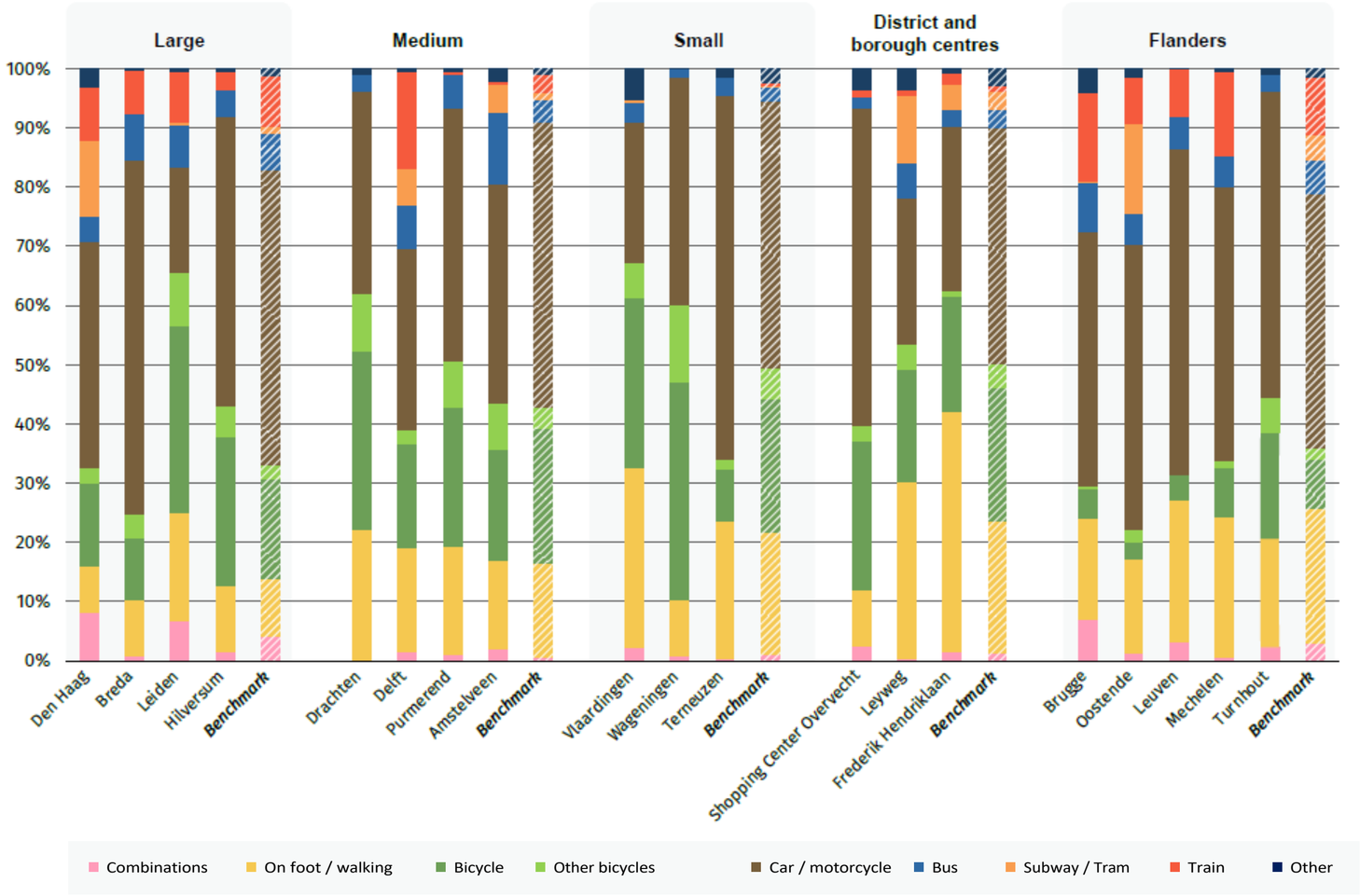
Calculation method share of transportation mode in total sales

Table 1 shows a sample calculation of how the revenue shares in the figure to the right were calculated by city centre. The percentage distribution by mode of transportation is based on the sample. This has been multiplied by an indicative standardised number of visits (100,000 visits). These numbers are multiplied by the average spending per mode of transportation (per city centre). From this follows the indicative standardised revenue. Based on this, the share per means of transport in the total reveneue was calculated. Since we did not collect data on number of visits, we presented only the percentage share of sales.

Table 2 Method of calculating share of transport mode in total sales

	Distribution	Visits	Spending	Revenue	Share of sales
Walking	25%	25.000	€ 45	€ 1.125.000	15%
Bike	20%	20.000	€ 55	€ 1.100.000	14%
Car	35%	35.000	€ 120	€ 4.200.000	54%
OV	10%	10.000	€ 80	€ 800.000	10%
Other	10%	10.000	€ 50	€ 500.00	6%
Total	100%	100.000	-	€ 7.725.000	100%

Figure 40 **Share of transportation mode in total sales**



6.4 Economic value by sector

Introduction

The previous section dealt with total spending. This section zooms in on the three largest sectors, namely grocery shopping, (other) shopping and hospitality. The same system has been used.

Car most important in share of sales for shopping and hospitality

If the breakdown is made by sector, it can be seen that the share of the car especially for shopping is much lower. The supply, type and visiting motive play an important role here. Groceries are usually also done close to home, so the proportion of visitors by car is lower. The car share for the hotel and catering industry is slightly lower than for shopping. A possible explanation is that people who purposefully go to restaurants and bars deliberately do not go by car, in order to consume alcohol responsibly. In addition, shopping flow studies show that the hospitality industry generally attracts more local visitors than (recreational) shopping. These people, as shown in earlier sections, more often come on foot and by bicycle.

"Visitors from further away, however, are willing to make a little more effort, as long as the 'cost' of parking is commensurated with the 'values' in the city centre area.

Figure 41 **Share of transportation mode in total sales - Groceries**

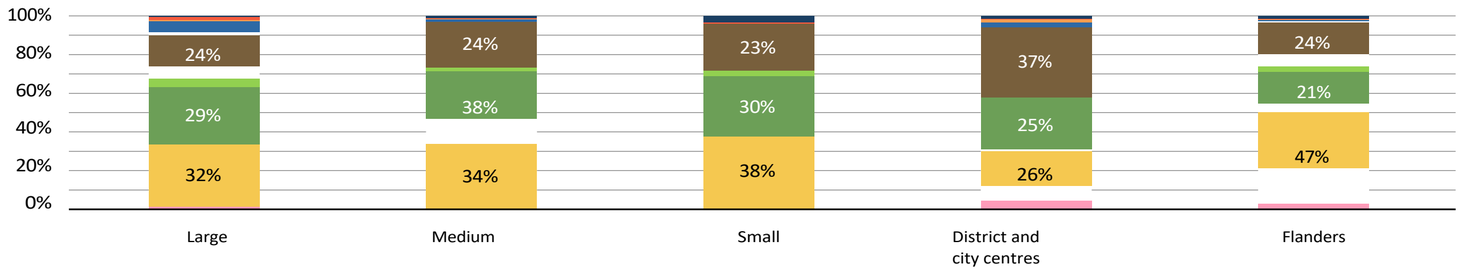


Figure 42 **Share of transportation mode in total sales - Shopping**

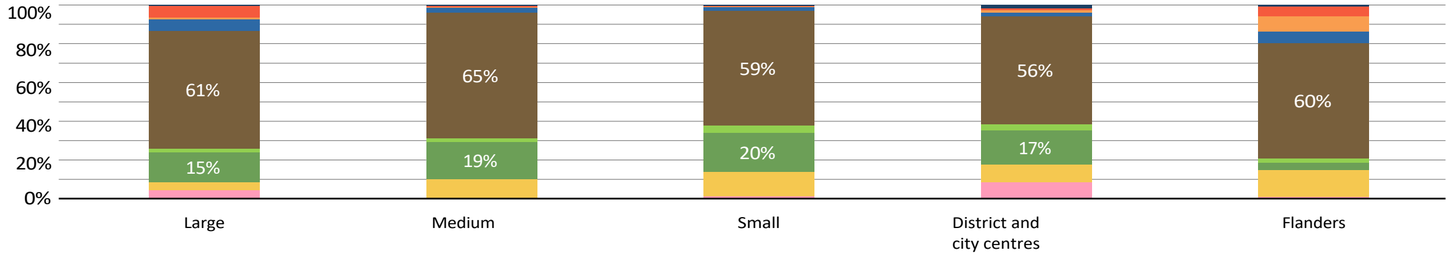
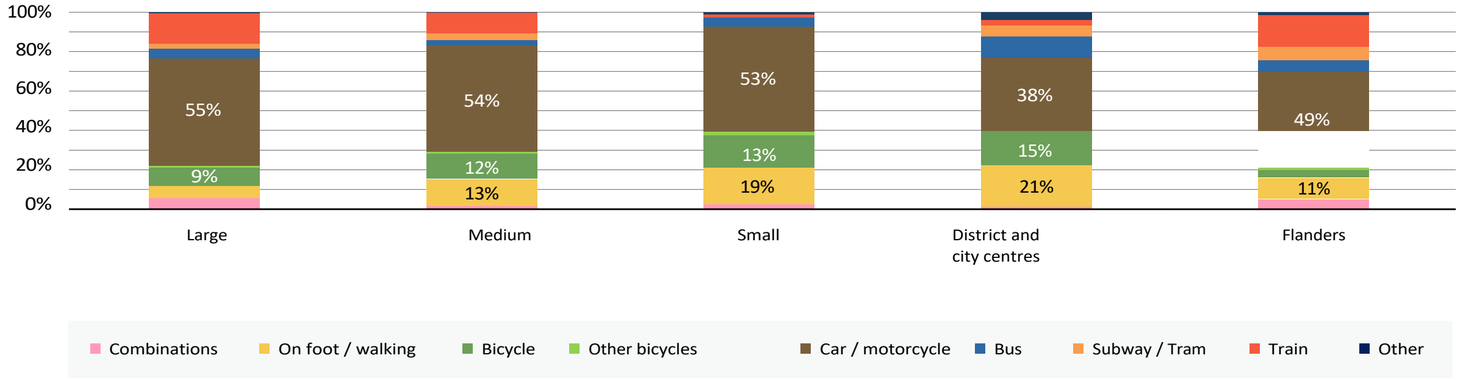


Figure 43 **Share of transportation mode in total sales - Hospitality industry**



◆ **Leiden city centre**
Source: Municipality of Hilversum

Appendix 1

Benchmark classification

Table 3 **Classification benchmark**

Type	Name city centre	Size of public functions (Locatus, m² rfs)
Large	The Hague	280.988
Large	Groningen	201.049
Large	Maastricht	187.507
Large	Breda	154.625
Large	Arnhem	149.512
Large	Leiden	148.652
Large	Nijmegen	147.679
Large	's-Hertogenbosch	129.674
Large	Tilburg	128.063
Large	Hilversum	107.760
Large	Apeldoorn	107.357
Large	Venlo	103.113
Medium	Drachten	81.114
Medium	Delft	79.039
Medium	Roermond	70.064
Medium	Goes	57.349
Medium	Oosterhout	57.176
Medium	Alphen a/d Rijn	55.936
Medium	Purmerend	54.683
Medium	Oss	51.666
Medium	Amstelveen	51.450
Small	Vlaardingen	45.000
Small	Wageningen	42.016
Small	Terneuzen	38.209
Small	Den Helder	34.570
Small	Boxtel	25.646
Small	Middelharnis	22.629
District and borough centres	Bogaard City Center	41.413
District and borough centres	Shopping Center Overvecht	30.856
District and borough centres	The Hague Leyweg	30.075
District and borough centres	The Hague Frederik Hendriklaan	20.104
District and borough centres	Westermarkt (Tilburg)	14.821
Flanders	Bruges	169.361
Flanders	Ostend	142.704
Flanders	Leuven	96.828
Flanders	Mechelen	74.221
Flanders	Turnhout	40.962

Shopping shuttle Source: City of Mechelen

*** Please note that** the classification differs from 2023 as it is based on the most recent Locatus data November 2024 and the current city centre areas participating. Rfs total for Flemish centres is based on Locatus data in Knowledge Network Retail's most recent Fact Sheets. Rfs hospitality and services is an estimate by BRO, because the Fact Sheets only contain number of cases.

Drachten city centre
Source: Municipality of Smallingerland

Appendix 2

Differences method relative to 2023

Introduction

Although the report has essentially the same format as the 2023 main report, some methodological changes have been applied. This appendix explains the main changes. In general sense, a comparison with the 2023 report is not recommended because many averages and conclusions, regardless of other methods, have also been recalculated with the new 2024 data.

Calculation of visit frequency

In 2023, visit frequency had been calculated solely on the "September" demand. This means that only the more frequent visitors who had visited the city centre in September had been included. In the 2024 main report, visit frequency was calculated on the 'usually' demand. While this is less precise, it gives a more complete picture of the visit frequency of all visitors, including the more occasional visitors and tourists who are somewhere for the first time. As a result, the visit frequency of visitors by car is much lower now than in 2023.

Calculation of average spending

In 2023, the average spending was calculated by dividing respondents' total spending by all respondents who had spent something. This is also known as the average receipt amount. In order to link spending to visitor numbers (visit units), non-spenders, also known as the 0 values, must also be taken into account. In this main report, all average spending was divided by all respondents, including non-spenders. As a result, the ratio remains the same, but the absolute amount is lower.

Calculation of share of transport mode in sales

In 2023, the share of total sales by mode of transportation was not calculated. We did not go beyond the "value of a unique visitor" in 2023 by multiplying the average spend by the average frequency of visits. In 2024, we additionally calculated the share of sales.

Calculating loyalty

In 2023, loyalty was calculated on the "September" question. We looked at people who made multiple visits in September, and expressed this as a percentage loyalty. Since we added a new question in 2024, more generally, we calculated loyalty based on this new question. This is the question about whether people ever come by a different mode of transportation. This question is less precise, but, similar to visit frequency, gives a better picture for all visitors. So also the occasional visitors. For future editions we will probably remove the "September" question, as we no longer use it due to replacement with new questions.

Purmerend
Source: Municipality of Purmerend

Appendix 3

Parking regimes overview

Table 4 **Parking regime and assessment based on shopping flow study**

Type	Name city centre	Share of car visits	Paid parking	Accessibility by car	Bike accessibility	Public transportation accessibility	Parking car	Storing bicycle
Large	The Hague	19%	Yes	5,8	7,9	8,4	5,9	6,8
Large	Groningen	24%	Yes	5,4	8,2	7,6	5,3	6,9
Large	Maastricht	34%	Yes	6,7	7,9	8,2	6,4	7
Large	Breda	53%	Yes	7,3	8,3	8,2	6,9	7,8
Large	Arnhem	52%	Yes	6,4	7,9	8,2	6,1	7,3
Large	Leiden	13%	Yes	5,7	8,5	7,9	5,6	7,3
Large	Nijmegen	32%	Yes	6,6	8,4	7,9	6,4	7,7
Large	's-Hertogenbosch	32%	Yes	7,1	8,5	8,1	6,7	7,8
Large	Tilburg	35%	Yes	6,6	8,3	7,9	6,6	7,7
Large	Hilversum	35%	Yes	6,4	8,1	7,6	6,8	7,1
Large	Apeldoorn	27%	Yes	6,5	8,1	7,4	6,4	7,8
Large	Venlo	48%	Yes	7,1	7,6	8,3	6,7	7,5
Medium	Drachten	29%	Yes	7,3	8,1	7	7	6,9
Medium	Delft	24%	Yes	6,1	8,5	7,4	6,4	7,3
Medium	Roermond	53%	Yes	6,8	7,4	8,2	6,4	7,7
Medium	Goes	-	-	-	-	-	-	-
Medium	Oosterhout	34%	Yes	7,6	8,3	7	7,2	7,4
Medium	Alphen a/d Rijn	28%	Yes	7,2	8,4	7,4	6,8	7,6
Medium	Purmerend	32%	Yes	6,4	8,2	6,9	5,9	7,2
Medium	Oss	37%	Yes	7,5	8,3	6,2	7,2	7,8
Medium	Amstelveen	30%	Yes	8	8,3	8,3	7,8	7,4
Small	Vlaardingen	23%	Yes	6,7	8,2	7,3	6	7,4
Small	Wageningen	31%	Yes	7	8,3	6,6	6,4	6,8
Small	Terneuzen	-	-	-	-	-	-	-
Small	Den Helder	38%	No	7,3	8,4	7,6	7,1	7
Small	Boxtel	30%	Yes	6,2	8,3	5,9	6	6,4
Small	Middelharnis	56%	No	8	8,5	7,6	7,7	7,7
District and borough centres	Bogaard City city centre	39%	Yes	7,6	8,1	8	7,1	7,7
District and borough centres	Shopping Center Overvecht	43%	No	8,1	8,2	8	8	7,4
District and borough centres	The Hague Leyweg	-	-	-	-	-	-	-
District and borough centres	The Hague Fred. Hendriklaan	26%	No	7,5	8,8	8,1	5,6	6,5
District and borough centres	Westermarkt (Tilburg)	45%	No	7,5	8,3	8,2	7	7
Flanders	Bruges	-	-	-	-	-	-	-
Flanders	Ostend	-	-	-	-	-	-	-
Flanders	Leuven	-	-	-	-	-	-	-
Flanders	Mechelen	-	-	-	-	-	-	-
Flanders	Turnhout	-	-	-	-	-	-	-

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