Tourism in figures 2012

the British market in Flanders

July 2013

toerisme vlaanderen

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A. The British market in Flanders

1. Key figures

Table 1: Total foreign and British market in Flanders 2012

	overall total foreign travellers	British travellers	% British	ranking British market
arrivals	6.377.337	813.182	12,8%	3th
overnight stays	13.775.762	1.661.058	12,1%	4th
length of stay (nights)	2,2	2,0	-	-

Source: Tourism Flanders based on GDS

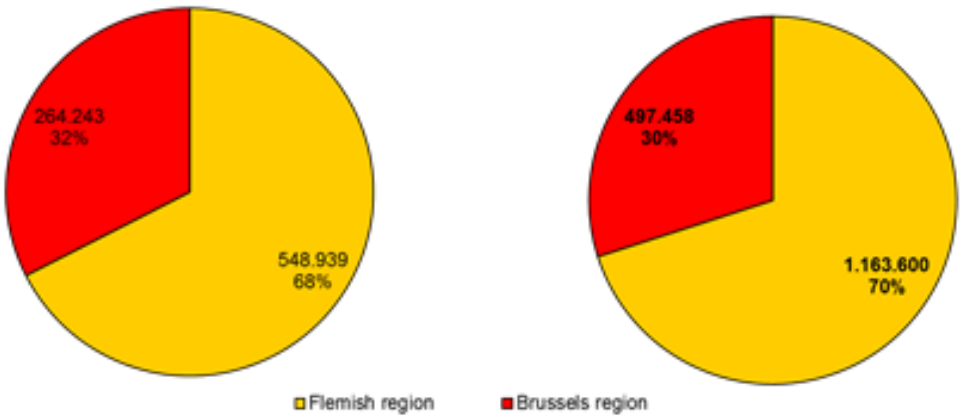
2. Distribution within Flanders

Table 2: The British market in Flanders by region 2012

	arrivals	%	overnights	%
Flemish region	548.939	68%	1.163.600	70%
Brussels region	264.243	32%	497.458	30%
Flanders	**813.182**	**100%**	**1.661.058**	**100%**

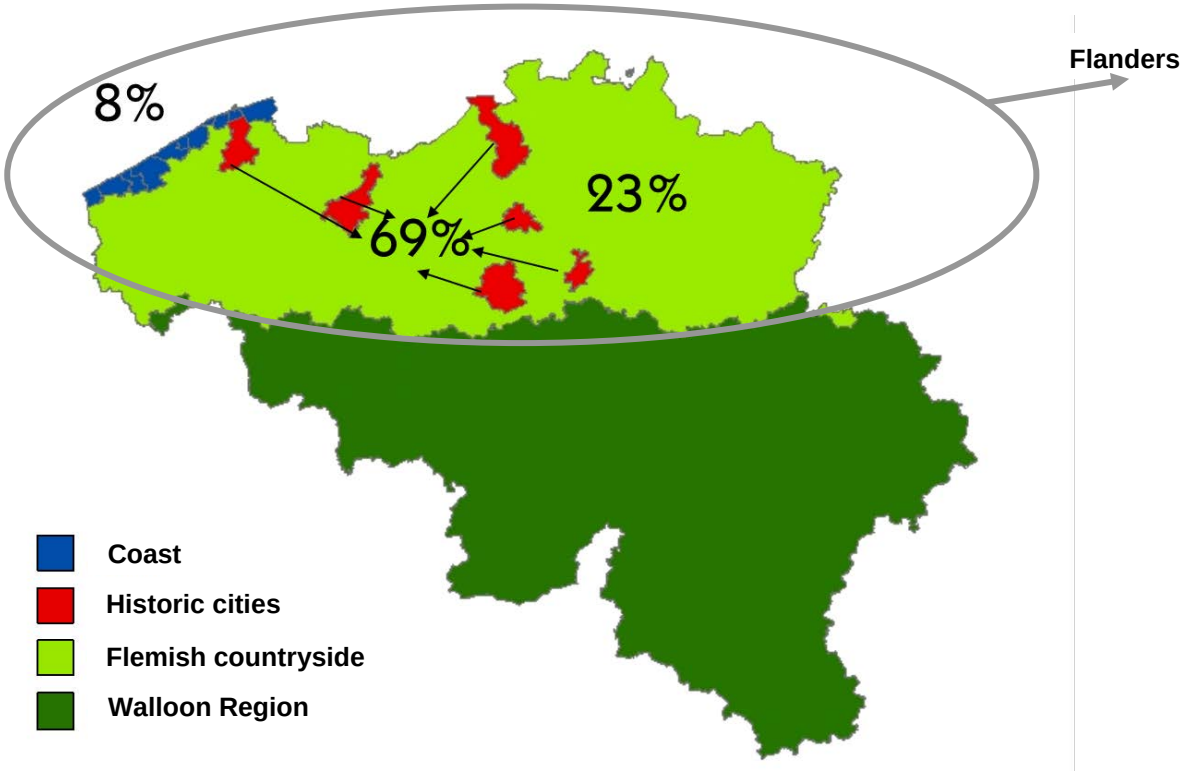
Source: Tourism Flanders based on GDS

Figure 1: The British market in Flanders by region 2012 (arrivals (left) and overnights (right))



Source: Tourism Flanders based on GDS

Figure 2: British overnights in Flanders 2012



Source: Tourism Flanders based on GDS

Table 3: The British market in Flanders by destination 2012

	overnights	%
Coast	137.795	8%
Historic cities	1.147.782	69%
Flemish countryside	375.481	23%
Flanders	**1.661.058**	**100%**

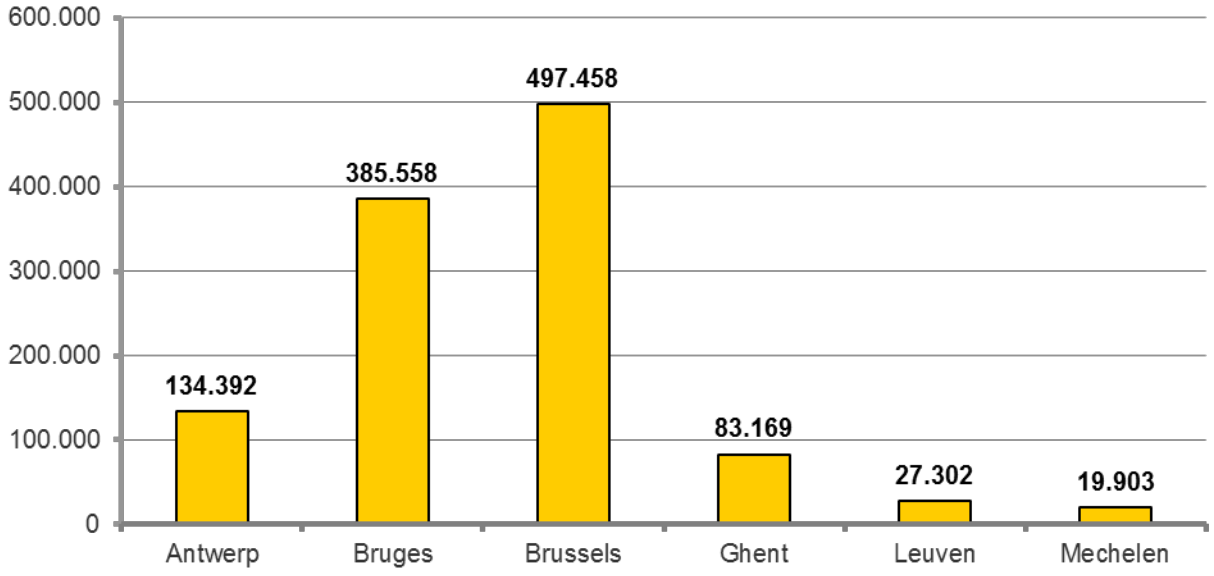
Source: Tourism Flanders based on GDS

Table 4: The British market in the historic cities 2012

	overnights	%
Antwerp	134.392	12%
Bruges	385.558	34%
Brussels	497.458	43%
Ghent	83.169	7%
Leuven	27.302	2%
Mechelen	19.903	2%
Historic cities	**1.147.782**	**100%**

Source: Tourism Flanders based on GDS

Figure 3: British overnights in the historic cities 2012



Source: Tourism Flanders based on GDS

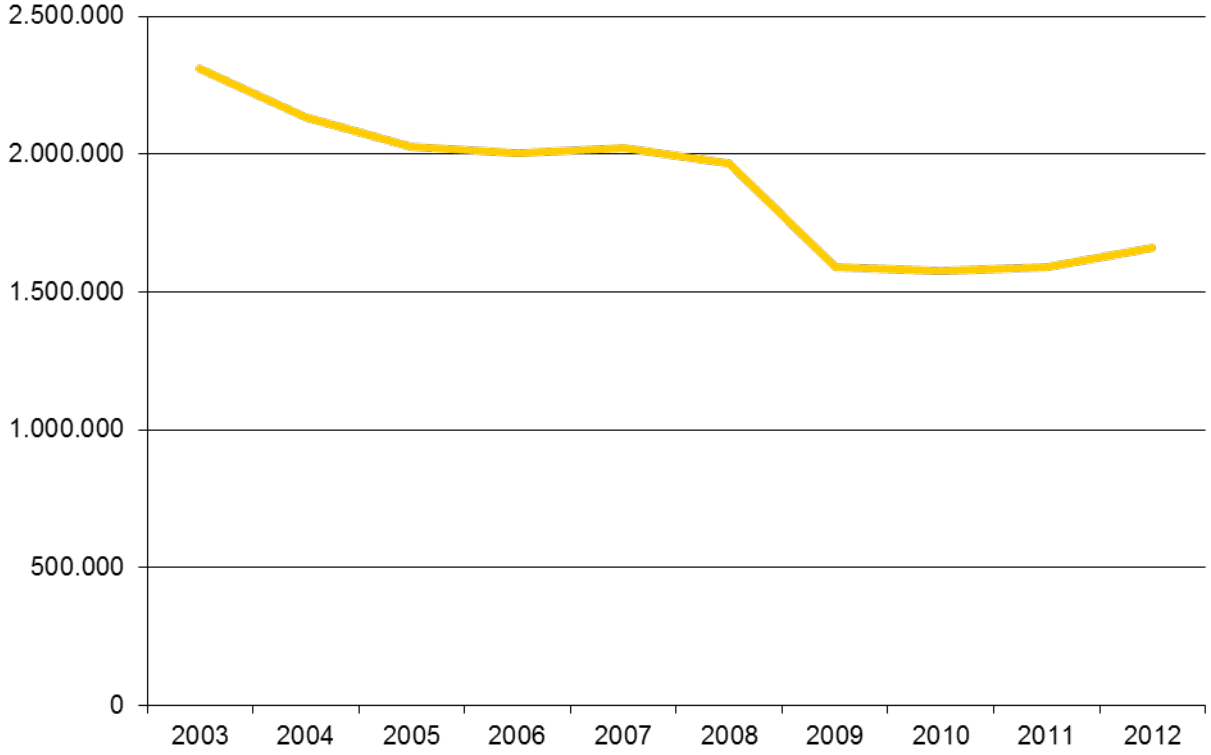
3. Trends

Table 5: Trend of British overnights, arrivals and average length of stay in Flanders 2003-2012

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	03-12
Overnights (x1.000)	2.309	2.134	2.027	2.002	2.022	1.966	1.589	1.577	1.589	1.661	-28,1%
Arrivals (x1.000)	1.086	1.028	985	969	949	932	770	770	779	813	-25,1%
Average length of stay*	2,13	2,08	2,06	2,07	2,13	2,11	2,06	2,05	2,04	2,04	-4,0%

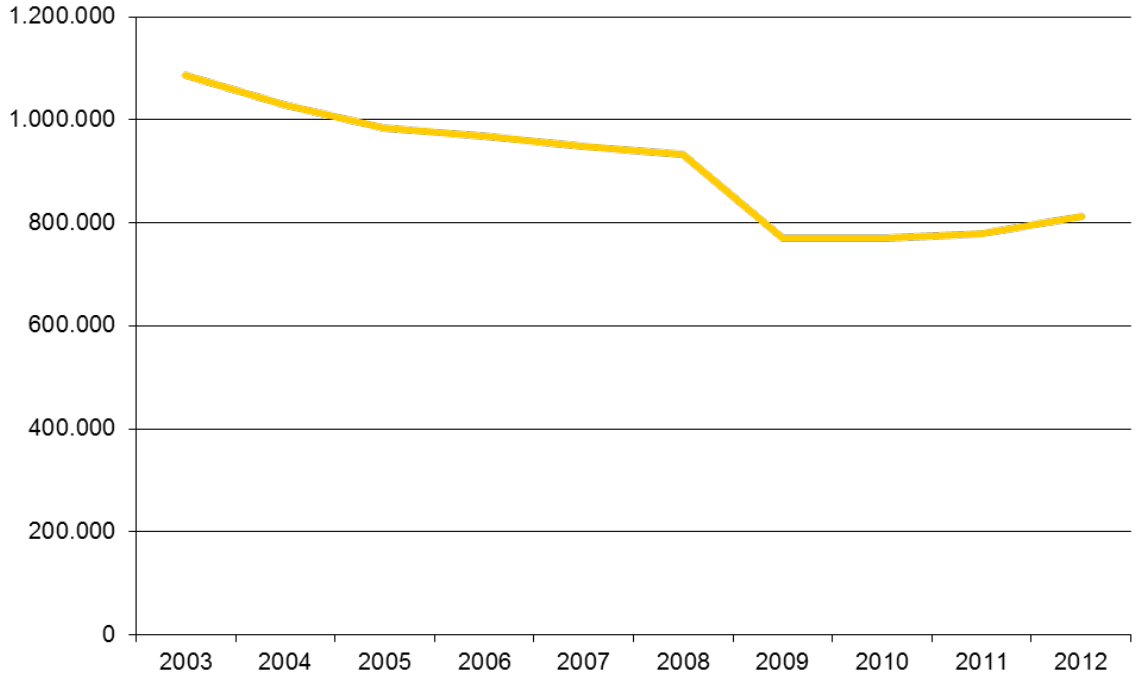
Source: Tourism Flanders based on GDS **nights*

Figure 4: Trend of British overnights in Flanders 2003-2012



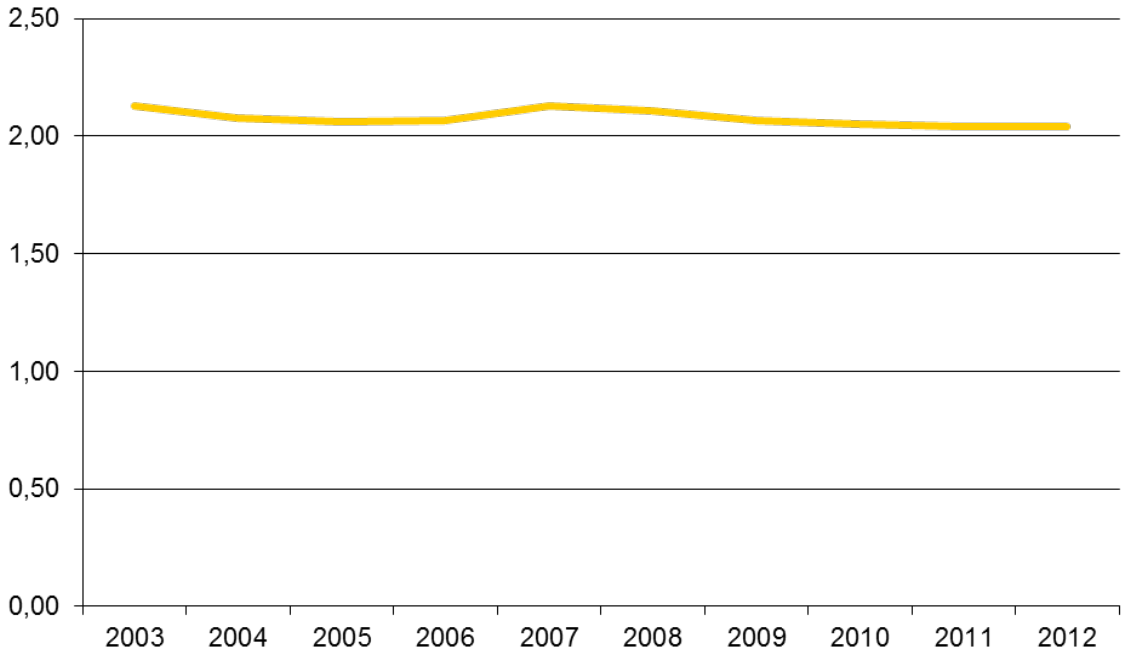
Source: Tourism Flanders based on GDS

Figure 5: Trend of British arrivals in Flanders 2003-2012



Source: Tourism Flanders based on GDS

Figure 6: Trend of the average length of stay of British in Flanders 2003-2012



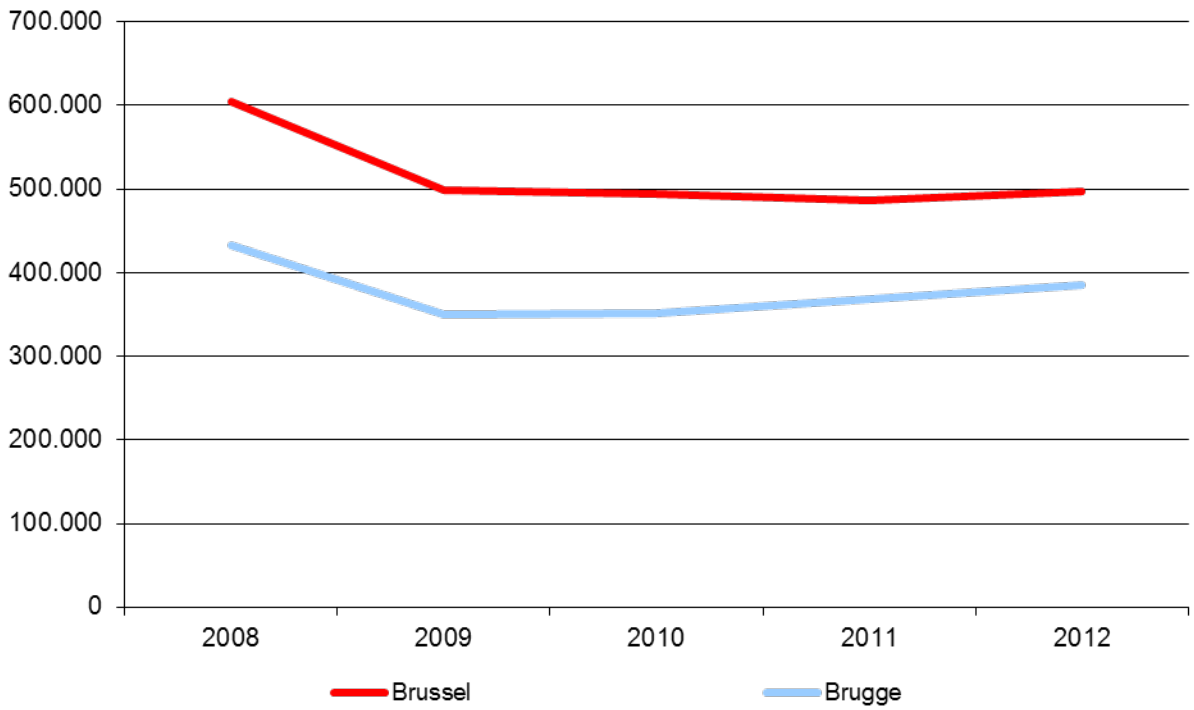
Source: Tourism Flanders based on GDS

Table 6: Trend of British overnights in Flanders 2008-2012

	2008	2009	2010	2011	2012	08-12
Coast	234.550	154.066	153.115	135.228	137.795	-41,3%
Historic cities	1.325.490	1.077.917	1.070.864	1.083.211	1.147.782	-13,4%
Antwerp	124.708	97.925	93.953	104.790	134.392	+7,8%
Bruges	432.224	350.743	351.426	368.064	385.558	-10,8%
Brussels	605.018	499.390	494.007	486.140	497.458	-17,8%
Ghent	91.315	74.592	78.650	75.440	83.169	-8,9%
Leuven	38.034	31.064	30.545	24.186	27.302	-28,2%
Mechelen	34.191	24.203	22.283	24.591	19.903	-41,8%
Flemish countryside	405.696	356.850	353.271	370.335	375.481	-7,4%
Flanders	**1965736**	**1.588.833**	**1.577.250**	**1.588.774**	**1.661.058**	**-15,5%**

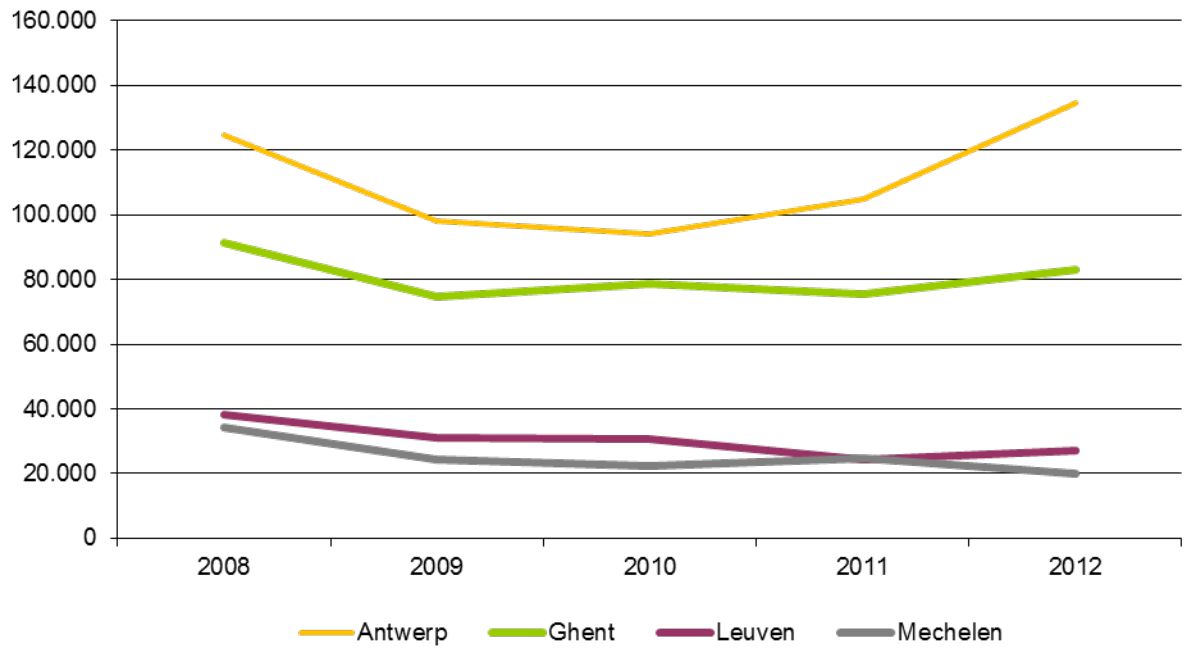
Source: Tourism Flanders based on GDS

Figure 7: Trend of British overnights in Brussels and Bruges 2008-2012



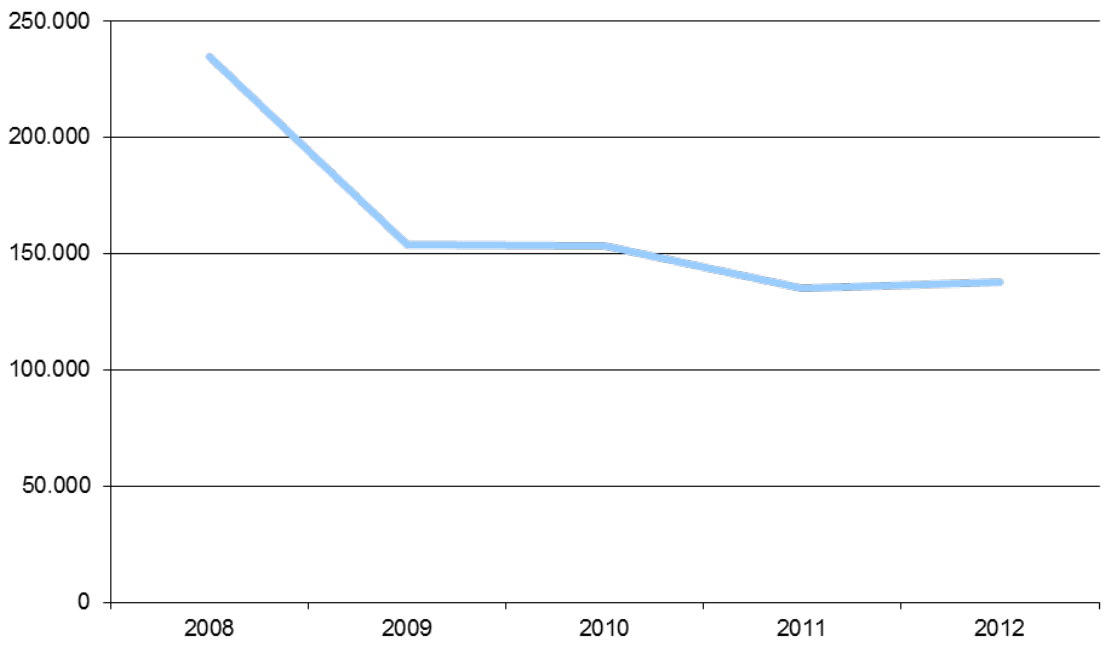
Source: Tourism Flanders based on GDS

Figure 8: Trend of British overnights in Antwerp, Ghent, Leuven, Mechelen 2008-2012



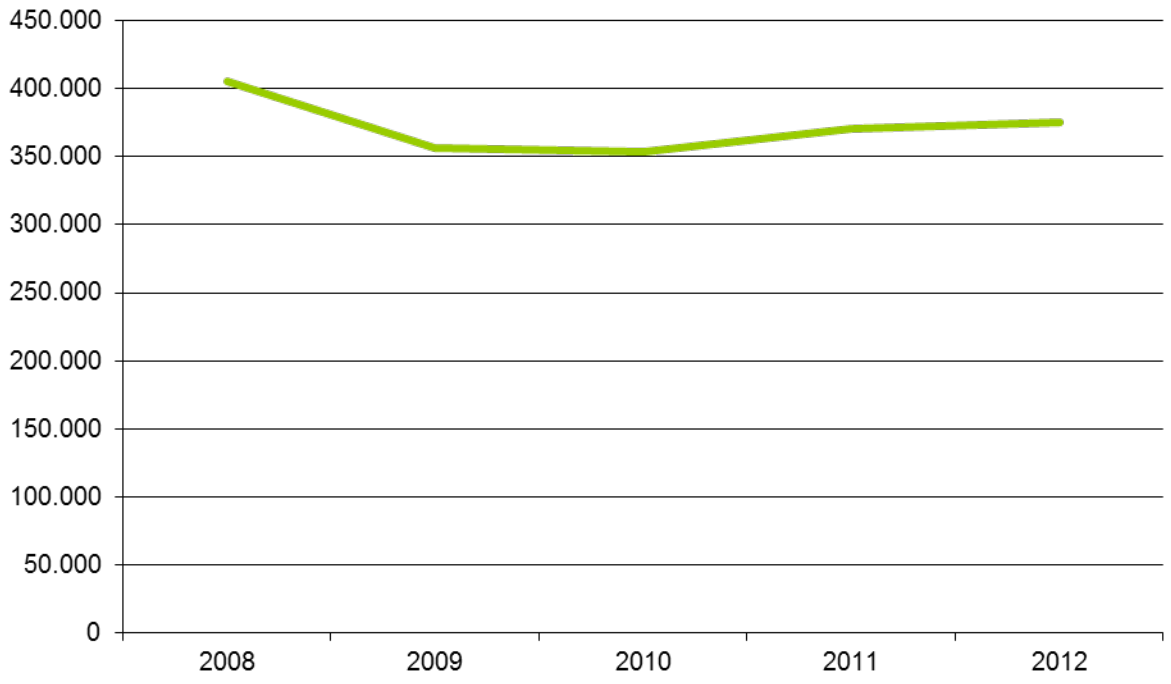
Source: Tourism Flanders based on GDS

Figure 9: Trend of British overnights at the coast 2008-2012



Source: Tourism Flanders based on GDS

Figure 10: Trend of British overnights in the Flemish countryside 2008-2012



Source: Tourism Flanders based on GDS

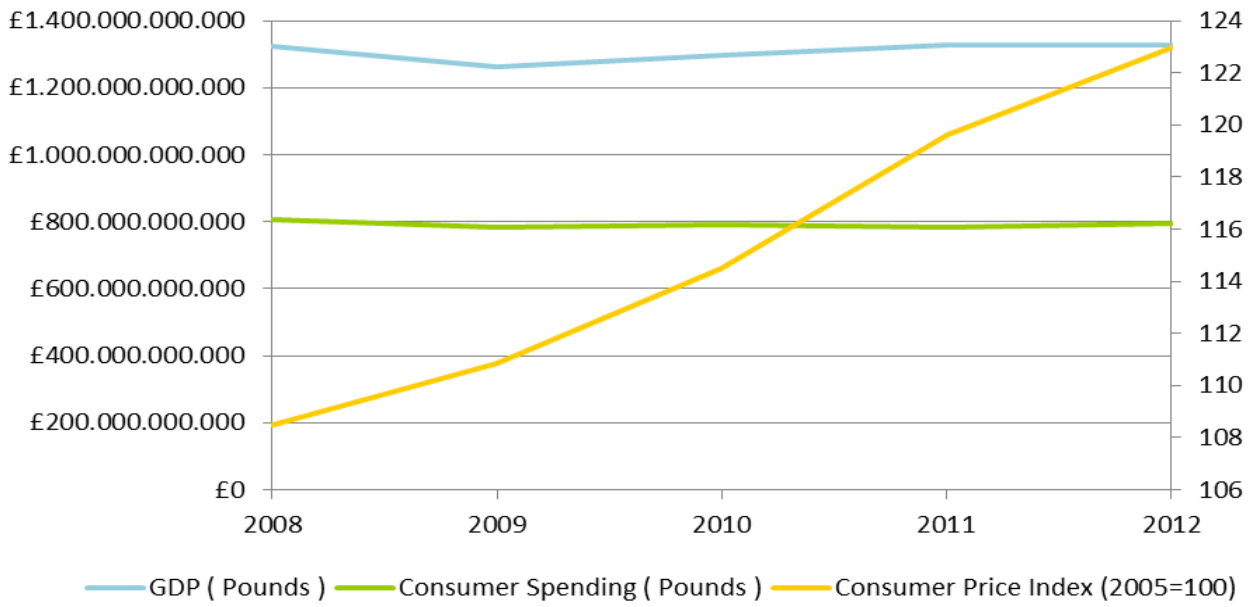
4. Economic indicators

Table 7: Trend of the British economy 2008-2012

	2008	2009	2010	2011	2012	08-12
GDP, real (x1000 000£)	1.324.660	1.261.680	1.298.170	1.326.760	1.328.850	+0,3%
Consumer spending (x1000 000 £)	806.854	782.419	792.672	784.241	793.710	-1,6%
Consumer Price Index (base 2005)	108,5	110,8	114,5	119,6	123,0	+13,4%

Source: Tourism Flanders based on TDM

Figure 11: Trend of British economy 2008-2012



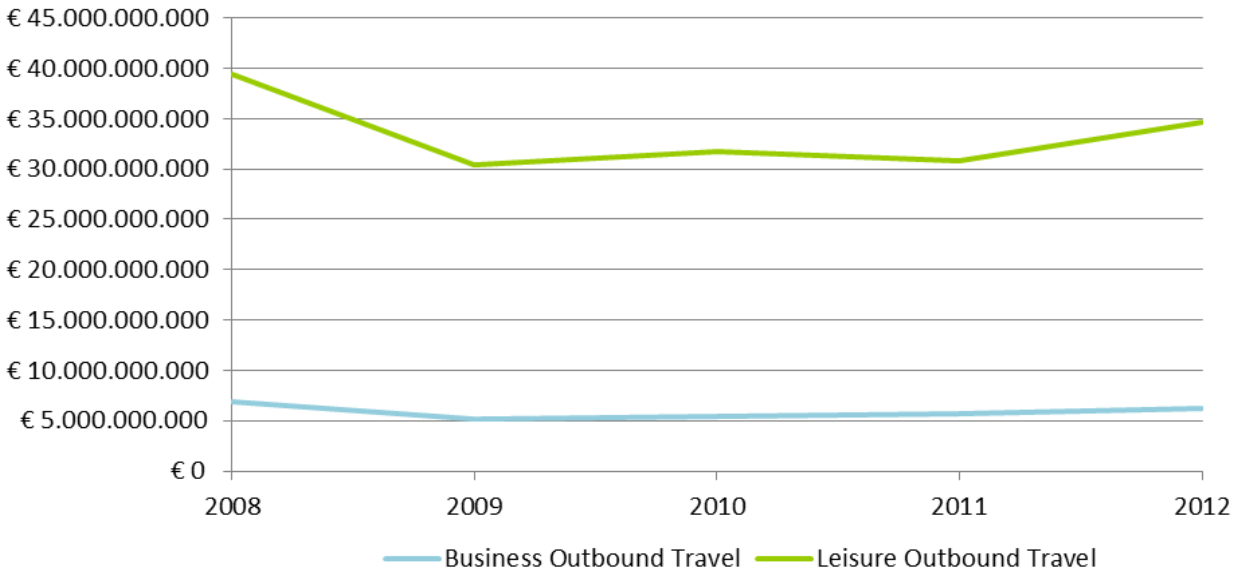
Source: Tourism Flanders based on TDM

Table 8: Trend of British Population 2008-2012

	2008	2009	2010	2011	2012
Population	61.446.102	61.855.500	62.326.102	62.810.000	63.246.301
Population, 65+	19,2%	19,4%	19,5%	19,2%	19,2%
Unemployement rate	5,8%	7,7%	7,9%	8,1%	7,9%

Source: Tourism Flanders based on TDM

Figure 12: Total British Outbound Travel expenditure 2008-2012



Source: Tourism Flanders based on TDM

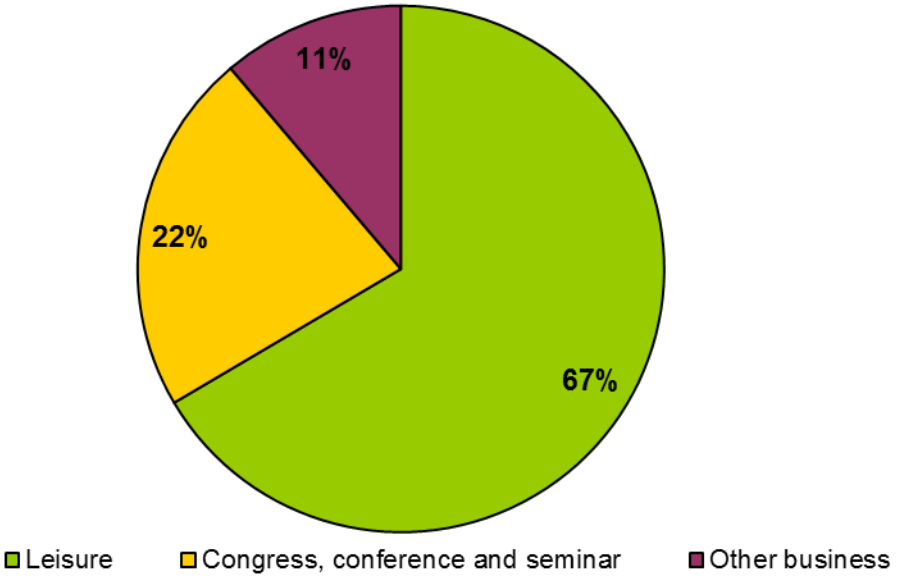
5. Motive of stay

Table 9: The British market in Flanders by motive of stay 2012 (overnights)

	Leisure		Congress, conference and seminar		Other business		Total	
Coast	127.401	92%	5.422	4%	4.972	4%	137.795	100%
Historic cities	716.050	62%	299.959	26%	131.773	11%	1.147.782	100%
Antwerp	56.827	42%	32.487	24%	45.078	34%	134.392	100%
Bruges	357.170	93%	23.112	6%	5.276	1%	385.558	100%
Brussels	225.147	45%	213.877	43%	58.434	12%	497.458	100%
Ghent	50.917	61%	20.576	25%	11.676	14%	83.169	100%
Leuven	12.622	46%	7.175	26%	7.505	27%	27.302	100%
Mechelen	13.367	67%	2.732	14%	3.804	19%	19.903	100%
Flemish countryside	261.382	70%	64.847	17%	49.252	13%	375.481	100%
Flanders	**1.104.833**	**67%**	**370.228**	**22%**	**185.997**	**11%**	**1.661.058**	**100%**

Source: Tourism Flanders based on GDS

Figure 13: The British market in Flanders by motive of stay 2012 (overnights)



Source: Tourism Flanders based on GDS

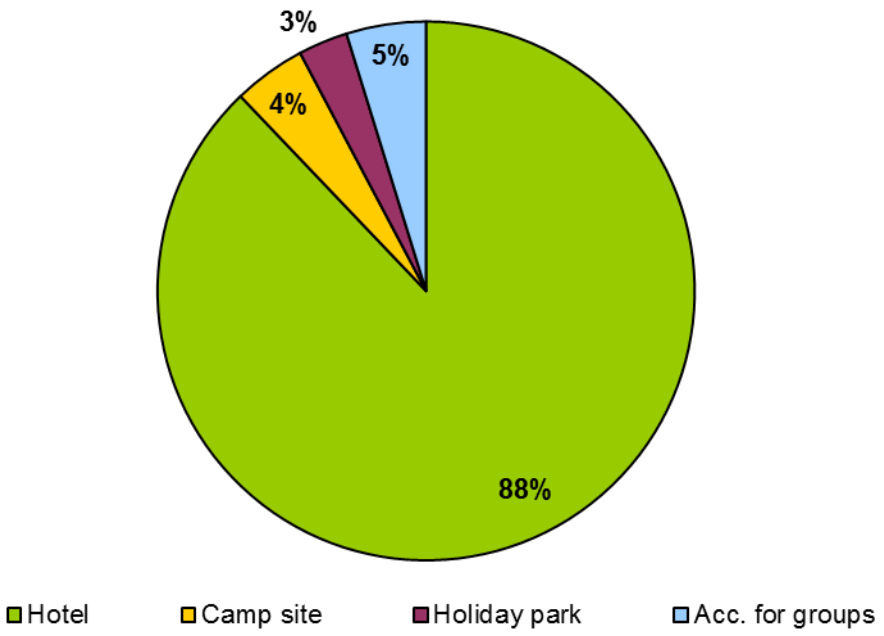
6. Type of accommodation

Table 10: The British market in Flanders by type of accommodation 2012 (overnights)

	Coast	%	Historic cities	%	Flemish countryside	%	Flanders	%
Hotel	100.027	73%	1.094.487	95%	264.832	71%	1.459.346	88%
Camp site	11.277	8%	20.731	2%	40.640	11%	72.648	4%
Holiday park	22.352	16%	0	0%	27.082	7%	49.434	3%
Acc. for groups	4.139	3%	32.564	3%	42.927	11%	79.630	5%
Total	**137.795**	**100%**	**1.147.782**	**100%**	**375.481**	**100%**	**1.661.058**	**100%**

Source: Tourism Flanders based on GDS

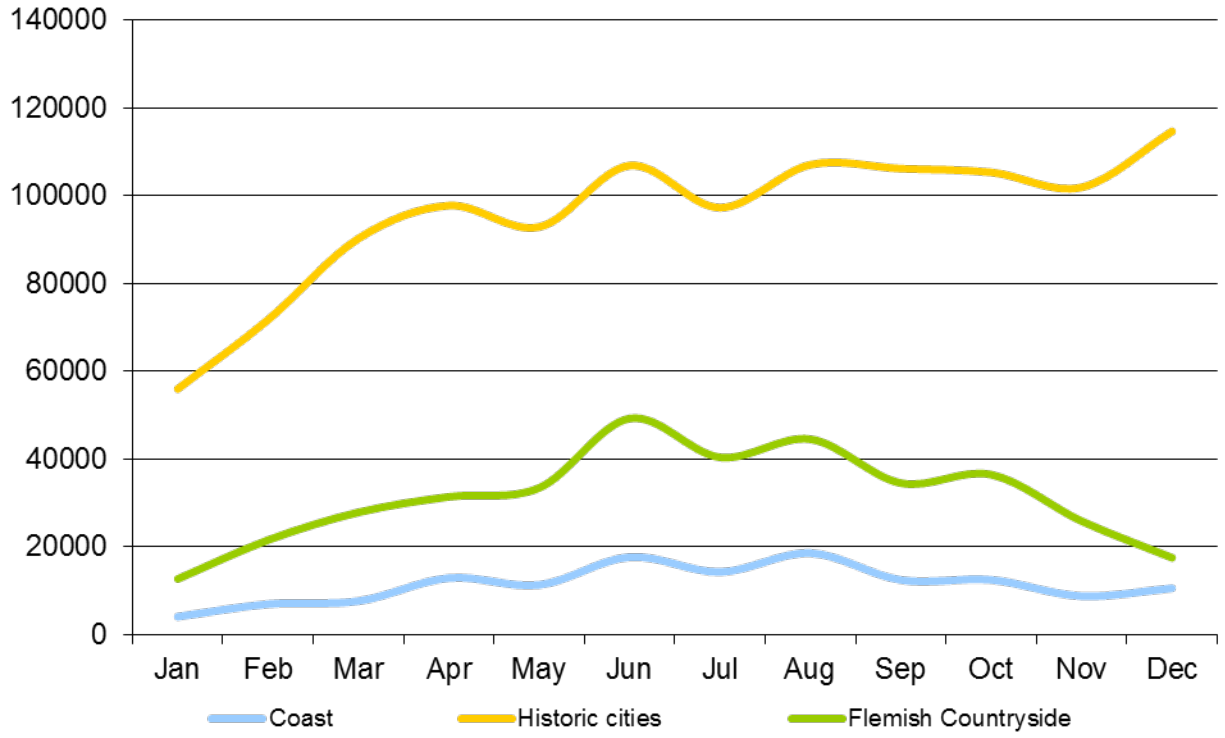
Figure 14: The British market in Flanders by type of accommodation 2012 (overnights)



Source: Tourism Flanders based on GDS

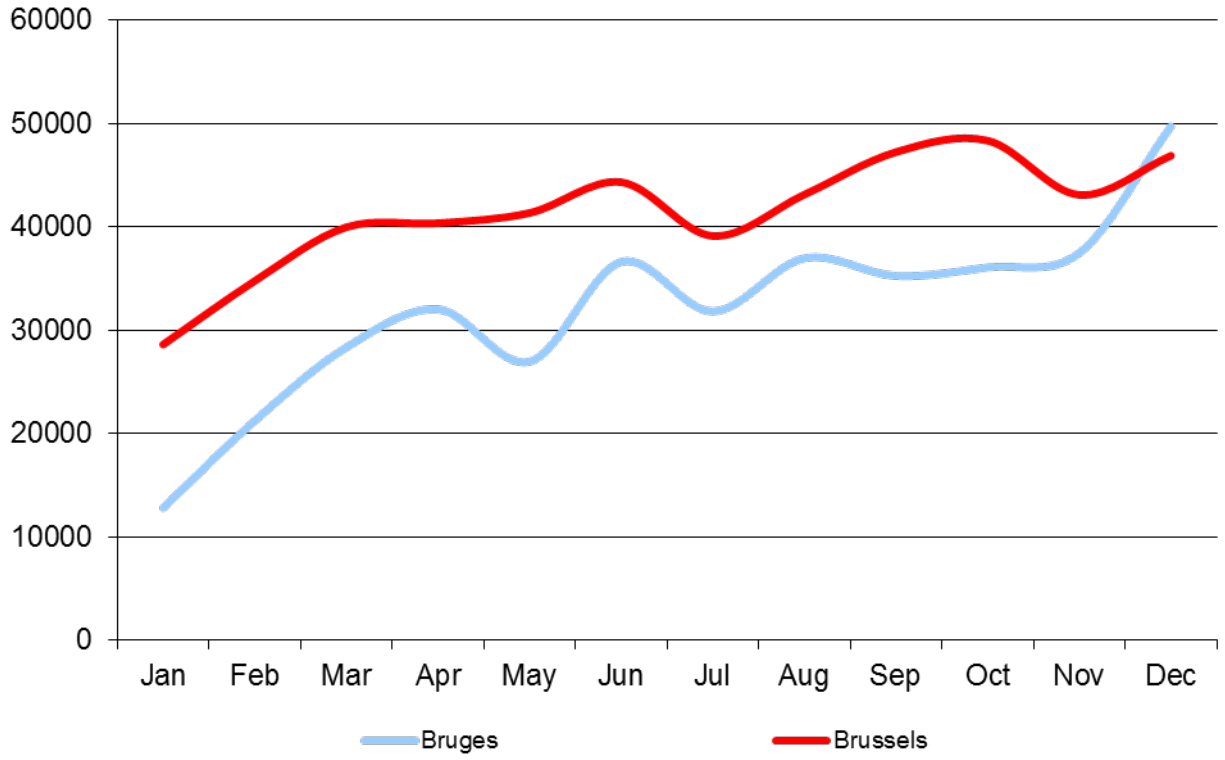
7. Seasonality

Figure 15: British overnights in Flanders – seasonality 2012



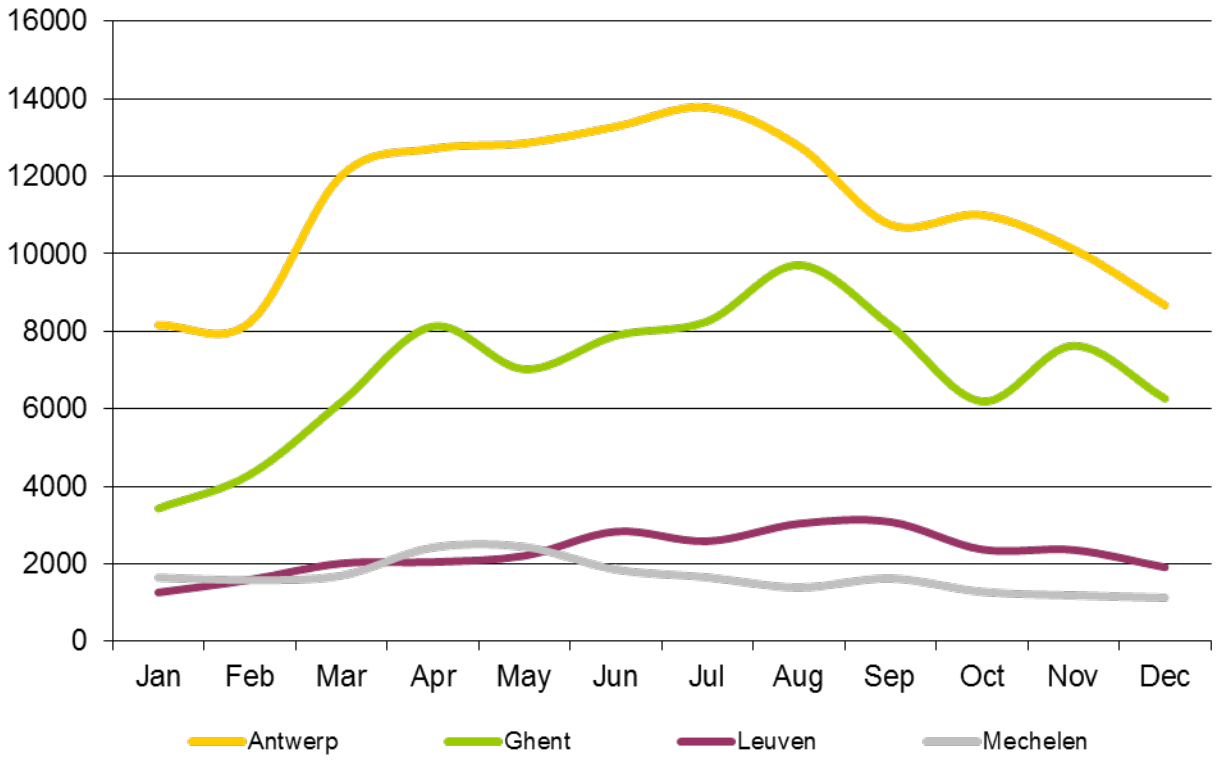
Source: Tourism Flanders based on GDS

Figure 16: British overnights in Brussels and Bruges – seasonality 2012



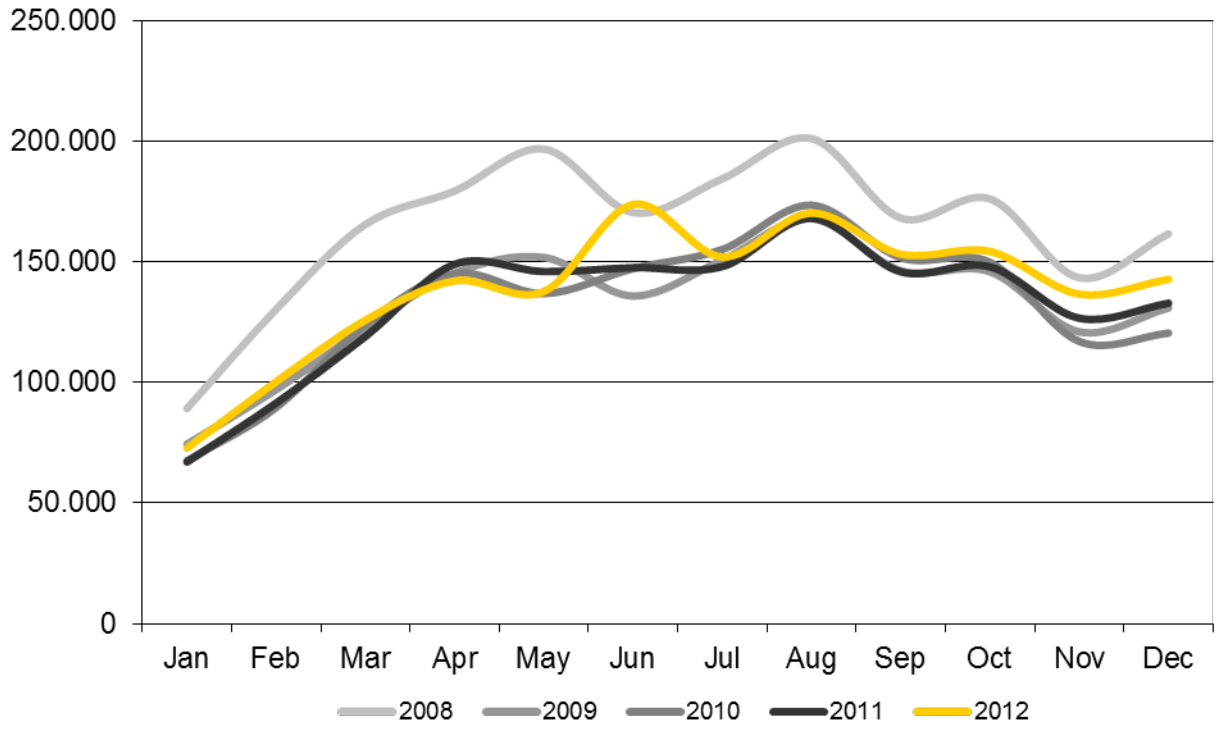
Source: Tourism Flanders based on GDS

Figure 17: British overnights in Antwerp, Ghent, Leuven, Mechelen – seasonality 2012



Source: Tourism Flanders based on GDS

Figure 18: Trend of British overnights in Flanders – seasonality 2008-2012



Source: Tourism Flanders based on GDS

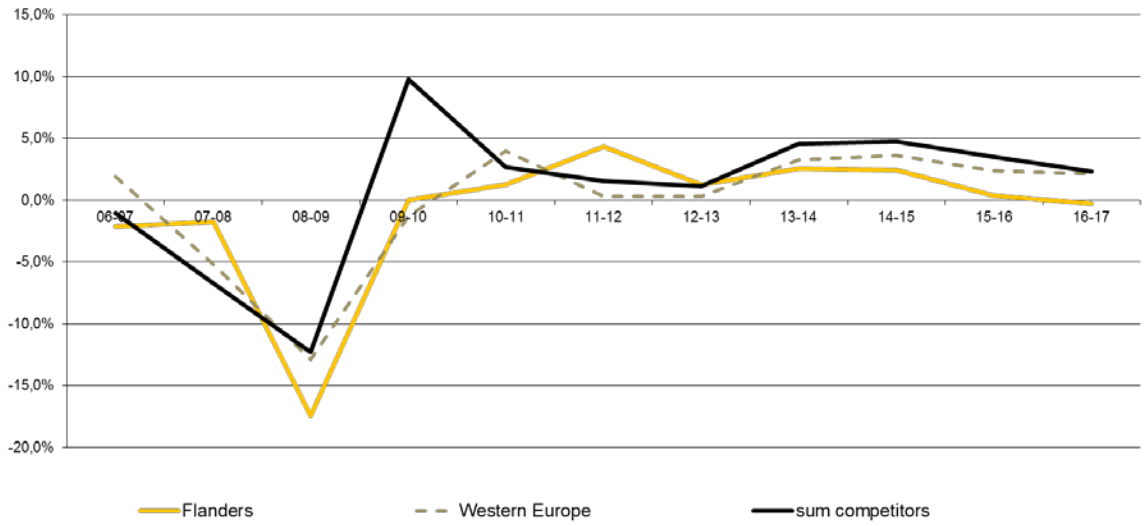
8. Country benchmark

Table 11: Trend and forecast of the British market in Flanders and competitive destinations (2008-2017, x1.000, in arrivals)

destination	2008	2009	2010	2011	2012	*2017*	*2012-2017*
Flanders	932	770	770	779	813	*866*	*+6,5%*
Western Europe	48.228	42.016	41.472	43.118	43.252	*48.555*	*+12,3%*
sum competitors	7.777	6.823	7.490	7.692	7.811	*9.161*	*+17,3%*
Germany	1.968	1.750	1.987	2.055	2.224	*2.232*	*+0,4%*
Netherlands	1.639	1.409	1.556	1.508	1.610	*1.971*	*+22,4%*
Ireland	4.170	3.665	3.948	4.129	3.976	*4.958*	*+24,7%*

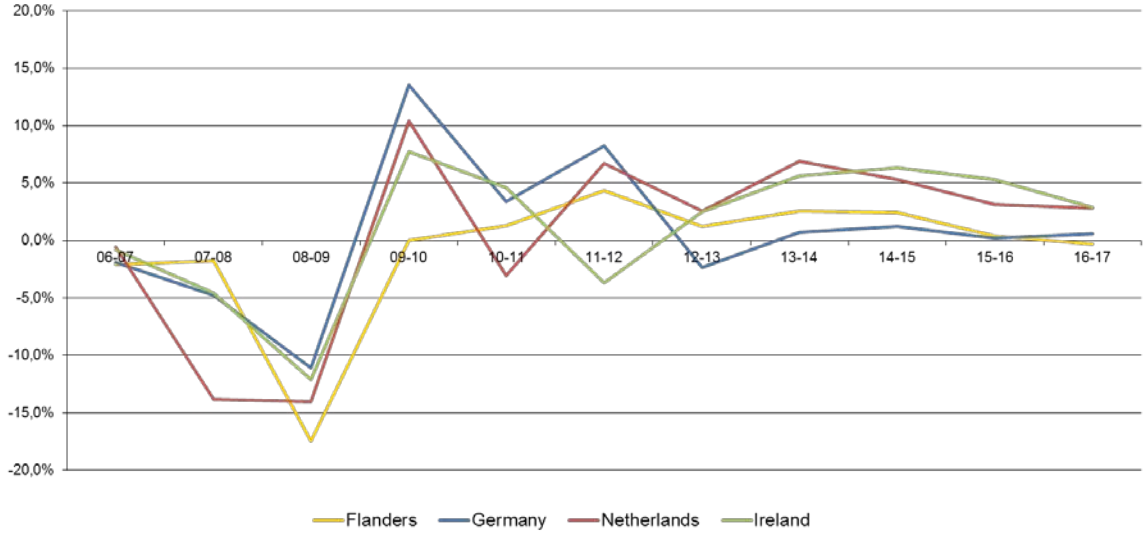
Source: Tourism Flanders based on TDM and GDS

Figure 19: Trend and forecast of the British market in Flanders, Western Europe and competitive destinations (2006-2017, in arrivals)



Source: Tourism Flanders based on TDM and GDS

Figure 20: Trend and forecast of the British market in Flanders and competitive destinations (2006-2017, in arrivals)



Source: Tourism Flanders based on TDM and GDS

B. PROFILE OF THE BRITISH LEISURE MARKET IN FLANDERS

This chapter is based on “the holiday maker in Flanders 2011”, an extensive market study carried out every five years in Flanders. In this section we focus on the main characteristics of the British leisure market in Flanders. We look at the profile, motivations, characteristics of the trip, information source, activities, satisfaction and spending of the foreign tourist in Flanders.

The British market

The British market generates 1,6 million overnight stays in Flanders. 1,1 million of these are overnight leisure stays. However, the trend in the British market has been downward since 2001, with a small recovery in 2011. Two thirds of the overnight stays are in the art cities. The coast receives about 10%.

The British tourists on the coast do not come from any one specific region. 17% are from the South East and 16% from Wales. East Anglia comes third with 14%.

In the art cities the home region of the British tourist is much clearer. 40% live in London or the greater South East. North West England accounts for 14%. Other regions are below 10%.

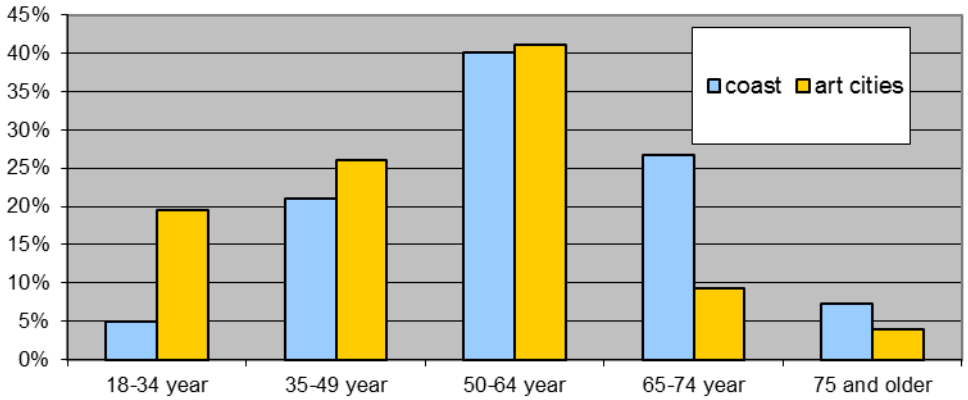
1. Profile

Both on the coast and in the art cities, the surveyed British tourist is among the oldest. On the coast he is an average 57 years old, in the art cities 49, which is three years older than the average age for the destination in question.

The difference in age distribution between the visitor to the coast and the city tripper is also clear among the British tourists. The largest group on the coast is the middle-aged group, with 40%. The 65-74 group come second, with a little over a quarter. Young people are scarce, with a share of 5%. Among no other nationality on the coast are young people so weakly represented and the over-65s so strong.

Among the British tourists in the art cities we find most in the middle-aged group, a good 40% belonging to this category. A little more than a quarter are between 35 and 49, whereas a fifth are under the age of 35. British over-65s are not frequently seen in the art cities. Compared to the other nationalities, the middle-aged are is strongly present. Only among the Americans is their share a little bigger.

Figure 21: Age of the British overnight leisure tourist in Flanders



As can be expected due to their high average age, a large portion of British tourists on the coast belong to a family with a retiree as head of the family. A quarter are white collar employees and 17% are blue collar workers. What stands out compared with the other markets is the very large proportion of blue collar workers. The proportion of retirees is comparable to that for the Luxembourgers and the Belgians, but is a great deal higher than for the neighbouring countries.

In the art cities there are many more different categories of profession. One third of the British heads of the family are white collar employees; almost a quarter are executives, entrepreneurs or practitioners of a liberal profession. Self-employed and retirees each account for one fifth. Blue collar workers are rare, as is the case for most other markets.

The coast and the art cities clearly differ in terms of the educational level of the head of the family. On the coast, one half of the British heads of the family have at most a certificate of primary or lower secondary education. This is twice the average. In no other market is the lowest level of education so strongly evident. Almost one fifth of the British heads of the family on the coast have a university degree.

The art cities tend to attract tourists from families in which the head of the family has been in higher education. More than three quarters have completed further studies, at university or elsewhere.

Table 12: Profession and educational level of head of family of the British overnight leisure tourist in Flanders

Profession of head of family	Coast	Art cities
Blue collar worker	17%	2%
White collar employee	25%	32%
Executive, entrepreneur, liberal profession	10%	24%
Self-employed	5%	20%
Retired early	40%	21%
Other non-working	2%	1%
Total	**100%**	**100%**
Educational level of head of family		
Primary or lower secondary education	50%	7%
Higher secondary education	15%	18%
Higher non-university education	16%	39%
University education	19%	37%
Total	**100%**	**100%**

2. Competitive position and motivation

As with the other nationalities, British tourists have few doubts about their choice of destination. 20% had an alternative for the coast. For the art cities, only 3% considered a different destination.

British tourists give on average 1.8 reasons for holidaying on the coast. At number one, they place the nice holiday atmosphere. One third of the British tourists give this as their motivation. No other nationality cites this reason as much.

This is also the case for number two: the interesting options for going out. The proximity of the Westhoek and its battlefields certainly plays a part in this. The many activities attract about one fifth of the British visitors to the coast. For the British tourist, proximity is much less important than for the other nationalities, because they have a physical barrier to cross, i.e. the Channel.

Needless to say, there are other reasons for visiting the art cities. On average, the tourist gives more reasons: 2.6. The fame of the cities and the fact that they are interesting, with plenty of attractions, are given as reasons one and two. 47% and 45% of the British tourists respectively cite this reason for coming to that particular art city on holiday. The artistic and historical heritage associated with it comes in third place. The enjoyment of a new experience and a recommendation by family and friends play a major role in the decision-making process of the British tourist. In these respects they are close to the averages, but do differ from the other neighbouring countries where past experience, for example, or accessibility, play a greater role. We will also see that British tourists have a lower figure for return visits than the other neighbouring countries.

Figure 22: Top 5 reasons for British tourists visiting the coast

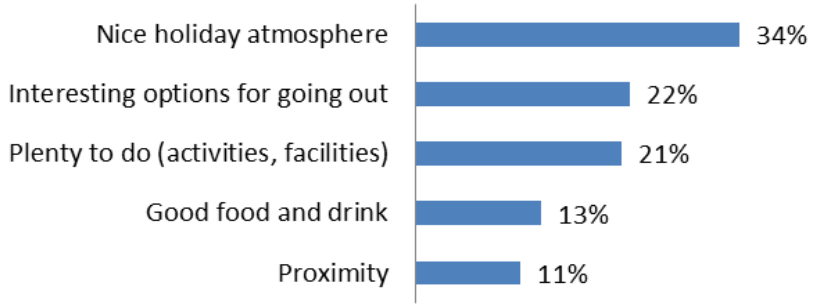
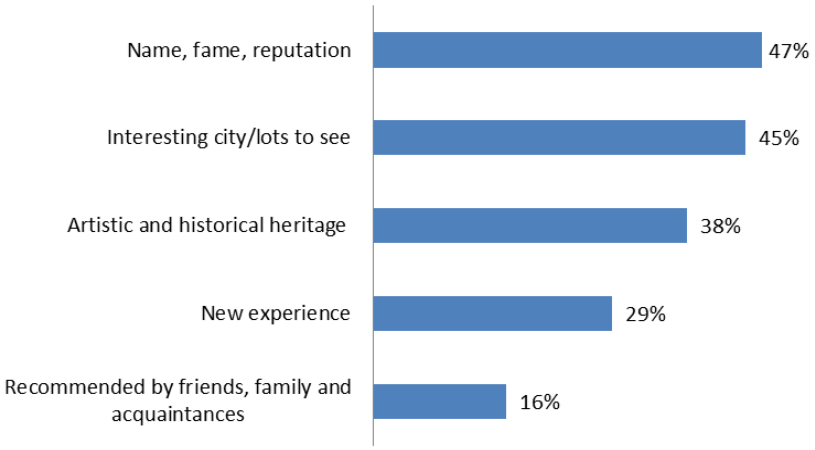


Figure 23: Top 5 reasons for British tourists visiting the art cities



3. Characteristics of the trip

Both the coast and the art cities attract British tourists who are travelling without children. For both destinations this is the case for nine out of ten groups. On the coast, the figure is even slightly lower than it is in the art cities, which is very atypical compared to the other markets at the seaside. Others are much more often in the company of children, on average 41%. But, given the higher age of the British tourist on the coast, this is less surprising.

The average British family on the coast is slightly larger than in the art cities. The opposite is true when it comes to group size. This implies that the British tourist on the coast comes mainly as a couple, whereas in the cities he visits with friends or other members of the family.

Table 13: Travel group of the British overnight leisure tourist in Flanders

	Coast	Art cities
Family/group with children	8%	6%
Family/group without children	92%	94%
Total	**100%**	**100%**
Average family size	1.9	1.8
Average group size	2.1	2.3

Under mode of transport the survey asks for the method of transport used to travel the greatest portion of the distance. For the coast, very strikingly, the coach dominates, being used for 60% of all British holidays to the coast. The rest is almost exclusively by car, with only a small proportion by high speed train. This differs completely from all the other visitors to the coast, which is, of course, to do with the specific island situation of the British market.

The distribution for the art cities is completely different. Only the share that arrives by car, one third, is comparable with the share at the coast. The good high speed train connection with Brussels is not lacking in its effect. It is used by 42% of the British tourists. 16% come by aircraft. The share arriving by coach is confined in this case to 7%.

Table 14: Transport taken by the British overnight leisure tourist to Flanders

	Coast	Art cities
Car	30%	33%
(Ordinary) train	0%	2%
HST/Thalys/Eurostar	7%	42%
Coach	60%	7%
Aircraft	0%	16%
Camper van	0%	0%
Other	2%	0%
Total	**100%**	**100%**

Just about all British tourists, whether they go to the coast or the art cities, book their accommodation in advance. Agents are by far and away the main means for both destinations, with shares of 70% and 73% respectively. British tourists are much less likely to book directly via the accommodation owners than are other neighbouring countries. The agent they choose does, however, differ strongly between the two destinations. For the coast the traditional travel agent dominates. 61% of all British stays on the coast are booked through a travel agent or tour operator. In this area, the booking pattern of the British tourist on the coast is atypical. As regards the city trip, the distribution between the travel agency and the booking sites tends to be even, albeit with a slight leaning towards the latter. Compared with the other neighbouring countries, travel agents and tour operators have a large share when it comes to stays in the art cities. On the coast, 37% book through a website, in the cities this share is higher: 63%.

Table 15: Booking of accommodation by the British overnight leisure tourist in Flanders

	Coast	Art cities
Not booked in advance	1%	5%
Directly through the operator	29%	22%
Through an agent:	70%	73%
Booking site, online travel agent	4%	34%
Travel agency, tour operator	61%	30%
Tourist rental agency	0%	0%
Other	4%	8%
Total	**100%**	**100%**

4. Information sources

In the art cities, the British tourists do much more research in advance than on the coast. In the art cities 89% look for information in advance and on the coast 69%. 31% of the British visitors to the coast rely on previous experience. The Internet is used most for a stay at the seaside. 35% of the British visitors to the coast who research in advance browsed the web. In second place come brochures and printed matter, with 21%. This is of importance only among the British tourists. 17% consult informal channels and 11% consult other channels, mainly the weather forecast. More sources are consulted when it comes to holidays to the art cities. More than half of those who do their research in advance go in search of information online. Here too, brochures and other printed matter come in second place, followed closely by info from friends, family and acquaintances, respectively 28% and 27%. The press and travel guides each account for 13%. This places the British tourist in the group of tourists for whom the travel guide is relevant in preparing for a city trip.

Table 16: Information sources used by the British overnight leisure tourist in Flanders

	Coast	Art cities
No research/Past experience	31%	12%
Research in advance	69%	89%
Total	**100%**	**100%**
Details checked in advance (overall basis):		
Online information and websites	35%	54%
TV, radio or press	3%	13%
Informal channels (family, friends and acquaintances)	17%	27%
Brochures, folders, printed matter	21%	28%
Travel guide, tourist guide	1%	13%
Other information	11%	2%

5. Activities

British visitors to the coast do much fewer daily activities than the others. With an average of 4 they are right at the bottom of the list. The most popular activity is walking on the seafront (75%). Enjoying a beverage on a café terrace or visiting a café is also a favourite activity (72%). Only the Luxembourgers cite this more. 62% of the British tourists go shopping during their stay at the seaside and exactly half cite a visit to a restaurant as an activity.

Aside from frequent activities, there are other activities that holidaymakers do once or twice during their stay. British tourists like to use their holiday location as a base for further exploration. This does not make them an exception, but British tourists do differ in terms of destination. One fifth of the British visitors to the coast make a trip to another coastal resort. This is few, the percentage varies between 45% and 58% for the other nationalities. British tourists opt, on the other hand, for a trip into the hinterland. 53% do this, which is much higher than the other markets, where the minimum percentage is 11% and the maximum 31%. Interest in the WWI heritage in the Westhoek undoubtedly plays an important role here.

On average the British tourist engages in 6.3 activities during his stay in the art cities. Almost everyone walks around the city centre, about four in five visit monuments or historical buildings. Similarly, visits to churches and cathedrals are also popular. Three quarters also enjoy a beverage on a café terrace. No other tourist enjoys enjoying a beverage on a café terrace as much. What stands out in comparison to the other nationalities is the popularity of boat trips. A quarter of the British tourists in the art cities do this, in Bruges or Ghent of course. This share is equalled only by the Americans.

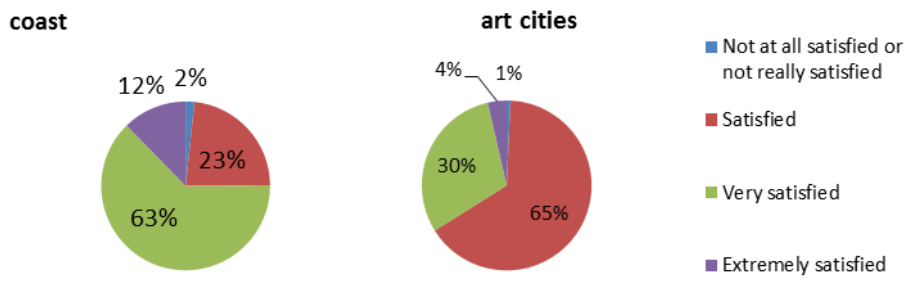
From an art city it is also possible to visit another place (33%). One quarter of all British city trippers has visited an art city. The coast attracts just a small percentage (4%). What is striking compared with the other nationalities is that a not-inconsiderable portion of the British tourists (7%) goes to other destinations in Flanders too. Here too, the Westhoek plays a major role.

6. Satisfaction and return visit

British visitors to the coast are clearly satisfied with their holiday. On average they give 3.9 out of 5. This is the highest satisfaction score of all the tourists on the coast. In general, three quarters say they are very satisfied to extremely satisfied, a mere 2% not satisfied.

In the art cities the tourists are a little less satisfied, or they have a more critical outlook. The score given by the British tourists comes to 3.4 out of 5, comparable with the average tourist in the art cities. 34% of British tourists are very satisfied to extremely satisfied. The share that is not satisfied is no more than 1%.

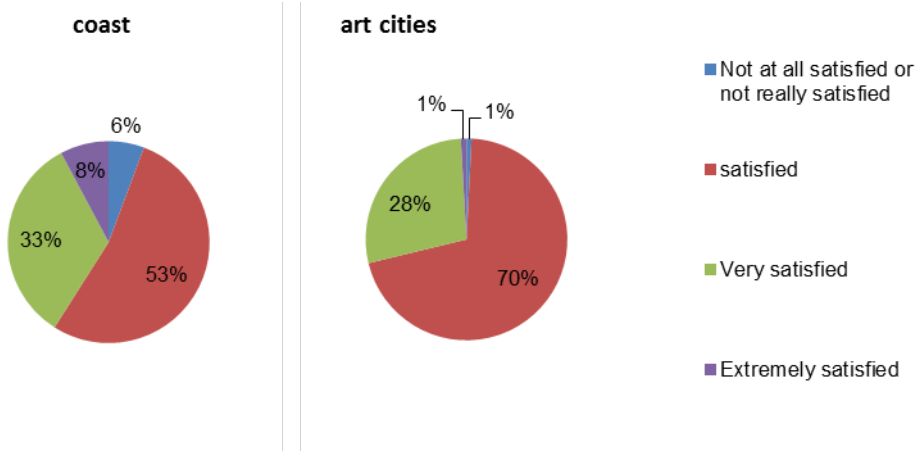
Figure 24: Satisfaction of the British overnight leisure tourist in Flanders



British tourists can be said to be satisfied with the value they get for the money they spend on their accommodation on the coast. They give 3.4 out of 5. Four out of ten are more than satisfied and 53% are satisfied. The share not satisfied with the value for money of their accommodation is no more than 6%.

British tourists in the art cities were asked to evaluate the value for money at their destination. They gave an average of 3.3 out of 5. 70% of the British city trippers were satisfied and 29% were very satisfied to extremely satisfied with what they got for their money. The share that is not satisfied is negligible.

Figure 25: Evaluation of value for money* by the British overnight leisure tourist in Flanders



*at the coast only for accommodation

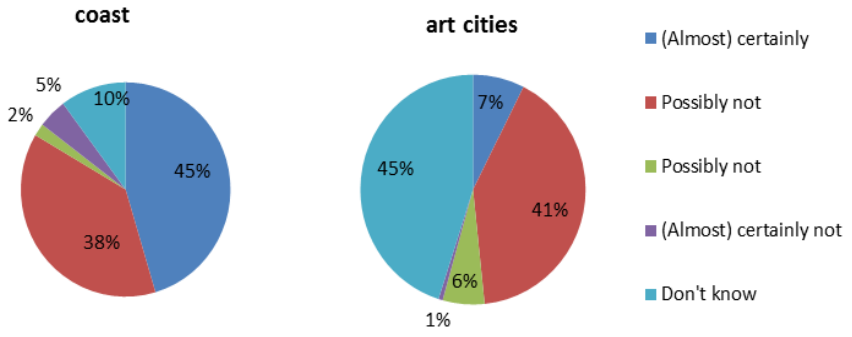
On the coast, more than half of the British tourists had holidayed there before in the last three years. Compared with the other nationalities this is fairly low; only the Dutch tourist has a lower return visit. Art cities have a less loyal public. A quarter had holidayed there before in the last five years. The British tourists seem less loyal to our art cities than the other neighbouring countries.

Table 17: Return visit by the British overnight leisure tourist in Flanders

Coast	54%	in the last 3 years
Art cities	25%	in the last 5 years

The intentional return visit gives a comparable picture. 83% of British tourists on the coast say they will possibly to almost certainly come back on holiday in the next three years. Although this is a high percentage, only the Dutch tourists are less certain that they will return. One tenth of the British tourists were undecided. The less loyal public in the art cities also translates into a lower intention of a return visit. Just under half of the British city trippers will possibly or almost certainly return. An amount almost as large said that they did not know.

Figure 26: Return visit* of the British overnight leisure tourist in Flanders



*within 3 years

7. Spending

The British tourist on the coast spends 95 euros per person per night. This is 33 euros more than the general average. The British tourist's money largely goes on meals, food and drinks, and secondly on accommodation. Only the Luxembourgers spend more. Both markets stay mostly in hotels. The British city tripper spends 136 euros per person per night. Here too, the majority goes on food, followed by accommodation. However, the amount spent on shopping is also not negligible. No other spending category stands out against the other markets.

Table 18: Average spend of the British overnight leisure tourist in Flanders

Spending per person per night (euro)	Coast	Art cities
Accommodation	37	45
Meals, food and drinks	46	53
Attractions and entertainment	2	9
Shopping	9	25
Travel	1	4
Other spending	0	0
Total	**95**	**136**

C. CONCEPTS AND DEFINITIONS

In Belgium, the FPS Economy, Directorate-general Statistics is authorised to demand from all commercial lodging facilities each month the number of persons who stayed in the facility for payment. Two basic indicators are obtained in this way: the number of arrivals and the number of overnight stays.

Along with the division by **accommodation form** (hotels, camp sites, holiday parks and accommodations for target groups), the Directorate-general Statistics' statistics give **volume characteristics** (the number of arrivals and overnight stays), **trip characteristics** (length of stay, motive of stay, period of stay, place of stay) and **personal characteristics** (country of origin of the residential tourist).

Roughly speaking, the number of **arrivals** corresponds with the number of residential tourists, with the qualification that each tourist is counted as an ´arrival´ each time he or she uses a new accommodation. For this reason, the number of arrivals does not precisely correspond to the number of holidays or business trips in our country. An example: hikers can generate several arrivals during 1 holiday, by staying in different successive lodging facilities. The volume of **overnight stays** is the sum of all overnight stays which are coupled with the registered arrivals.
The data in this report are excluding overnights in accommodations for rent.

'Flanders'= Brussels + Flemish Region.

For more detailed figures see 'Tourism in figures **XL**' www.toerismevlaanderen.be/figures (in English), www.toerismevlaanderen.be/cijfers (Dutch) or contact kennisbeheer@toerismevlaanderen.be.