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Flanders
State of
the Art

Tourism in Figures

2013

the Danish market in Flanders

VISITFLANDERS

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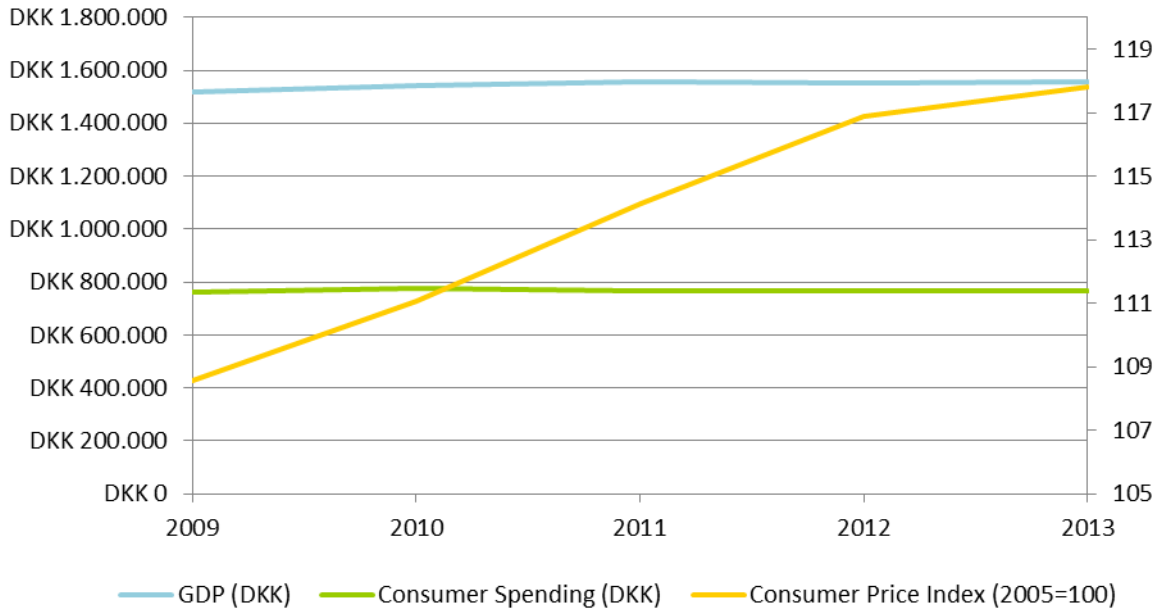
A. ECONOMIC INDICATORS

Table 1: Trend of the Danish economy 2009-2013

	2009	2010	2011	2012	2013	09-13
GDP, real (x1000 000 DKK)	1.518.910	1.540.120	1.556.500	1.550.910	1.557.620	+2,5%
Consumer spending (x1000 000 DKK)	763.844	774.102	768.541	767.662	767.795	+0,5%
Consumer Price Index	108,6	111,1	114,1	116,9	117,8	+9,2%

Source: VISIT**FLANDERS** *based on TDM*

Figure 1: Trend of the Danish economy 2009-2013



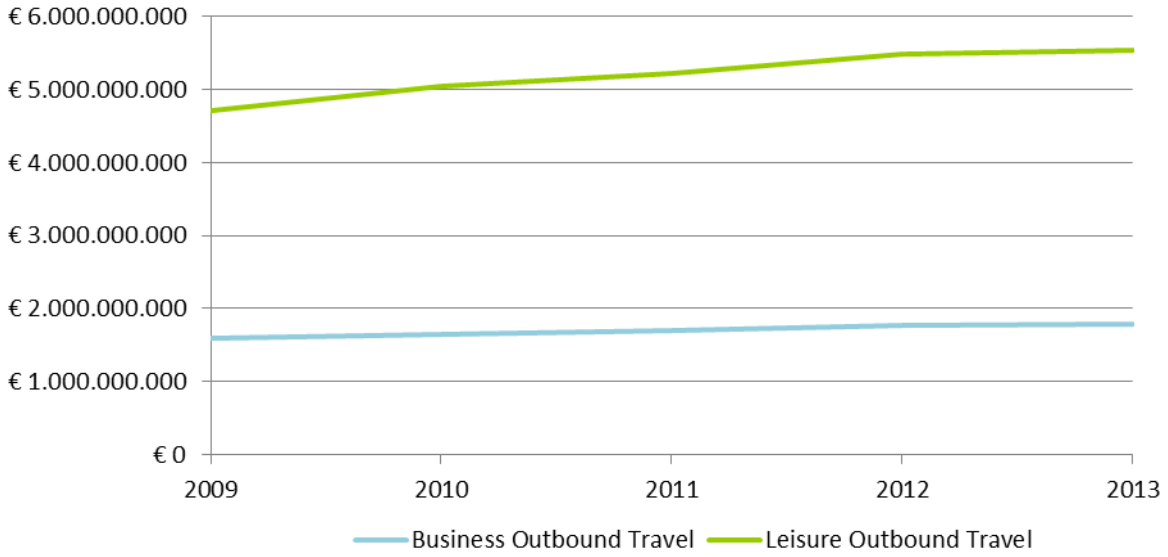
Source: VISIT**FLANDERS** *based on TDM*

Table 2: Trend of the Danish population 2009-2013

	2009	2010	2011	2012	2013	09-13
Population	5.526.600	5.550.920	5.573.060	5.594.340	5.614.650	+1,6%
Population, 65+	16,2%	16,6%	17,1%	17,7%	18,0%	+1,8*
Unemployment rate	4,8%	6,1%	6,0%	6,1%	5,8%	+1,0*

** in percentage point*
Source: VISIT **FLANDERS** *based on TDM*

Figure 2: Danish Outbound Travel 2009-2013 (spending, euro)



Source: VISIT**FLANDERS** *based on TDM*

B. THE DANISH MARKET IN FLANDERS

1. Key figures

Table 3: Total foreign and Danish market in Flanders 2013

	Overall total foreign travellers	Danish travellers	% Danish	Ranking Danish Market
arrivals	6.488.545	52.186	0,8%	15th
overnight stays	13.742.727	104.835	0,8%	17th
length of stay (nights)	2,1	2,0		

Source: VISIT**FLANDERS** *based on GDS*

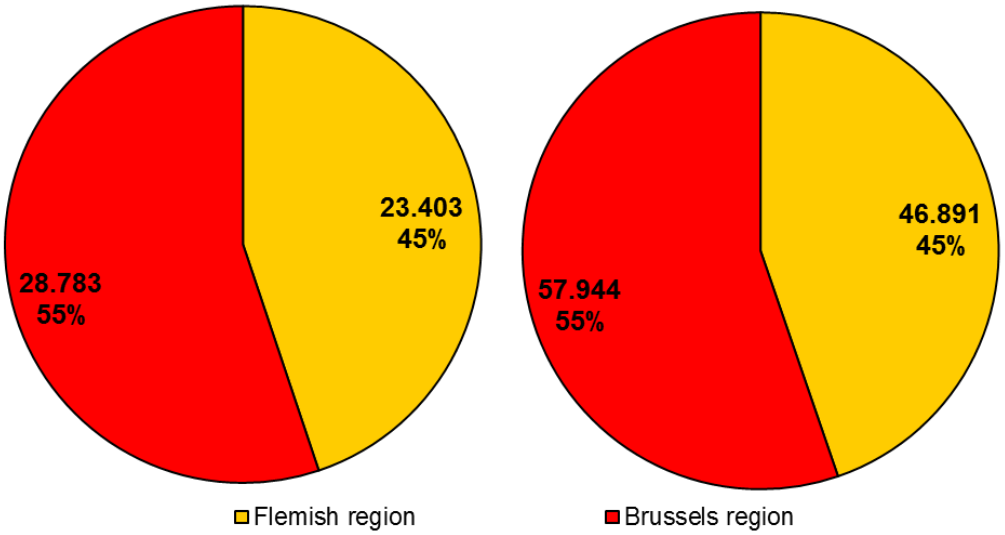
2. Distribution within Flanders

Table 4: The Danish market in Flanders by region 2013

	arrivals	%	overnights	%
Flemish region	23.403	45%	46.891	45%
Brussels region	28.783	55%	57.944	55%
Flanders	**52.186**	**100%**	**104.835**	**100%**

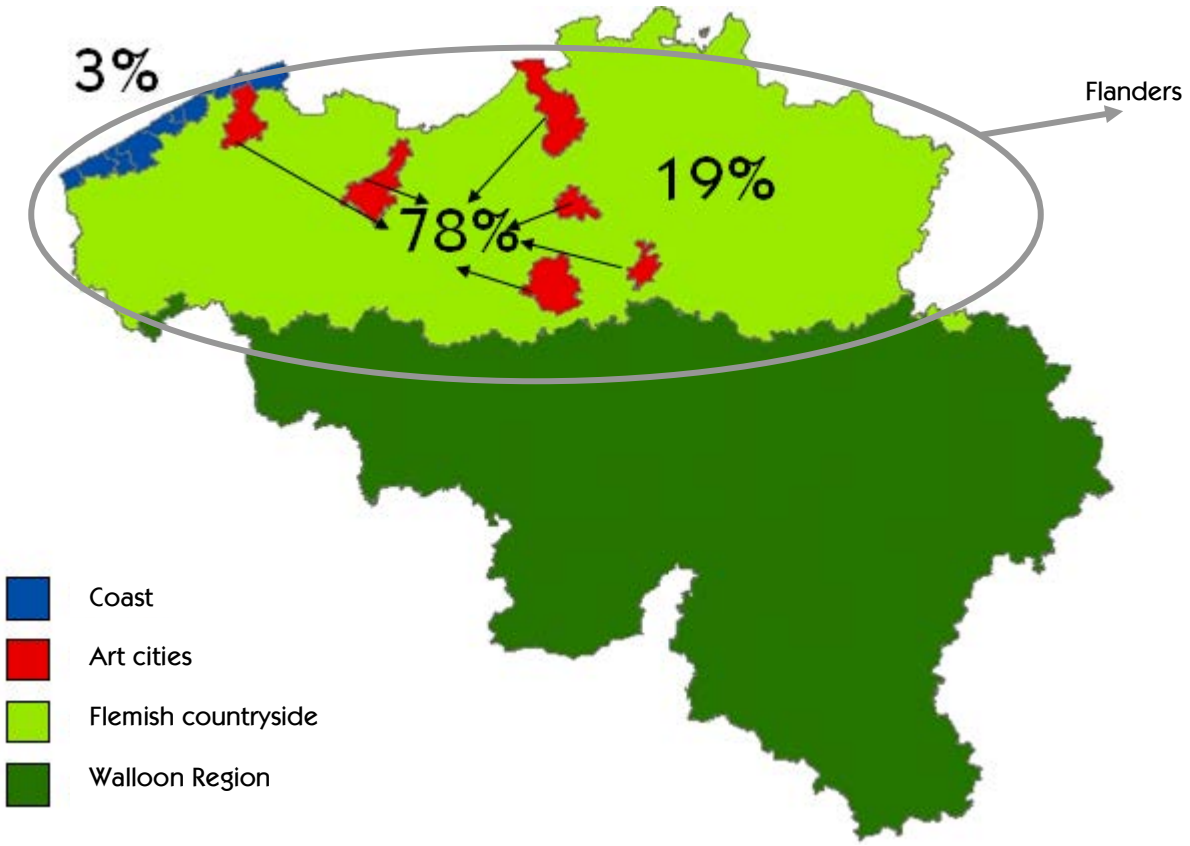
Source: VISIT **FLANDERS** *based on GDS*

Figure 3: The Danish market in Flanders by region 2013 (arrivals (left) and overnights (right))



Source: VISIT**FLANDERS** *based on GDS*

Figure 4: Danish overnights in Flanders 2013



Source: VISIT**FLANDERS** *based on GDS*

Table 5: The Danish market in Flanders by destination 2013

	overnights	%
Coast	3.125	3%
Art cities	82.184	78%
Flemish countryside	19.526	19%
Flanders	**104.835**	**100%**

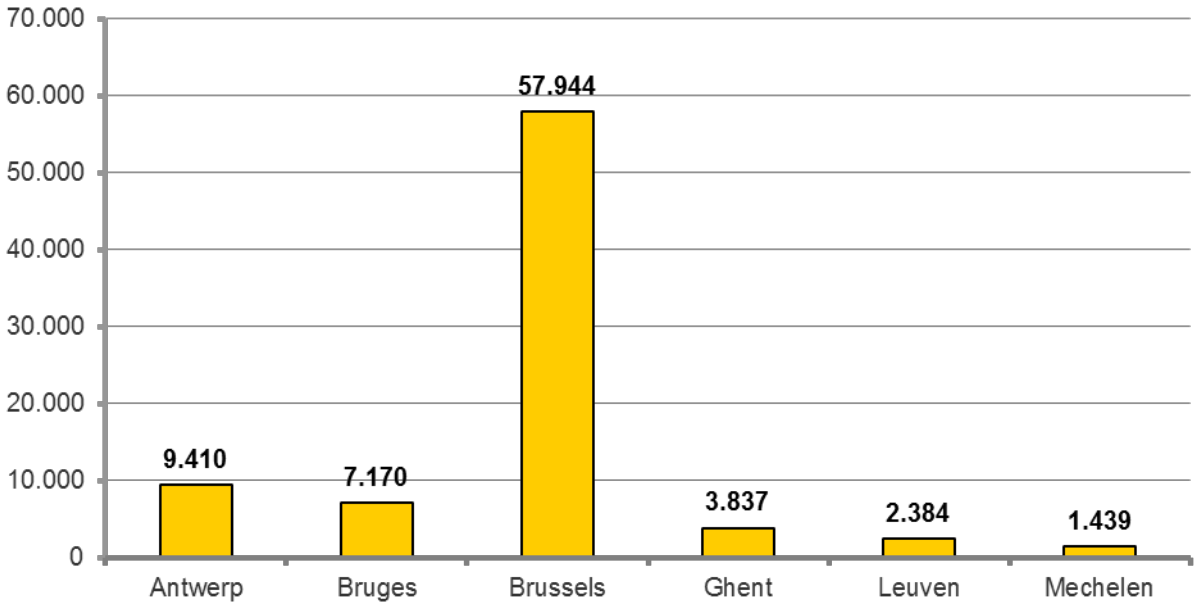
Source: VISIT**FLANDERS** *based on GDS*

Table 6: The Danish market in the Art cities 2013

	overnights	%
Antwerp	9.410	11%
Bruges	7.170	9%
Brussels	57.944	71%
Ghent	3.837	5%
Leuven	2.384	3%
Mechelen	1.439	2%
Art cities	**82.184**	**100%**

Source: VISIT**FLANDERS** *based on GDS*

Figure 5: Danish overnights in the Art cities 2013



Source: VISIT**FLANDERS** *based on GDS*

3. Trends

Table 7: Trend of Danish overnights, arrivals and average length of stay in Flanders 2004-2013

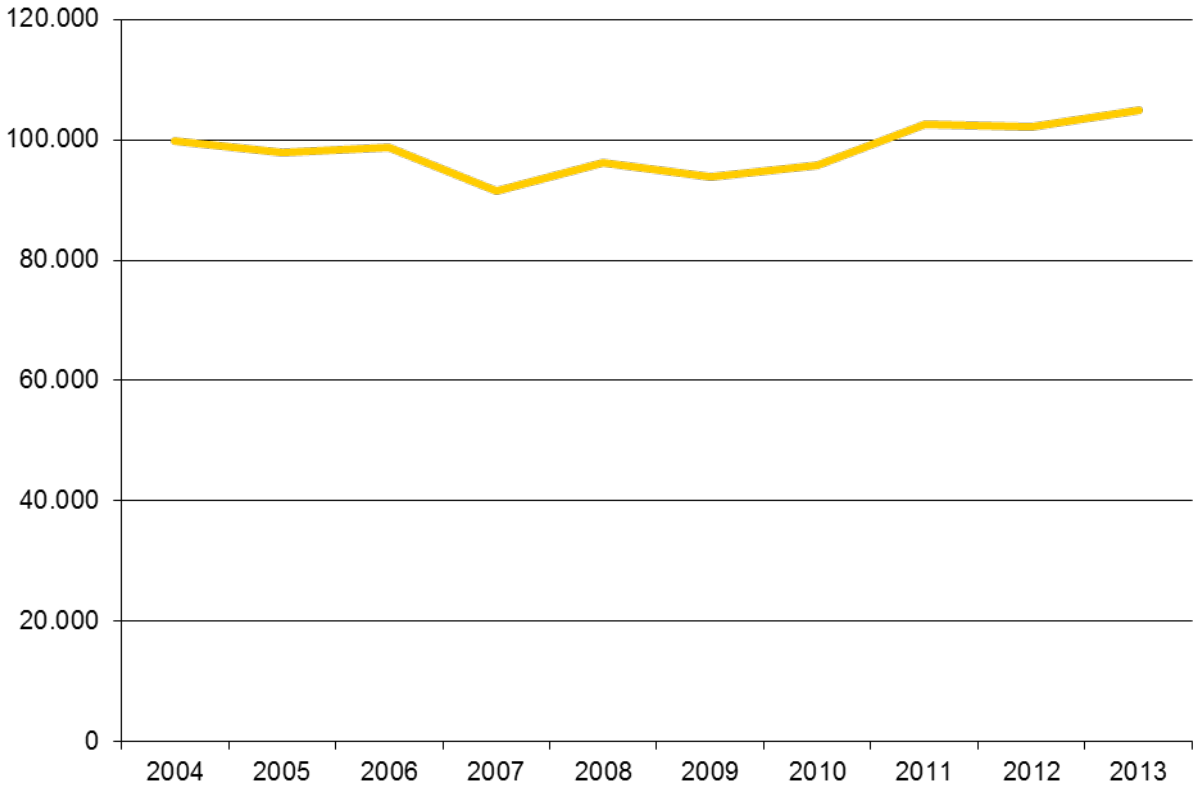
	2004	2005	2006	2007	2008	2009	2010	2011	2012*	2013	04-13
Overnights (x1.000)	100	98	99	91	96	94	96	103	102	105	+5,0%
Arrivals (x1.000)	50	49	51	47	48	47	48	51	52	52	+4,3%
Aver. length of stay**	2,00	1,98	1,95	1,95	1,98	2,00	1,99	2,00	1,95	2,01	+0,6%

Source: VISIT**FLANDERS** *based on GDS*

**B&Bs included*

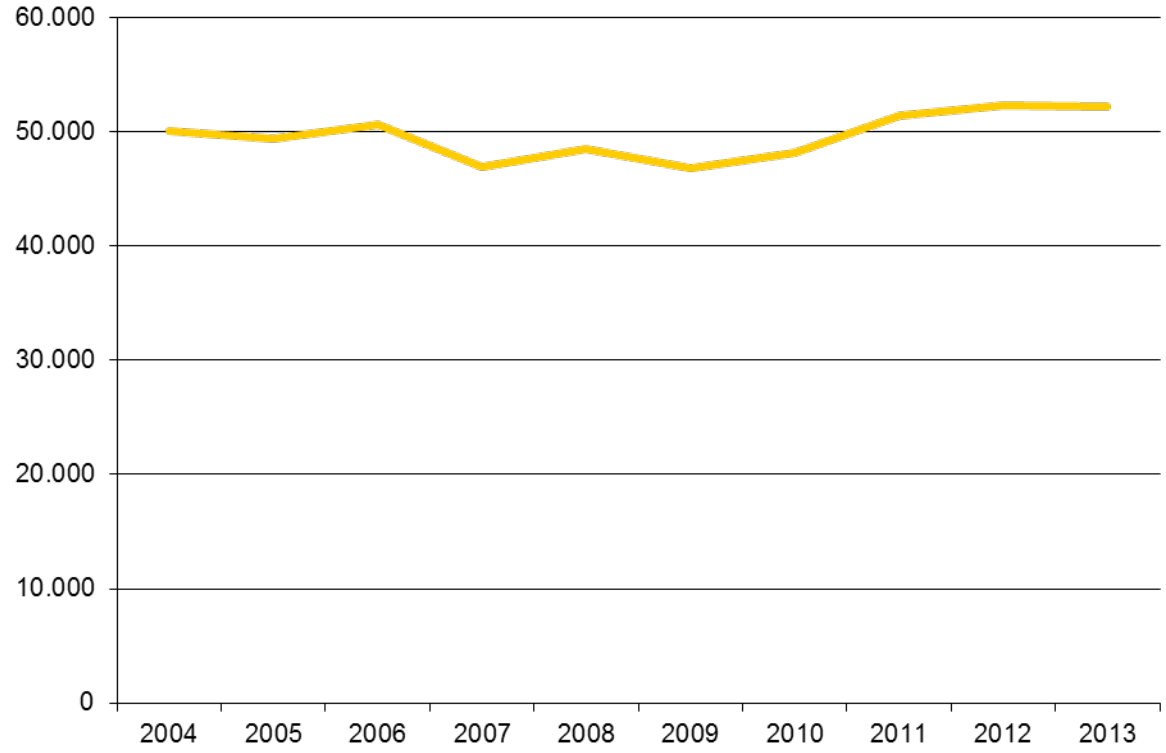
***nights*

Figure 6: Trend of Danish overnights in Flanders 2004-2013



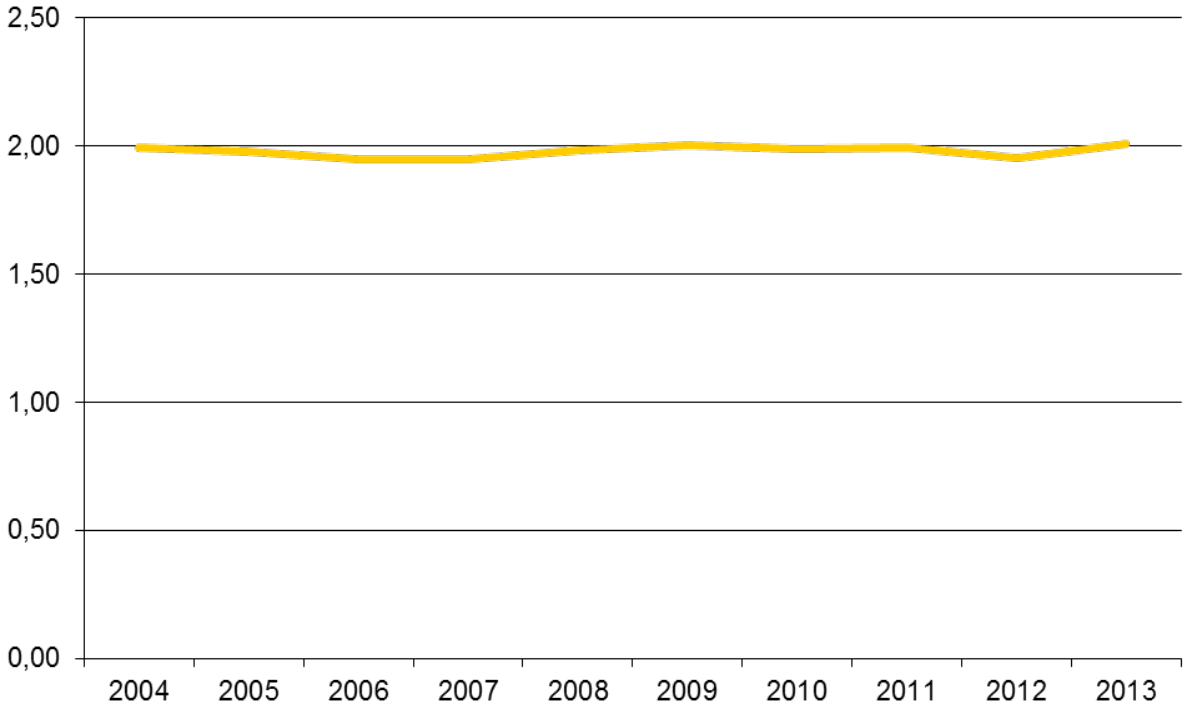
Source: VISIT**FLANDERS** *based on GDS*

Figure 7: Trend of Danish arrivals in Flanders 2004-2013



Source: VISIT**FLANDERS** *based on GDS*

Figure 8: Trend of the average length of stay of Danes in Flanders 2004-2013



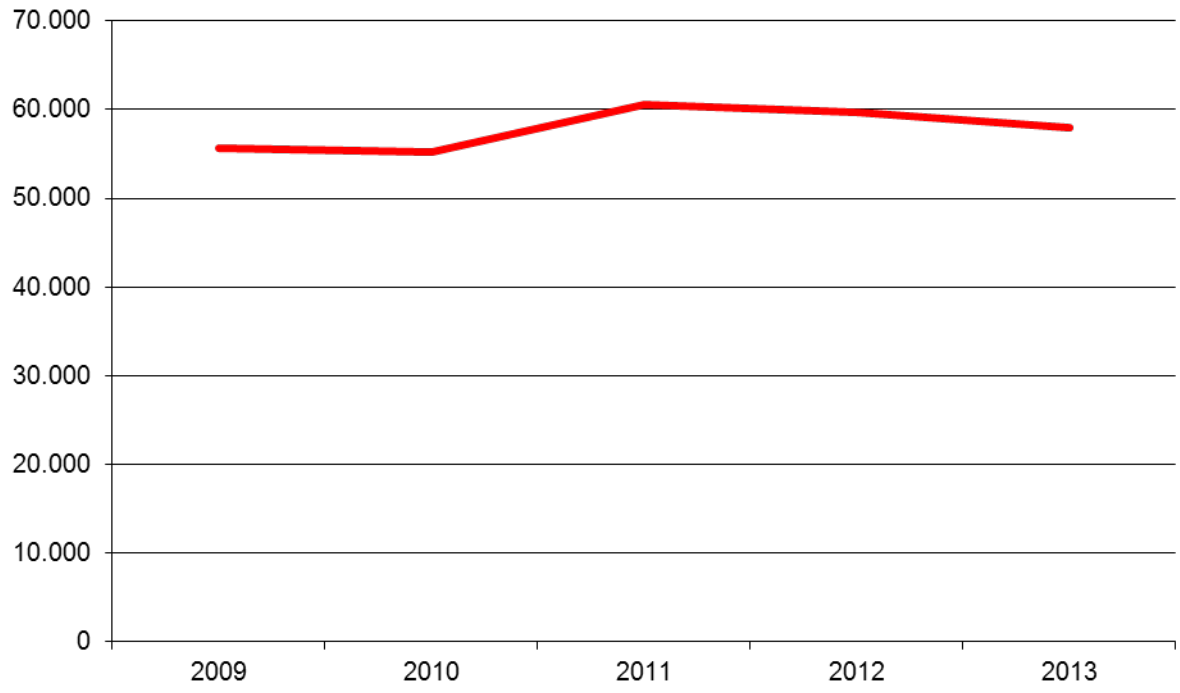
Source: VISIT**FLANDERS** *based on GDS*

Table 8: Trend of Danish overnights in Flanders 2009-2013

	2009	2010	2011	2012*	2013	09-13
Coast	2.113	2.721	1.974	1.975	3.125	+47,9%
Art cities	72.328	74.825	82.106	82.723	82.184	+13,6%
Antwerp	6.453	7.392	8.094	9.122	9.410	+45,8%
Bruges	5.516	5.724	7.361	6.080	7.170	+30,0%
Brussels	55.660	55.180	60.516	59.583	57.944	+4,1%
Ghent	3.092	4.675	3.669	4.536	3.837	+24,1%
Leuven	893	992	1.820	2.387	2.384	+167,0%
Mechelen	714	862	646	1.015	1.439	+101,5%
Flemish countryside	19.318	18.141	18.515	19.085	19.526	+1,1%
Flanders	**93.759**	**95.687**	**102.595**	**103.783**	**104.835**	**+11,8%**

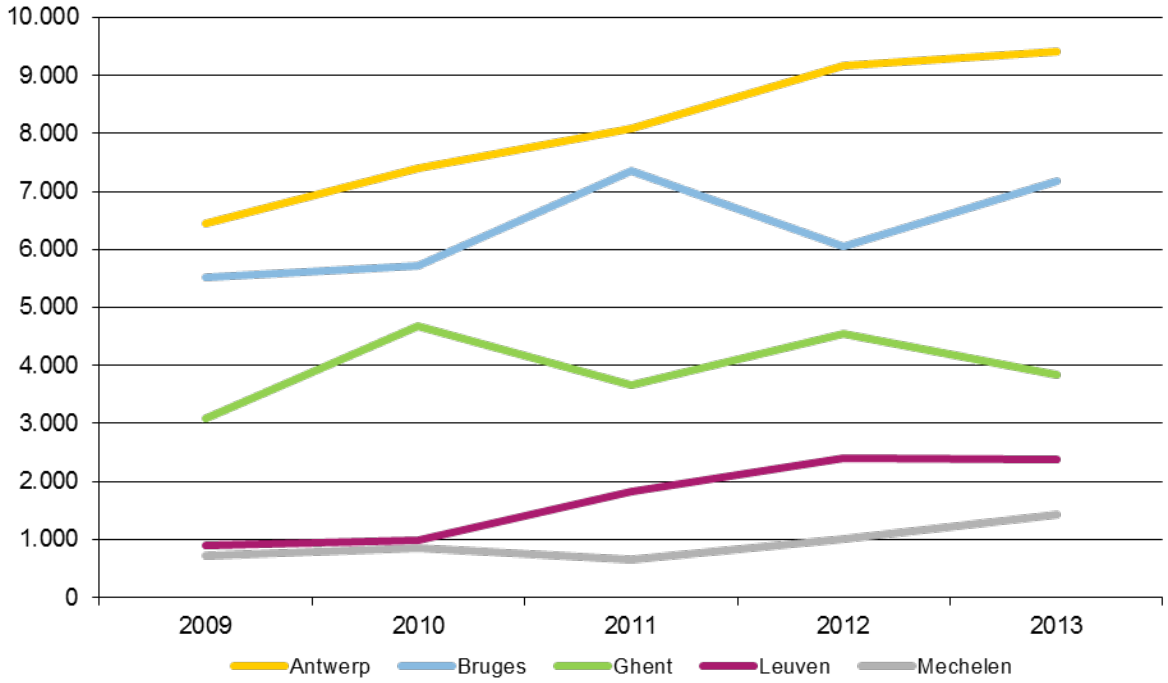
Source: VISIT**FLANDERS** *based on GDS* **includes B&Bs*

Figure 9: Trend of Danish overnights in Brussels 2009-2013



Source: VISIT**FLANDERS** *based on GDS*

Figure 10: Trend of Danish overnights in Antwerp, Bruges, Ghent, Leuven, Mechelen 2009-2013



Source: VISIT**FLANDERS** *based on GDS*

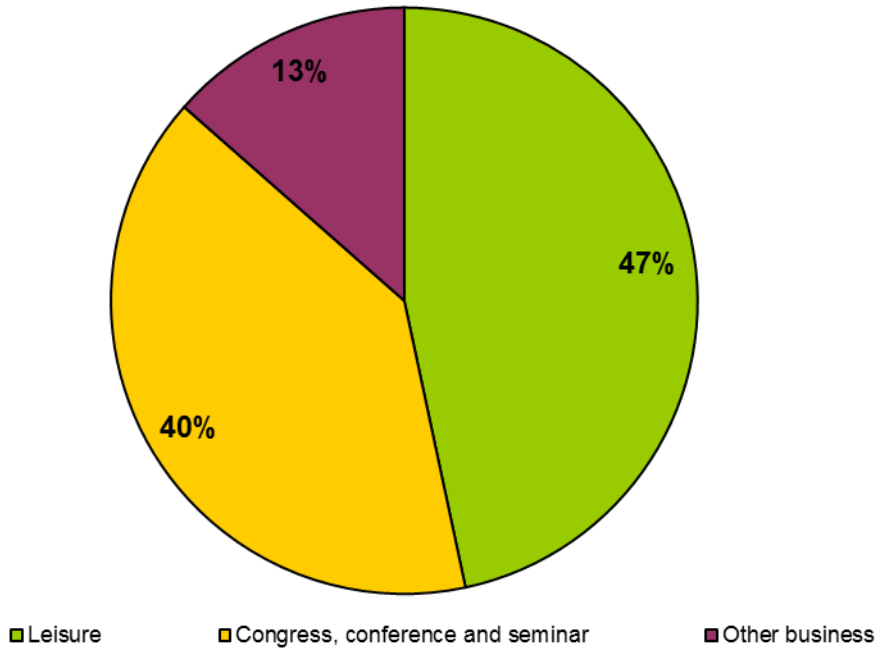
4. Motive of stay

Table 9: The Danish market in Flanders by motive of stay 2013 (overnights)

	Leisure		Congress, conference and seminar		Other business		Total	
Coast	2.557	82%	459	15%	89	3%	3.125	100%
Art cities	36.239	44%	36.135	44%	9.810	12%	82.184	100%
Antwerp	5.711	61%	2.606	28%	1.093	12%	9.410	100%
Bruges	6.384	89%	602	8%	184	3%	7.170	100%
Brussels	21.06	36%	30.563	53%	6.313	11%	57.944	100%
Ghent	1.674	44%	1.350	35%	813	21%	3.837	100%
Leuven	822	34%	730	31%	832	35%	2.384	100%
Mechelen	580	40%	284	20%	575	40%	1.439	100%
Flemish countryside	10.091	52%	5.175	27%	4.260	22%	19.526	100%
Flanders	**48.907**	**47%**	**41.769**	**40%**	**14.159**	**14%**	**104.835**	**100%**

Source: VISIT**FLANDERS** *based on GDS*

Figure 11: The Danish market in Flanders by motive of stay 2013 (overnights)



Source: VISIT**FLANDERS** *based on GDS*

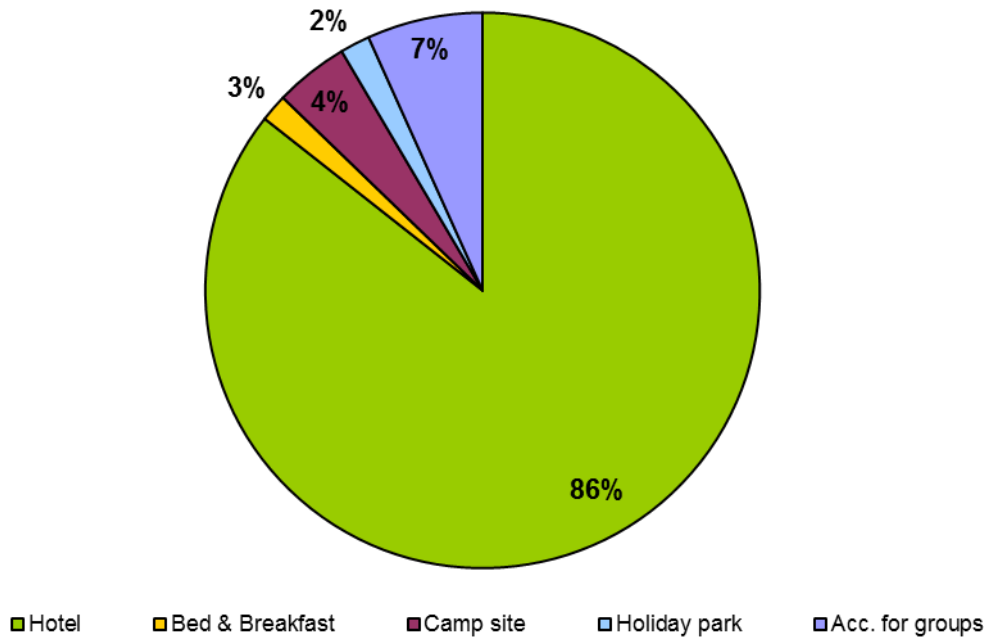
5. Type of accommodation

Table 10: The Danish market in Flanders by type of accommodation 2013 (overnights)

	Coast	%	Art cities	%	Flemish countryside	%	Flanders	%
Hotel	2.152	69%	74.759	91%	12.837	66%	89.748	86%
Bed & Breakfast	24	1%	756	1%	895	5%	1.675	2%
Camp site	783	25%	729	1%	3.002	15%	4.514	4%
Holiday park	82	3%	0	0%	1.743	9%	1.825	2%
Acc. for groups	84	3%	5.940	7%	1.049	5%	7.073	7%
Total	**3.125**	**100%**	**82.184**	**100%**	**19.526**	**100%**	**104.835**	**100%**

Source: VISIT**FLANDERS** *based on GDS*

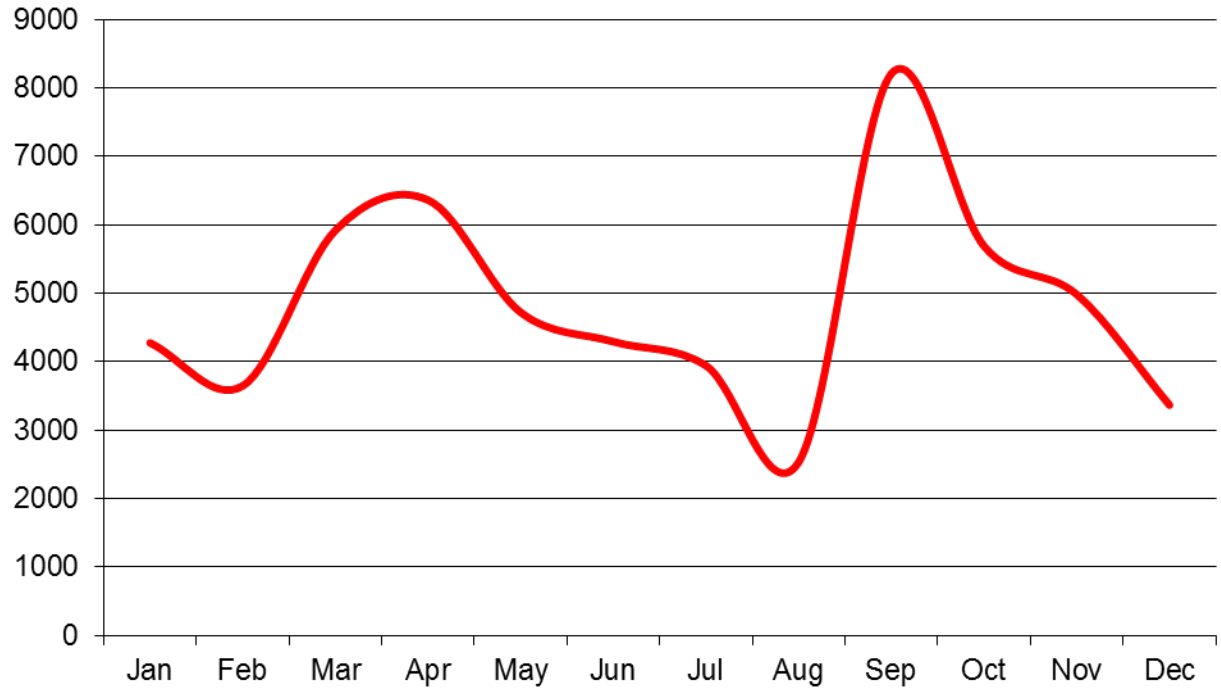
Figure 12: The Danish market in Flanders by type of accommodation 2013 (overnights)



Source: VISIT**FLANDERS** *based on GDS*

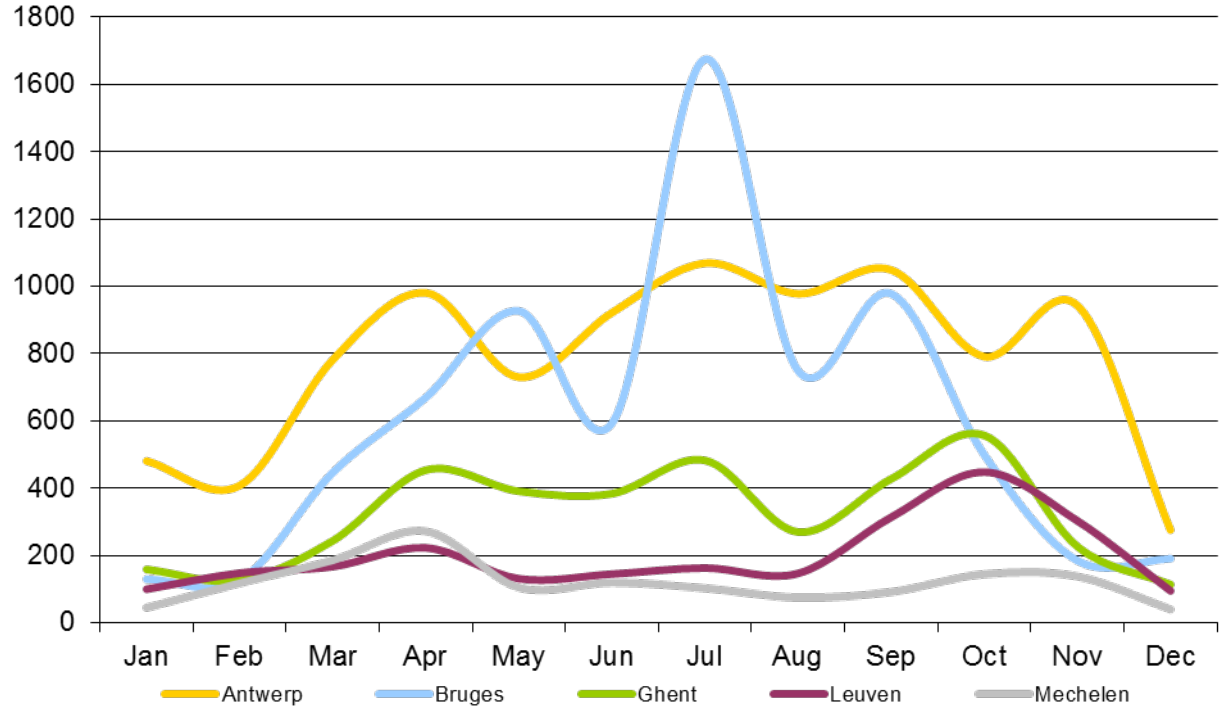
6. Seasonality

Figure 13: Danish overnights in Brussels – seasonality 2013



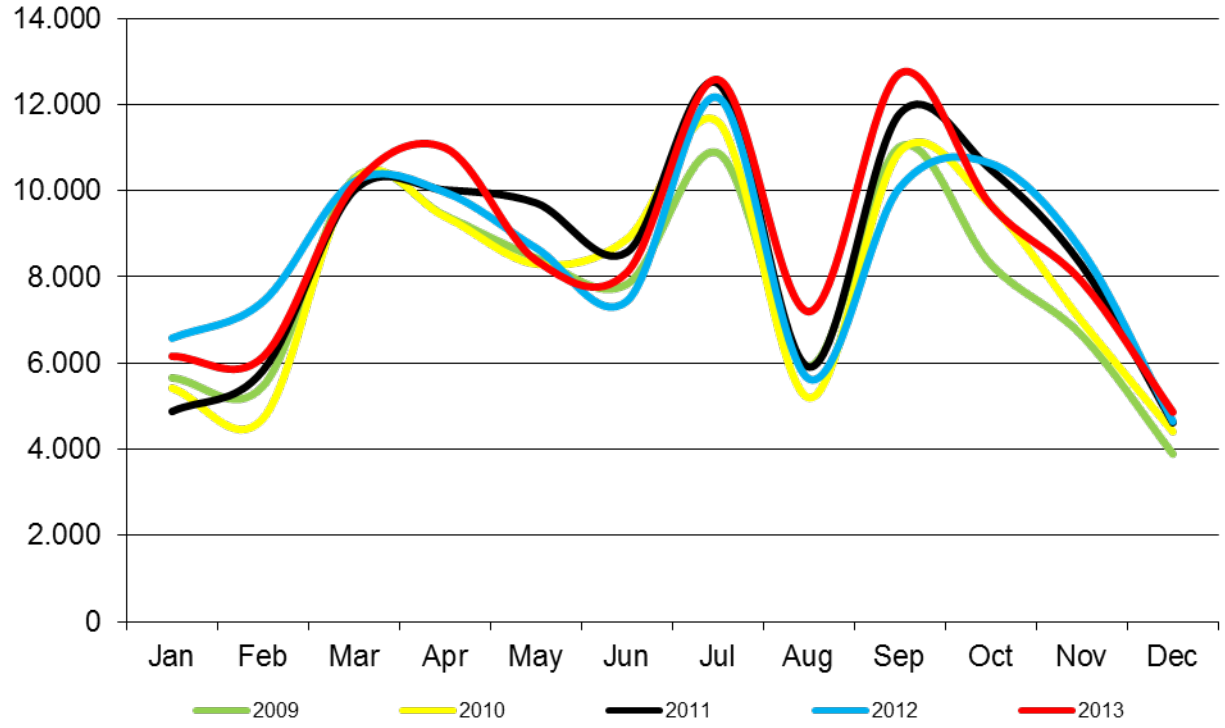
Source: VISIT**FLANDERS** *based on GDS*

Figure 14: Danish overnights in Antwerp, Bruges, Ghent, Leuven, Mechelen – seasonality 2013



Source: VISIT**FLANDERS** *based on GDS*

Figure 15: Trend Danish overnights in Flanders – seasonality 2009-2013



Source: VISIT**FLANDERS** *based on GDS*

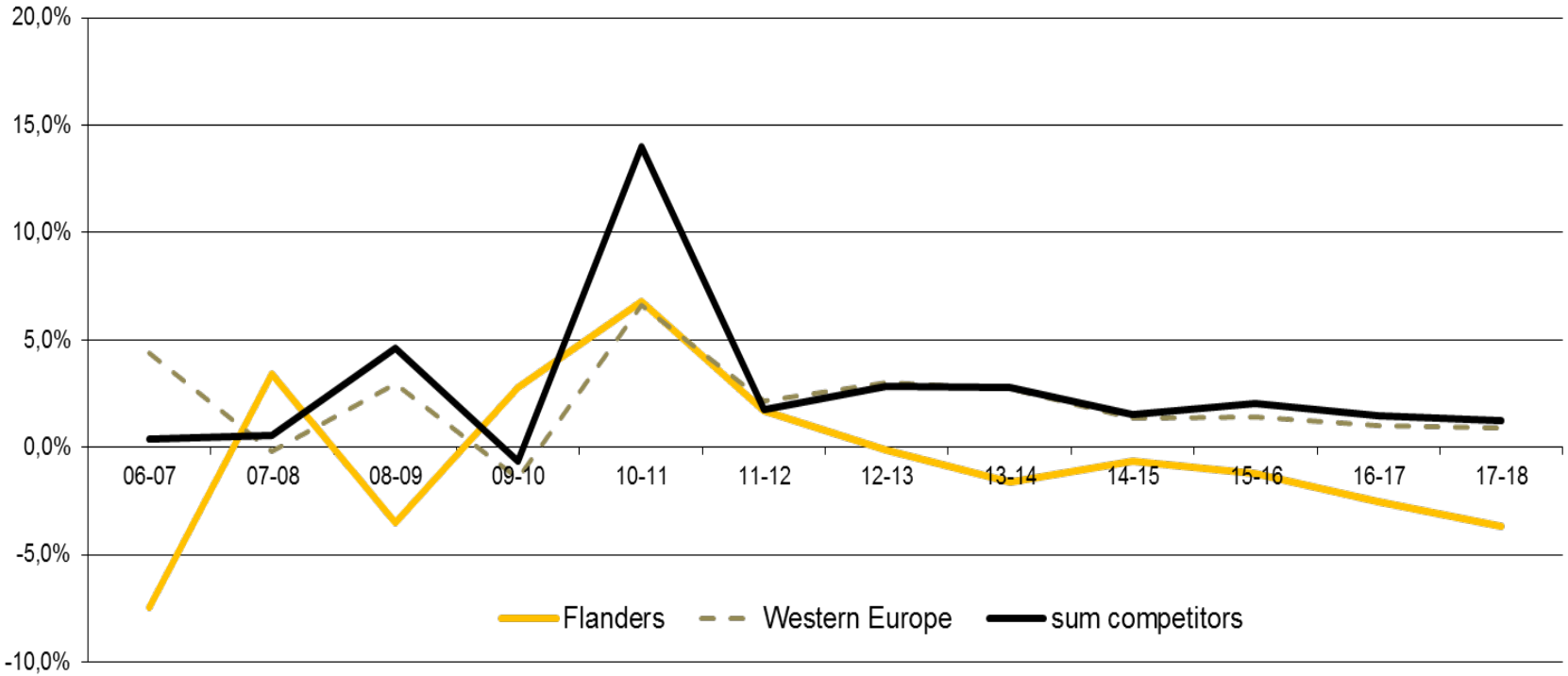
7. Country benchmark

Table 11: Trend and forecast of the Danish market in Flanders and competitive destinations (2009-2018, x1.000, in arrivals)

destination	**2009**	**2010**	**2011**	**2012**	**2013**	***2018***	***2009-2013***	***2013-2018***
Flanders	47	48	51	52	52	*51*	***+11,5%***	***-9,3%***
Western Europe	5.987	5.900	6.290	6.426	6.620	*6.803*	***+10,6%***	***+7,7%***
sum competitors	2.698	2.680	3.056	3.109	3.199	*3.288*	***+18,5%***	***+9,4%***
Sweden	520	488	820	876	882	*914*	***+69,7%***	***+18,0%***
Netherlands	135	150	137	136	137	*145*	***+1,0%***	***+22,4%***
Germany	1.139	1.214	1.243	1.357	1.395	*1.439*	***+22,5%***	***+5,3%***
France	696	614	655	536	588	*583*	***-15,6%***	***+1,5%***
Czech Republic	146	149	129	129	123	*132*	***-15,6%***	***+10,1%***
Baltic countries	62	65	72	77	74	*75*	***+18,9%***	***+22,0%***

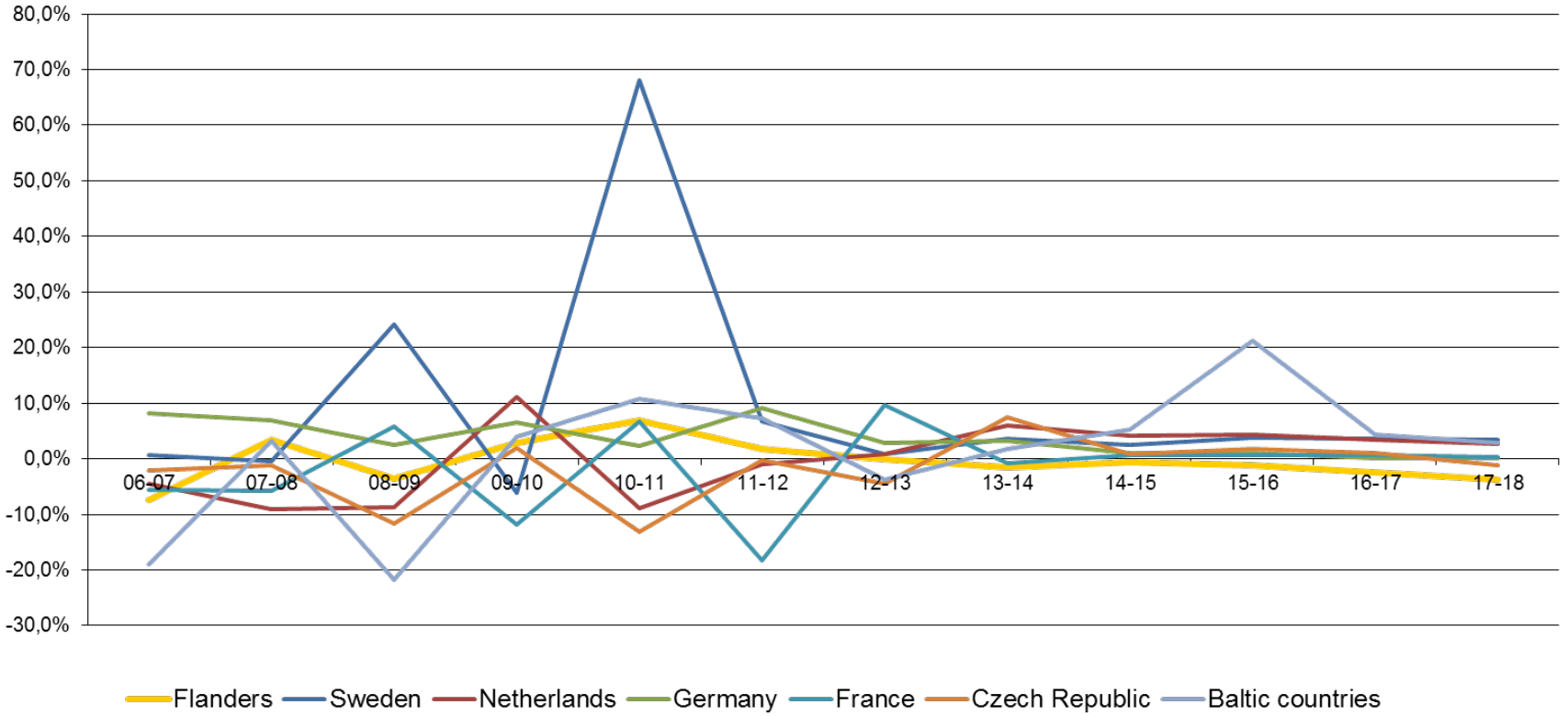
Source: VISIT**FLANDERS** *based on TDM and GDS*

Figure 16: Trend and forecast of the Danish market in Flanders, Western Europe and competitive destinations (2007-2018, in arrivals)



Source: VISIT**FLANDERS** *based on TDM and GDS*

Figure 17: Trend and forecast of the Danish market in Flanders and competitive destinations (2007-2018, in arrivals)



Source: VISIT**FLANDERS** *based on TDM and GDS*

C. PROFILE OF THE SCANDINAVIAN 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 Scandinavian 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.

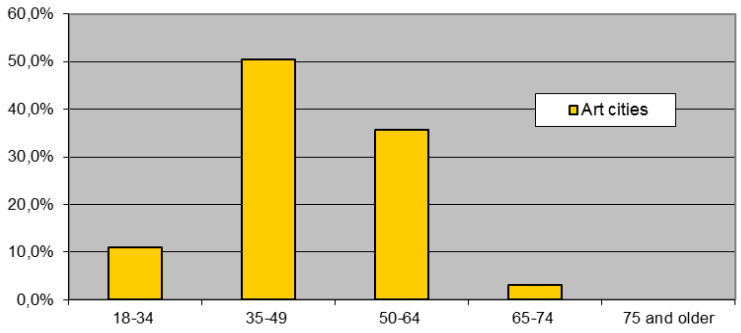
The Scandinavian market in this survey covers Sweden and Denmark. In 2011, the Swedish and Danish markets together accounted for 226,000 overnight stays in Flanders. Of these, Sweden accounted for 54%. Of the 226,000 overnight stays, 101,000 were listed as leisure. In recent years the Swedish market has followed a slightly downward trend, whereas the Danish market has improved. More than four fifths of the Scandinavian overnight stays were in the art cities.

33% of the Scandinavian tourists are from the Copenhagen region. The Stockholm region accounts for 23% and Gothenburg for 22%.

1. Profile

The average age of the Scandinavians surveyed in our art cities is 45. Half of the Scandinavian respondents are between 35 and 50 years of age. The 50-64 group is also strongly represented, with 35%. Young people and old people are much less prevalent in our art cities.

Figure 18: Age of the surveyed Scandinavian overnight leisure tourist in the art cities



More than half of the Scandinavians in our art cities live in a family in which the head of the family is a white collar employee. Only among the Italian tourists are white collar employees more strongly represented. One quarter of the heads of the family are executives, entrepreneurs or practise a liberal profession. Striking is the low score for retirees. No other nationality has fewer retirees as the head of the family.

Nine in ten heads of the family have been in higher education. University and college carry roughly equal weight.

Table 12: Profession and educational level of the family head of the Scandinavian overnight leisure tourist in the art cities

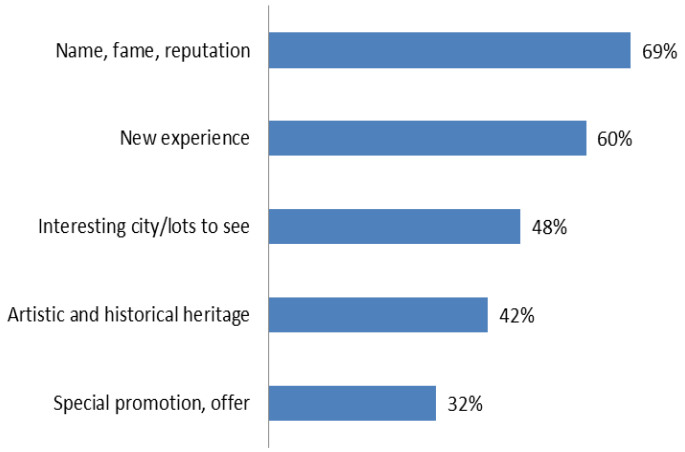
Profession of head of family	Art cities
Blue collar worker	1%
White collar employee	54%
Executive, entrepreneur, liberal profession	26%
Self-employed	9%
Retired early	7%
Other	3%
Total	**100%**
Educational level of head of family	
Primary or lower secondary education	3%
Higher secondary education	7%
Higher non-university education	46%
University education	44%
Total	**100%**

2. Competitive position and motivation

The Swedish and Danish tourist are sure of their choice of destination. Only 2% considered an alternative.

On average, Scandinavian tourists give 3 reasons for coming to the art cities. The name and fame of the cities and enjoying a new experience are the most frequently cited reasons for coming. Both are cited by more than 60% of Scandinavian tourists, which is high compared with most other markets. The many places of interest and the artistic and historical heritage both exert a strong pull. Compared with most other markets, the effect of special promotions is also noticeable. Only the Italian tourists are a little more influenced by these.

Figure 19: Top 5 reasons for Scandinavian tourists visiting the art cities



3. Characteristics of the trip

The great majority of Scandinavian tourists in our art cities travel without children. The average group size is 2.2 people, of which 1.7 belong to the same family. These are groups of average size.

Table 13: Travel group of the Scandinavian overnight leisure tourist in the art cities

	Art cities
Family/group with children	7%
Family/group without children	93%
Total	**100%**
Average family size	1.7
Average group size	2.2

Four fifths of the Scandinavian overnight leisure tourists came to Flanders by aircraft. More than nine in ten flew in to Zaventem. Charleroi received just 6%. 15% came by car.

Table 14: Transport taken by the Scandinavian overnight leisure tourist to the art cities

	Art cities
Car	15%
Ordinary train	0%
HST, Thalys or Eurostar	0%
Coach	4%
Aircraft	80%
Total	**100%**

All the Scandinavian tourists booked their accommodation in the art cities in advance. 19% of the Swedish and Danish tourists did this directly through the operator, 81% via an agent of one kind or another. More than half booked via an online travel agency. The travel agency is also important, with a share of 22%.
70% used the Internet to book.

Table 15: Booking of accommodation by the Scandinavian overnight leisure tourist in the art cities

	Art cities
Not booked in advance	0%
Directly through the operator	19%
Through an agent:	81%
Booking site, online travel agent	54%
Travel agency, tour operator	22%
Other	4%
Total	**100%**

4. Information sources

96% of the Scandinavian tourists made preparations before coming to our art cities.

More than four fifths used the Internet to do this. Strikingly, 63% made use of a VISITFLANDERS website. No other nationality makes as much use of this website. This might be linked to the fact that a quarter also remember an article they read in a magazine or periodical. In total, 29% cite the press as a source of information. Compared to the other nationalities, this is high. Family, friends and acquaintances were a source of information for 59% of Scandinavian tourists. Nowhere does this source play a greater role.

42% of the Scandinavians holidaying in Flanders make use of brochures and folders.

Table 16: Information sources used by the Scandinavian overnight leisure tourist in the art cities

	Art cities
No research/Past experience	4%
Research in advance	96%
Total	**100%**
Details checked in advance (overall basis):	
Online information and websites	83%
TV, radio or press	29%
Informal channels (family, friends and acquaintances)	59%
Brochures, folders, printed matter	42%
Travel guide, tourist guide	1%
Other information	3%

5. Activities

On average, Scandinavians do 6.8 activities. Only the Spanish tourists equal this high number. Just about all Scandinavian tourists go for a walk around the city centre. Visits to monuments (91%), churches and cathedrals (69%) and museums (69%) score high. Guided city walks (35%) and city tours by carriage or bus (24%) also do very well compared to the other markets. Striking is the very high score for gastronomy, 87%. No other market cites this activity as much.

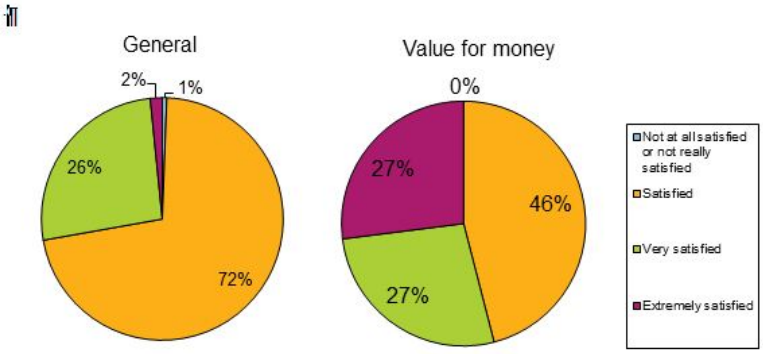
In relation to this, Scandinavian tourists clearly also enjoy a beverage on a café terrace (67%). Only among British tourists is this percentage higher. Also popular among the Scandinavians, compared with other tourists, is tasting the local cuisine (32%). Besides the activities in the art city at which they are staying, one third go on an excursion to another place in Flanders. This is almost always another art city.

6. Satisfaction and return visit

72% of Scandinavian tourists are satisfied with their stay in the art cities, 26% are very satisfied and 2% are extremely satisfied. Hardly anyone is not satisfied. This gives a score of 3.3 out of 5.

All Scandinavian overnight leisure tourists are satisfied with the value for money offered in the art cities. 63% are just satisfied and 37% are very satisfied. No one is extremely satisfied. This is in keeping with the average tourist. The art cities therefore receive an average score of 3.4 out of 5.

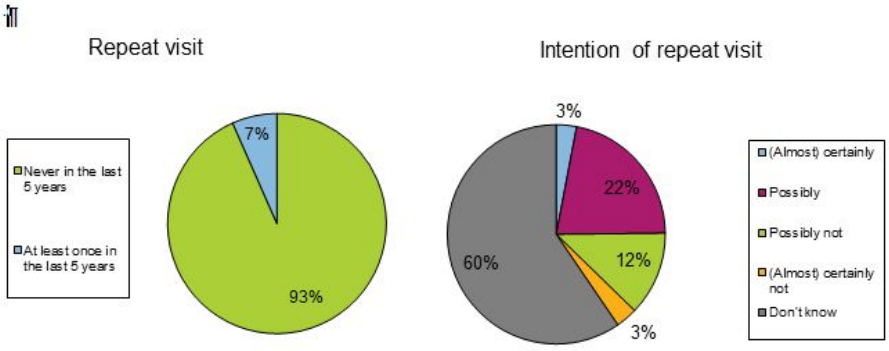
Figure 20: Satisfaction, general and with value for money, of the Scandinavian overnight leisure tourist in the art cities



93% of the Scandinavian tourists in our art cities are here for the first time. This is high compared with the other markets.

60% do not yet know whether they will return. This is also a high percentage. Only the Spanish tourists are less certain on this point.

Figure 21: Actual* and intentional return visit by the Scandinavian overnight leisure tourist in the art cities**



*In the last 5 years

** Within this and 3 years

7. Spending

Scandinavian tourists spend on average 92 euros per person per night. The largest share, 30 euros, goes on food and drinks. They spend almost 2 euros less on their accommodation. A large share also goes on shopping.

Scandinavian tourists spend the least of all the nationalities, a good 25 euros less than the next lowest spenders, the Spanish. The low spending applies across all categories. From the reasons they give for coming, we see that the Scandinavians like to take advantage of special promotions.

Table 17: Average spend of the Scandinavian overnight leisure tourist in Flanders

Spend, per person per night (euros)	art cities
Accommodation	28
Food/drinks	30
Attractions	8
Travel	4
Shopping	23
Other	0
Total	**92**

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).

In 2010, a new decree concerning the accommodation sector reorganized the different types of accommodations. B&B's could register their figures starting 2012 in the new category 'B&B'. Before 2012, only B&Bs with a hotel licence were represented in the statistics, in the category 'hotel'. Because of this change, there is a deviation in the trend between 2011 and 2012. Please use the five-year trend with caution.

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 (in Dutch) or contact kennisbeheer@toerismevlaanderen.be.

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