Flanders
State of
the Art

Tourism in Figures

2013

the Dutch market in Flanders

VISITFLANDERS

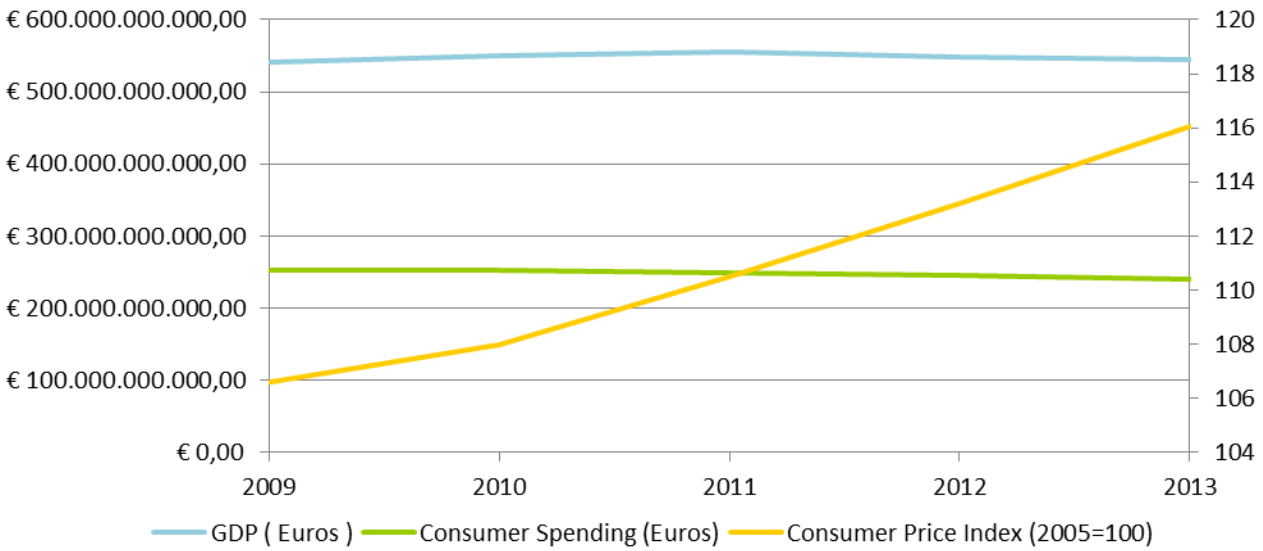
TABLE OF CONTENT

A. ECONOMIC INDICATORS

Table 1: Trend of the Dutch economy 2009-2013

	2009	2010	2011	2012	2013	09-13
GDP, real (x1000 000€)	541.376	549.334	554.918	547.906	543.749	0,4%
Consumer spending (x1000 000 €)	251.868	252.613	249.908	245.803	240.694	-4,4%
Consumer Price Index	106,6	108,0	110,5	113,2	116,1	9,4%

Figure 1: Trend of the Dutch economy 2009-2013



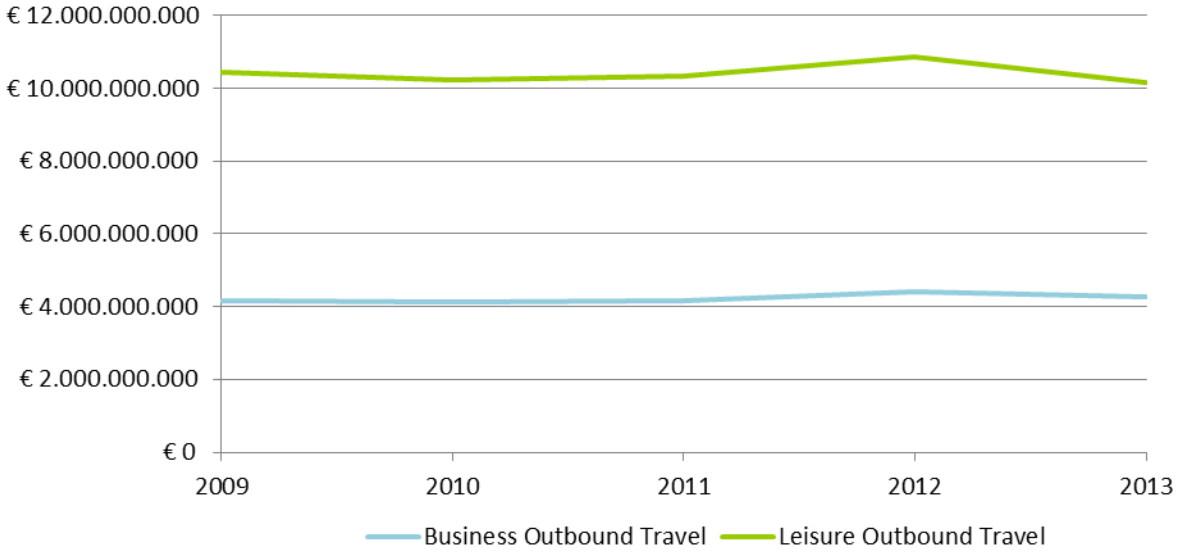
Source: VISIT FLANDERS based on

Table 2: Trend of the Dutch population 2009-2013

	2009	2010	2011	2012	2013	09-13
Population	16.541.500	16.625.500	16.702.400	16.761.100	16.822.300	1,7%
Population, 65+	15,2%	15,5%	16,0%	16,6%	17,1%	1,9*
Unemployement rate	4,8%	5,5%	5,4%	6,4%	8,2%	3,4*

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

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



Source: VISIT FLANDERS based on

B. THE DUTCH MARKET IN FLANDERS

1. Key figures

Table 3: Total foreign and Dutch market in Flanders 2013

	Overall total foreign travellers	Dutch travellers	% Netherlands	Ranking Dutch market
arrivals	6.488.545	1.358.757	20,9%	1st
overnight stays	13.742.727	2.991.398	21,8%	1st
length of stay (nights)	2,1	2,2		

Source: VISIT FLANDERS based on GDS

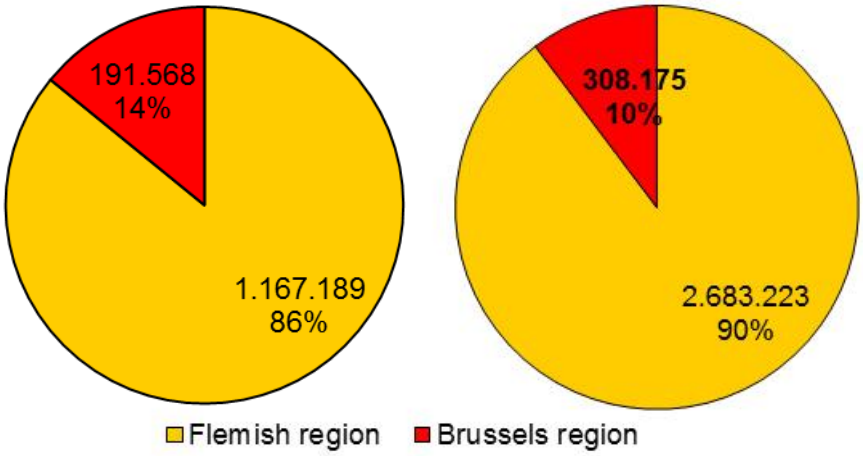
2. Distribution within Flanders

Table 4: The Dutch market in Flanders by region 2013

	arrivals	%	overnights	%
Flemish region	1.167.189	86%	2.683.223	90%
Brussels region	191.568	14%	308.175	10%
Flanders	**1.358.757**	**100%**	**2.991.398**	**100%**

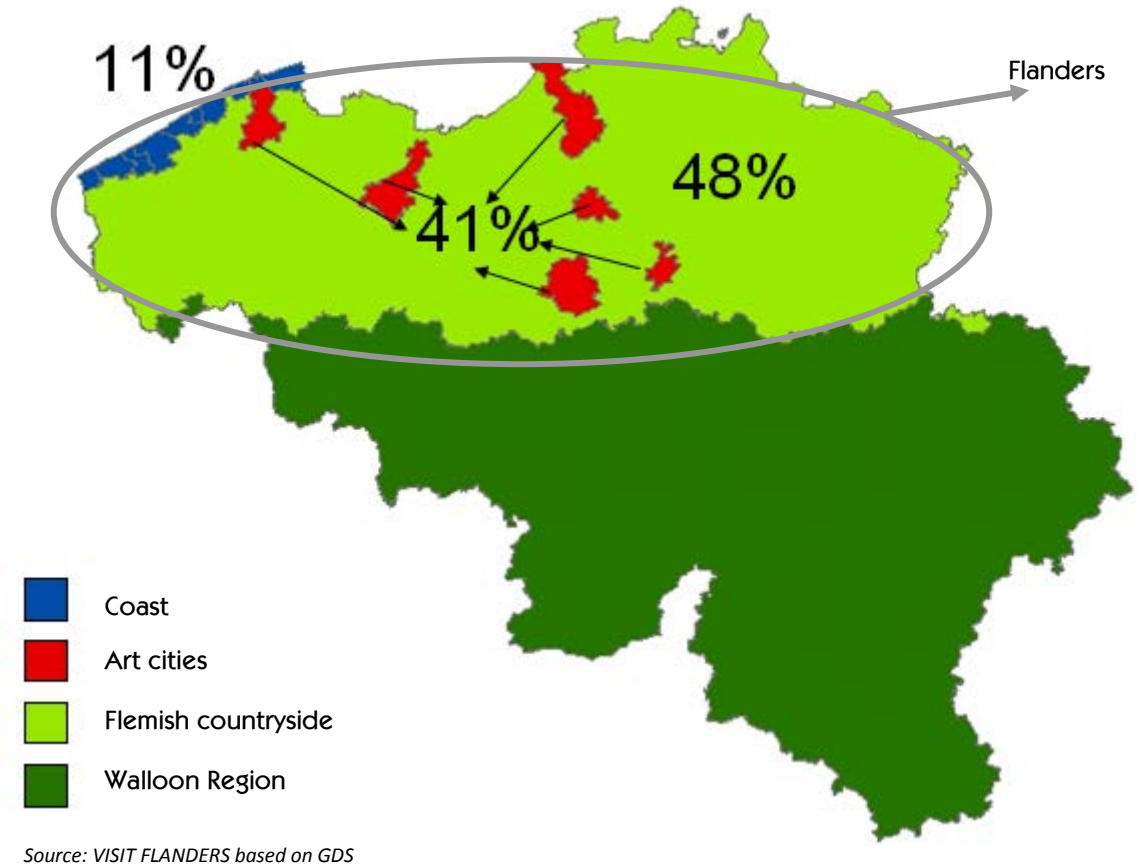
Source: VISIT FLANDERS based on GDS

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



Source: VISIT FLANDERS based on GDS

Figure 4: Dutch overnights in Flanders 2013



Source: VISIT FLANDERS based on GDS

Table 5: The Dutch market in Flanders by destination 2013

	overnights	%
Coast	338.590	11%
Art cities	1.225.828	41%
Flemish countryside	1.426.980	48%
Flanders	**2.991.398**	**100%**

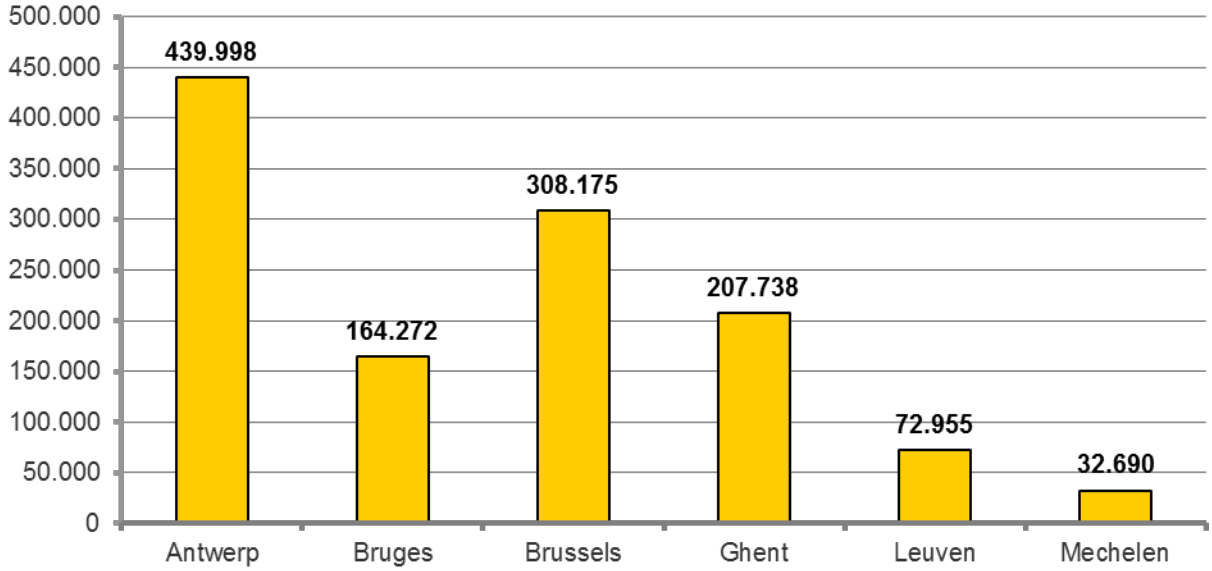
Source: VISIT FLANDERS based on GDS

Table 6: The Dutch market in the Art cities 2013

	overnights	%
Antwerp	439.998	36%
Bruges	164.272	13%
Brussels	308.175	25%
Ghent	207.738	17%
Leuven	72.955	6%
Mechelen	32.690	3%

Source: VISIT FLANDERS based on GDS

Figure 5: Dutch overnights in the Art cities 2013



Source: VISIT FLANDERS based on GDS

3. Trends

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

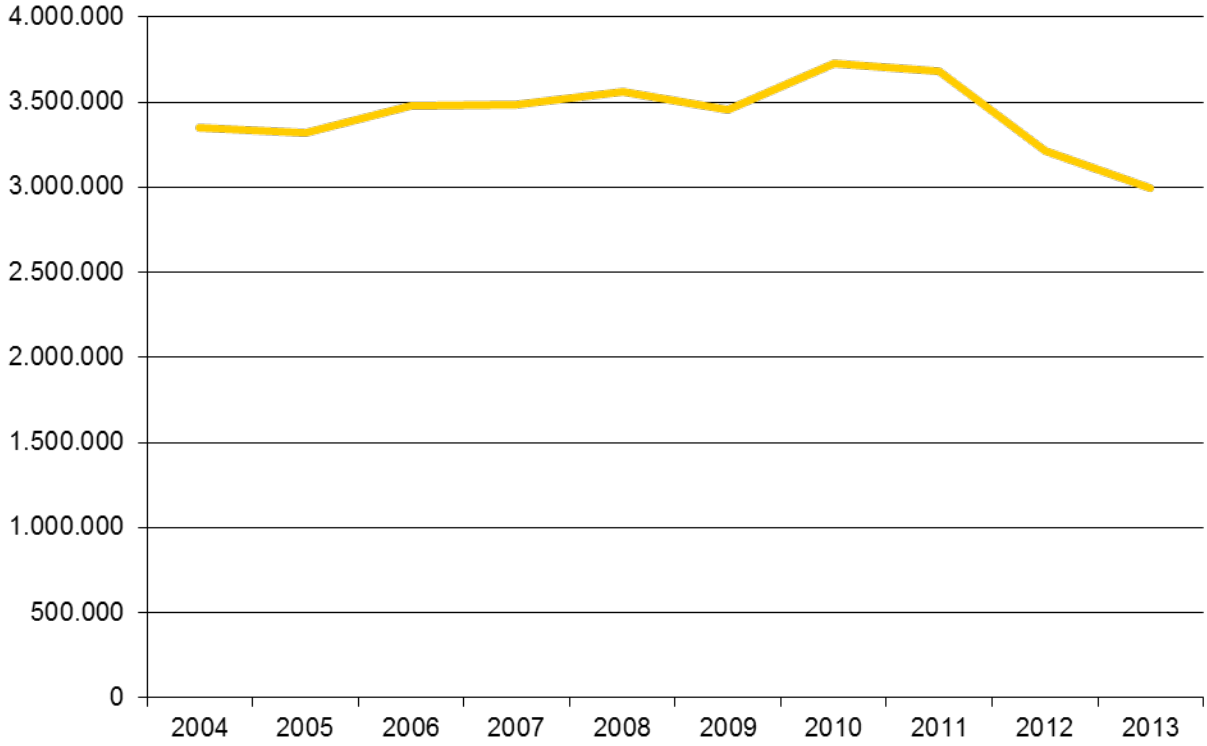
	2004	2005	2006	2007	2008	2009	2010	2011	2012*	2013	04-13
Overnights (x1.000)	3.349	3.321	3.475	3.485	3.559	3.457	3.729	3.681	3.218	2.991	-10,7%
Arrivals (x1.000)	1.259	1.264	1.335	1.356	1.390	1.393	1.504	1.504	1.457	1.359	+7,9%
Aver. length of stay**	2,66	2,63	2,60	2,57	2,56	2,48	2,48	2,45	2,21	2,20	-17,2%

Source: VISIT FLANDERS based on GDS

**B&Bs included*

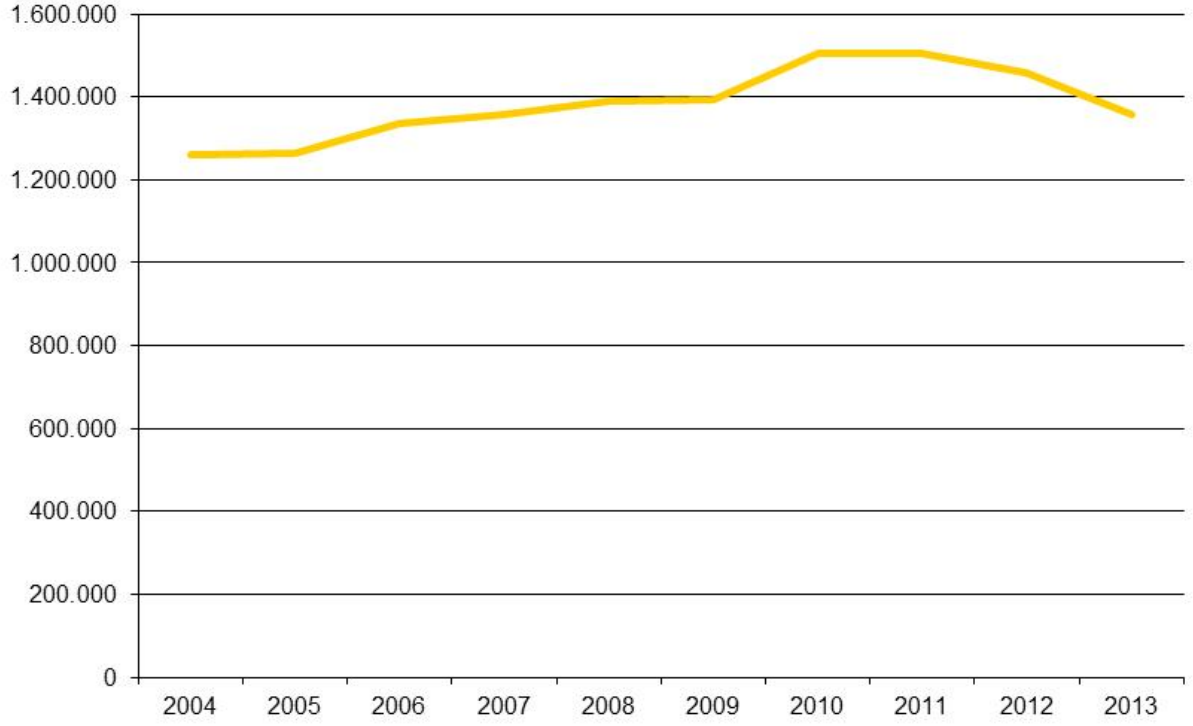
***nights*

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



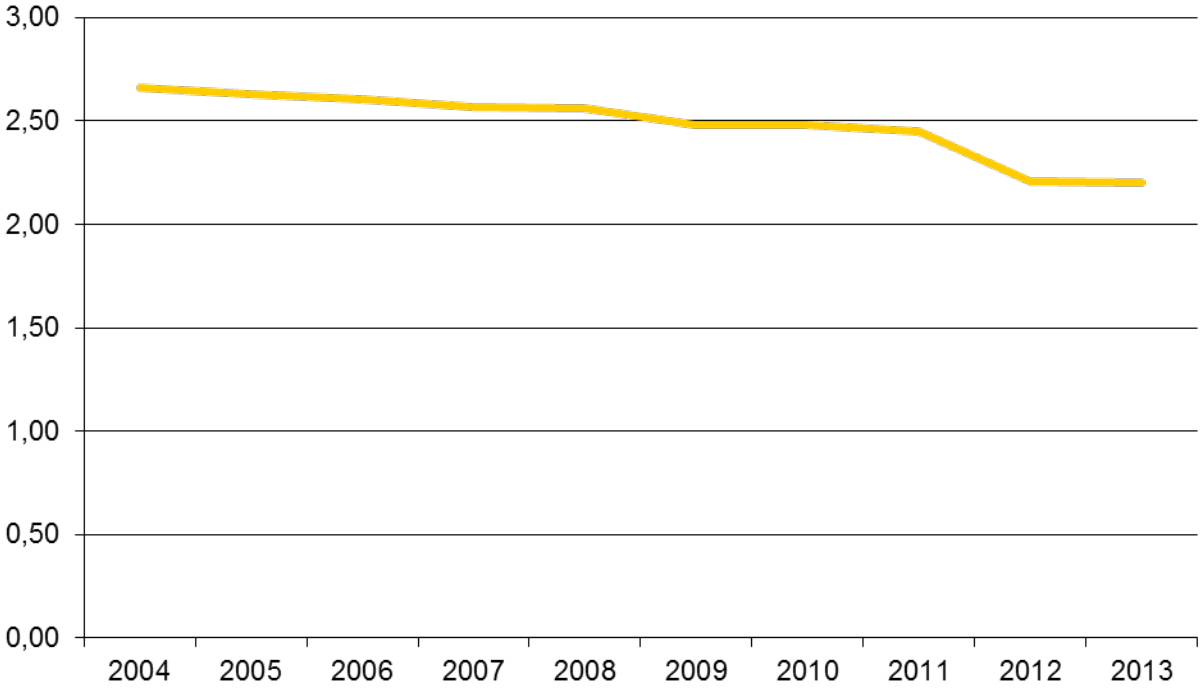
Source: VISIT FLANDERS based on GDS

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



Source: VISIT FLANDERS based on GDS

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



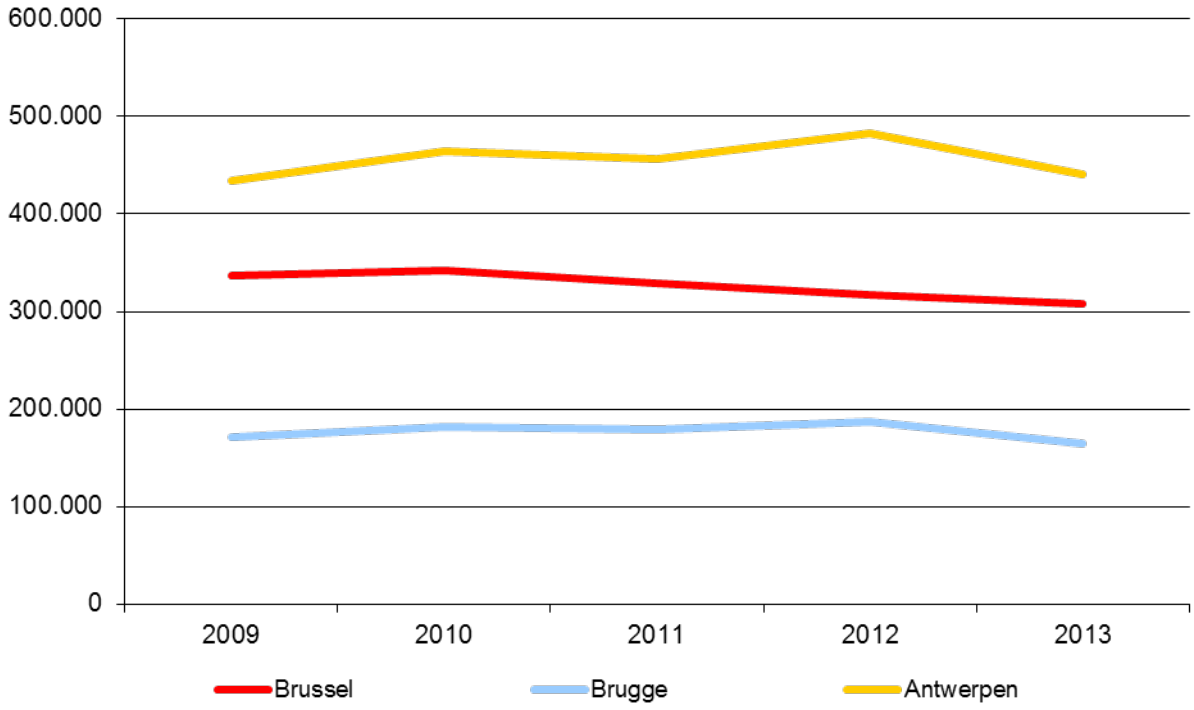
Source: VISIT FLANDERS based on GDS

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

	2009	2010	2011	2012*	2013	09-13
Coast	436.142	487.583	502.270	402.758	338.590	-22,4%
Art cities	1.211.611	1.263.105	1.239.364	1.295.936	1.225.828	+1,2%
Antwerp	433.991	464.750	456.229	483.182	439.998	+1,4%
Bruges	170.804	181.403	178.883	186.573	164.272	-3,8%
Brussels	337.058	341.511	328.642	317.349	308.175	-8,6%
Ghent	184.835	191.284	191.204	207.027	207.738	+12,4%
Leuven	46.045	44.509	44.495	64.858	72.955	+58,4%
Mechelen	38.878	39.648	39.911	36.947	32.690	-15,9%
Flemish countryside	1.809.094	1.978.519	1.939.757	1.518.966	1.426.980	-21,1%
Flanders	**3.456.847**	**3.729.207**	**3.681.391**	**3.217.660**	**2.991.398**	**-13,5%**

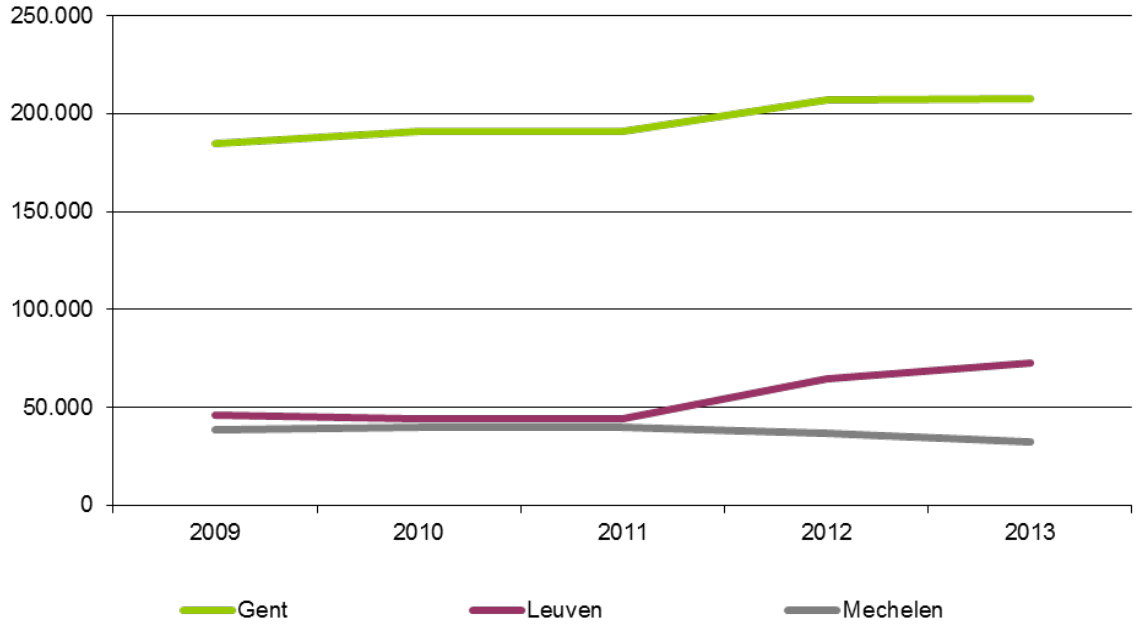
Source: VISIT FLANDERS based on GDS **B&Bs included*

Figure 9: Trend of Dutch overnights in Antwerp, Brussels and Bruges 2009-2013



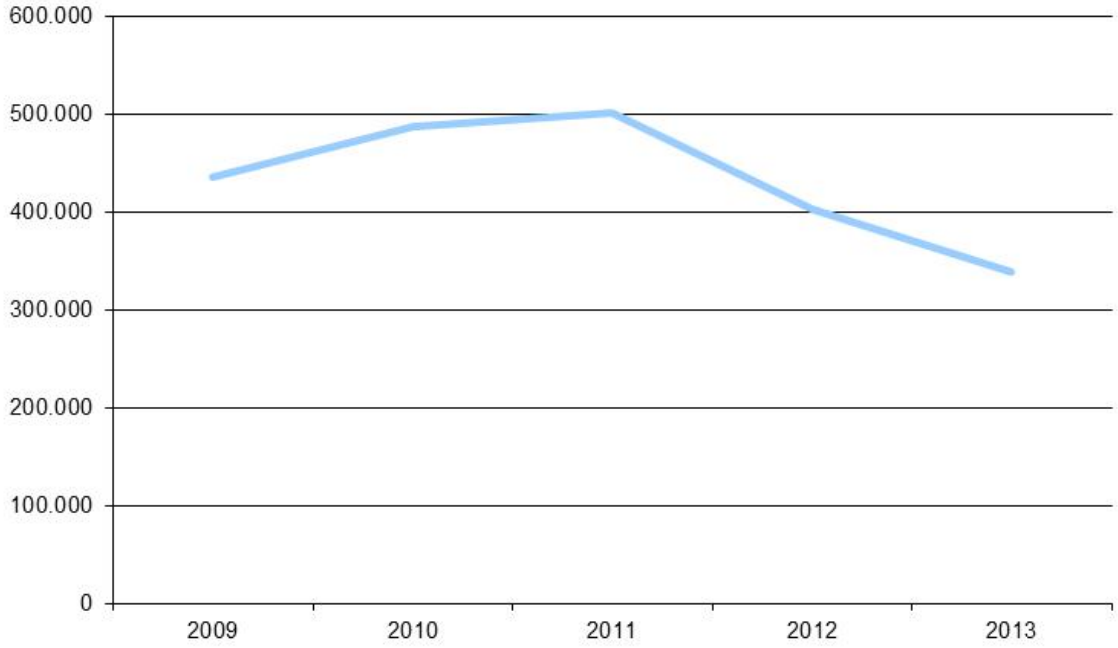
Source: VISIT FLANDERS based on GDS

Figure 10: Trend of Dutch overnights in Ghent, Leuven, Mechelen 2009-2013



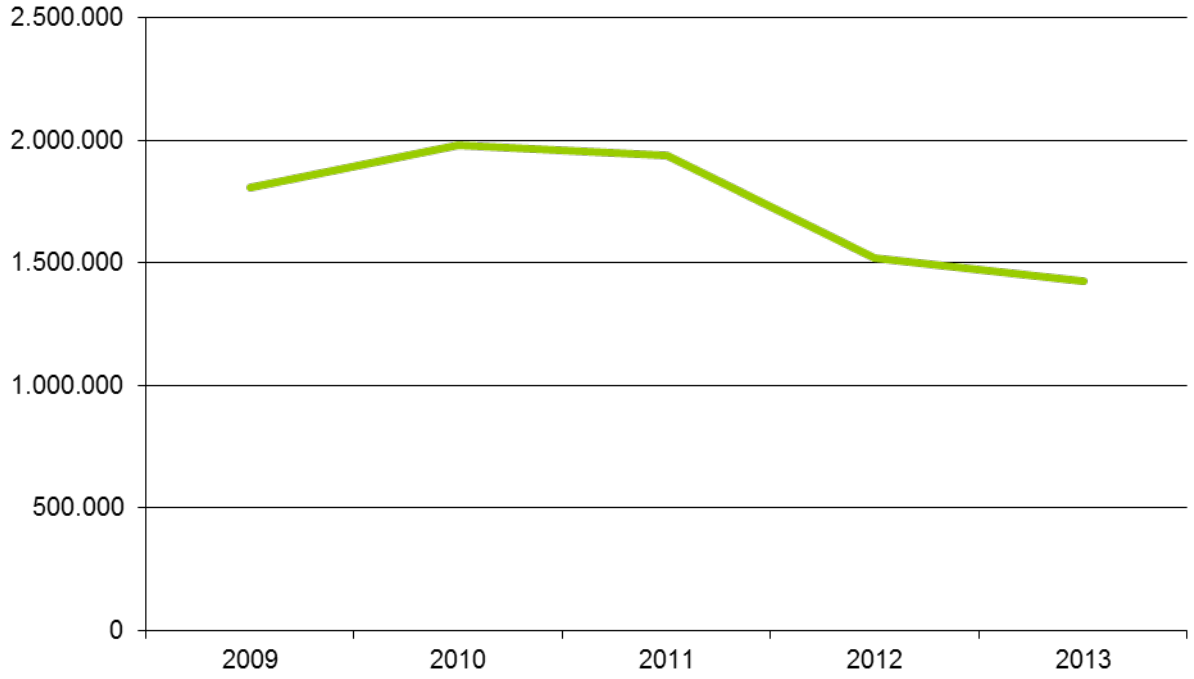
Source: VISIT FLANDERS based on GDS

Figure 11: Trend of Dutch overnights at the coast 2009-2013



Soure: VISIT FLANDERS based on GDS

Figure 12: Trend of Dutch overnights in the Flemish countryside 2009-2013



Source: VISIT FLANDERS based on GDS

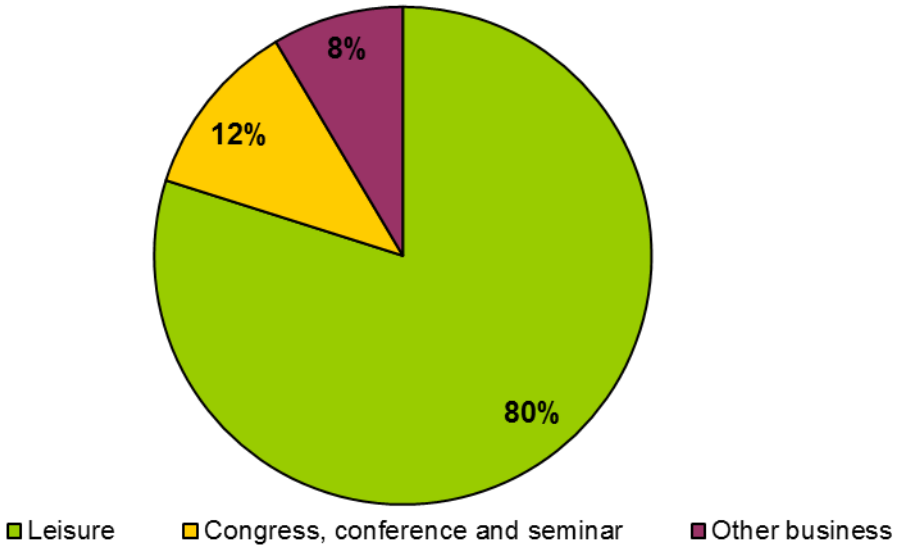
4. Motive of stay

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

	Leisure		Congress, conference and seminar		Other business		Total	
Coast	328.433	97%	2.802	1%	7.355	2%	338.590	100%
Art cities	835.322	68%	261.886	21%	128.620	10%	1.225.828	100%
Antwerp	300.399	68%	92.465	21%	47.134	11%	439.998	100%
Bruges	149.471	91%	9.430	6%	5.371	3%	164.272	100%
Brussels	155.721	51%	116.495	38%	35.959	12%	308.175	100%
Ghent	160.234	77%	30.418	15%	17.086	8%	207.738	100%
Leuven	46.654	64%	9.013	12%	17.288	24%	72.955	100%
Mechelen	22.843	70%	4.065	12%	5.782	18%	32.690	100%
Flemish countryside	1.226.194	86%	81.290	6%	119.496	8%	1.426.980	100%
Flanders	**2.389.949**	**80%**	**345.978**	**12%**	**255.471**	**9%**	**2.991.398**	**100%**

Source: VISIT FLANDERS based on GDS

Figure 13: The Dutch market in Flanders by motive of stay 2013 (overnights)



Source: VISIT FLANDERS based on GDS

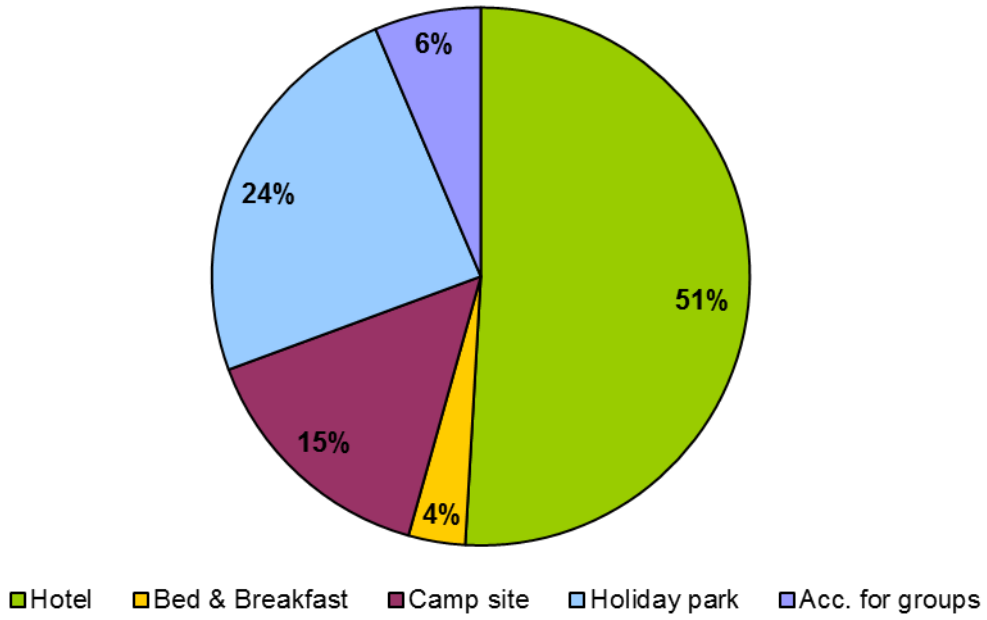
5. Type of accommodation

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

	Coast	%	Art cities	%	Flemish countryside	%	Flanders	%
Hotel	97.349	29%	1.086.899	89%	339.195	24%	1.523.443	51%
Bed & Breakfast	5.489	2%	37.377	3%	59.280	4%	102.146	3%
Camp site	70.817	21%	46.396	4%	332.343	23%	449.556	15%
Holiday park	154.872	46%	0	0%	569.583	40%	724.455	24%
Acc. for groups	10.063	3%	55.156	4%	126.579	9%	191.798	6%
Total	**338.590**	**100%**	**1.225.828**	**100%**	**1.426.980**	**100%**	**2.991.398**	**100%**

Source: VISIT FLANDERS based on GDS

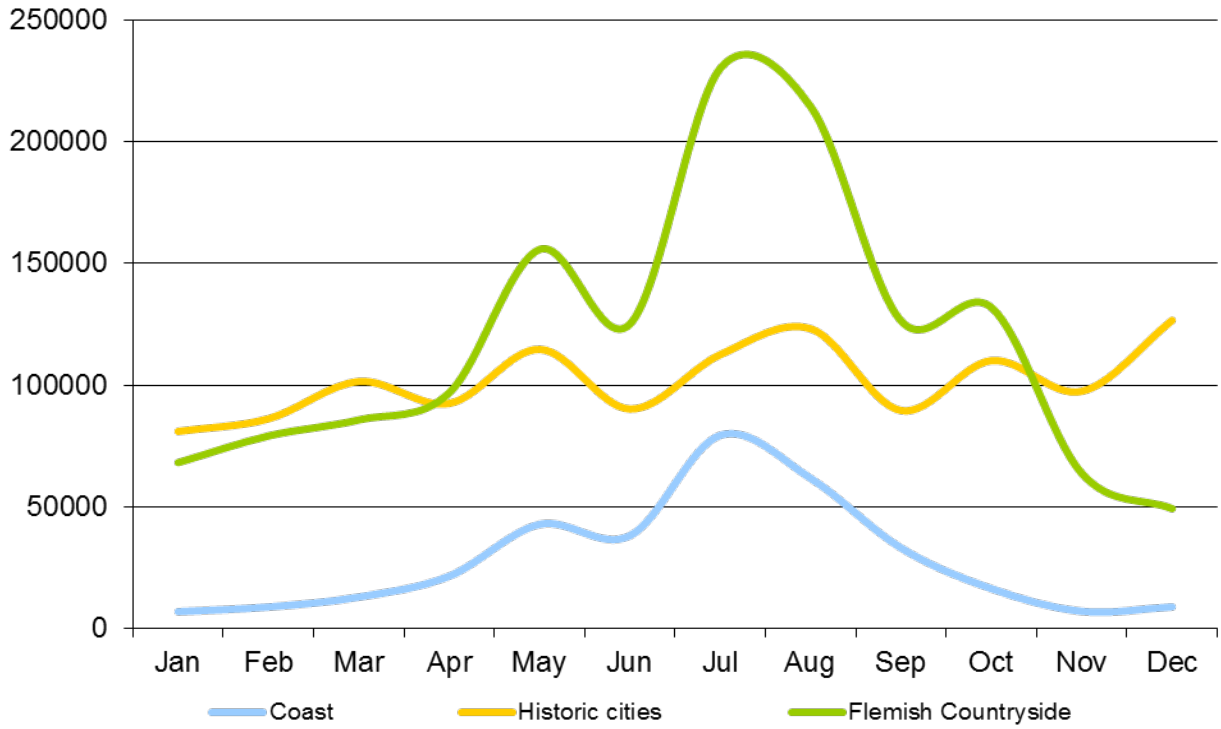
Figure 14: The Dutch market in Flanders by type of accommodation 2013 (overnights)



Source: VISIT FLANDERS based on GDS

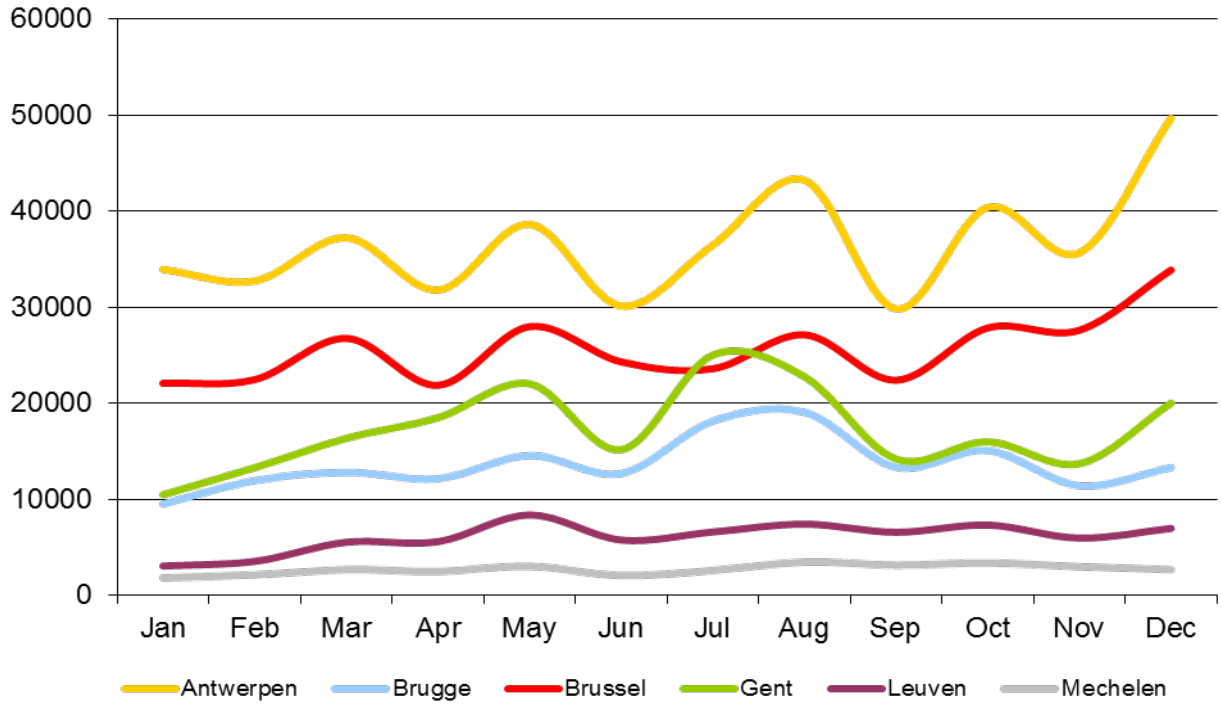
6. Seasonality

Figure 15: Dutch overnights in Flanders – seasonality 2013



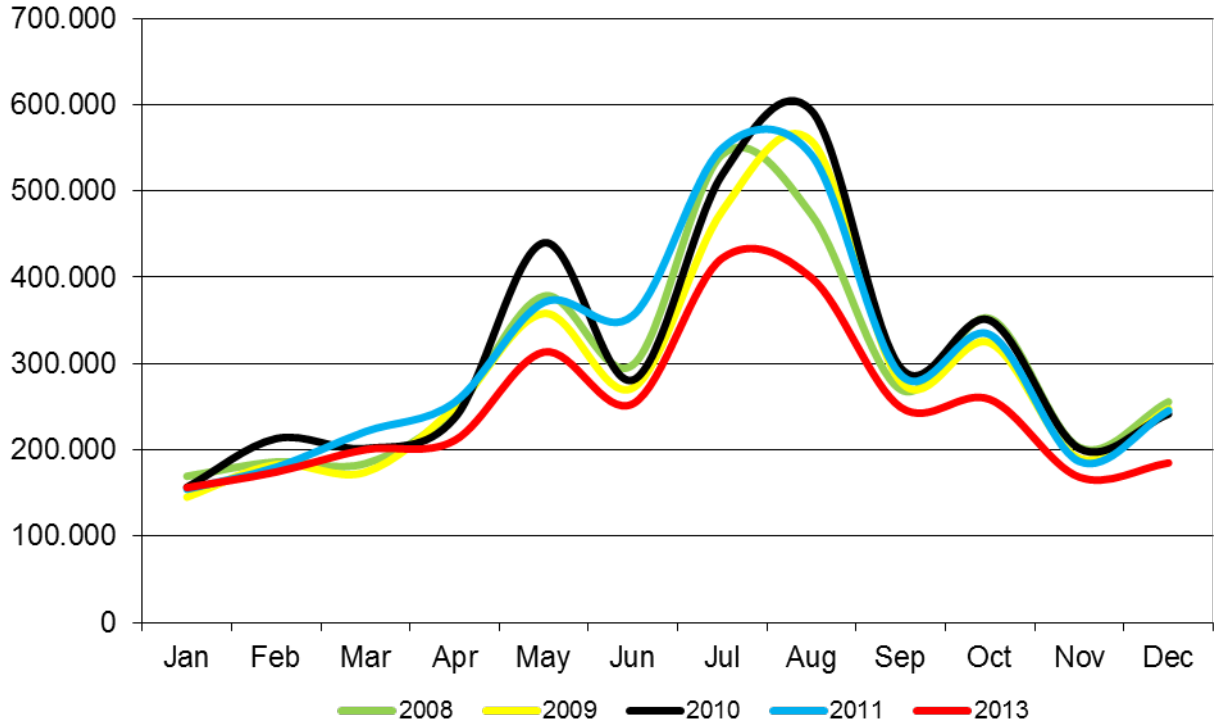
Source: VISIT FLANDERS based on GDS

Figure 16: Dutch overnights in the Art cities – seasonality 2013



Source: VISIT FLANDERS based on GDS

Figure 17: Trend Dutch overnights in Flanders – seasonality 2009-2013



Source: VISIT FLANDERS based on GDS

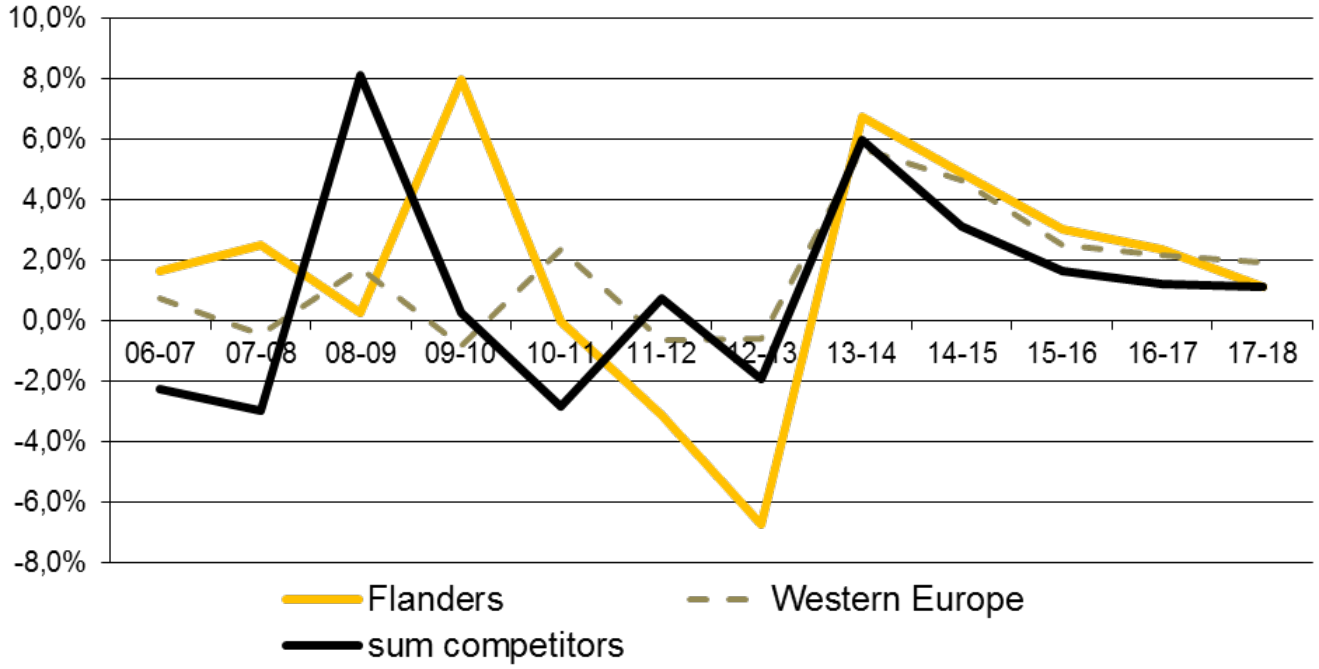
7. Country benchmark

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

destination	*2009*	*2010*	*2011*	*2012*	*2013*	*2018*	*2009-2013*	*2013-2018*
Flanders	1.393	1.504	1.504	1.457	1.359	*1.621*	***-2,1%***	***+19,3%***
Western Europe	22.735	22.540	23.063	22.911	22.774	*26.874*	***+0,2%***	***+18,0%***
sum competitors	13.078	13.107	12.733	12.829	12.578	*14.294*	***-3,8%***	***+13,6%***
France	7.224	7.002	6.493	6.355	5.974	*6.363*	***-17,3%***	***+6,5%***
Germany	3.692	3.918	4.036	4.170	4.128	*4.910*	***+11,8%***	***+18,9%***
Spain	2.089	2.276	2.772	2.549	2.606	*3.494*	***+24,8%***	***+34,1%***
United Kingdom	1.715	1.758	1.788	1.916	2.123	*2.599*	***+23,7%***	***+22,4%***
Wallonia	446	430	416	387	353	*422*	***-20,8%***	***+19,3%***

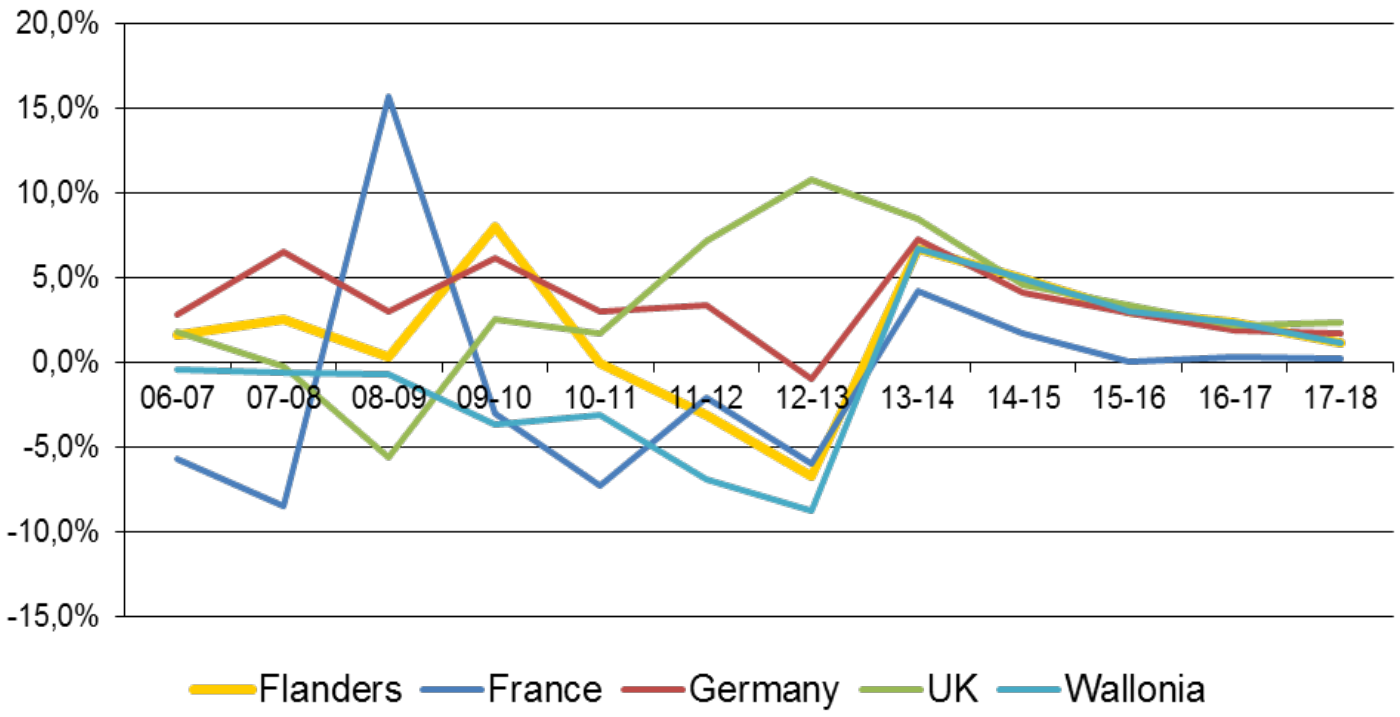
Source: VISIT FLANDERS based on TDM and GDS

Figure 18: Trend and forecast of the Dutch market in Flanders, Western Europe and competitive destinations (2007-2018, in arrivals)



Source: VISIT FLANDERS based on TDM and GDS

Figure 19: Trend and forecast of the Dutch market in Flanders and competitive destinations (2007-2018, in arrivals)



Source: VISIT FLANDERS based on TDM and GDS

C. PROFILE OF THE DUTCH 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 Dutch 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 Netherlands is Flanders' biggest foreign market. It generates 3.8 million overnight stays in Flanders (including the rental of holiday homes on the coast through rental agencies), of which 3.2 million are overnight leisure stays. Data from Westtoer also tell us that there are, via direct rental on the coast, another 100,000 or so Dutch overnight stays. About half of the Dutch overnight stays are in the Flemish countryside, a third in the art cities and the remainder on the coast.

The Dutch visitors to the coast come mostly from the south of the Netherlands. North Brabant and Limburg together account for half. An exception is Zeeland, with 4%. South Holland accounts for another 12%. Other provinces are less significant.

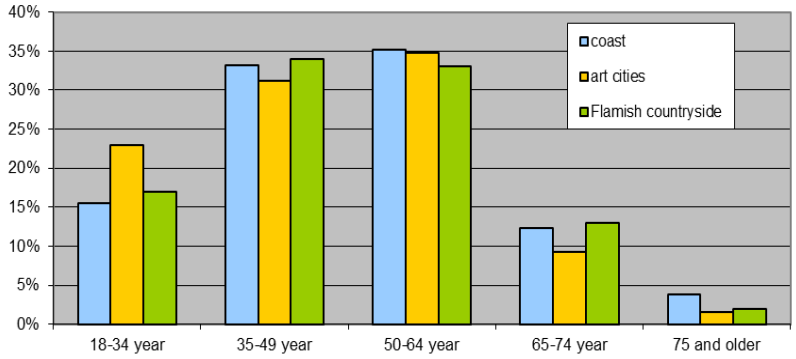
Dutch visitors in the art cities are also mostly from the southern half of the Netherlands. No one province stands out against the rest. The provinces of South Holland, North Brabant and Utrecht each account for around 16%. North Holland and Limburg each account for around 12%.

Dutch visitors in the Flemish countryside are mostly from the provinces of North Brabant and South Holland, each accounting for 22% of the Dutch visitors.

1. Profile

The first element we discuss in the profile is the age of the respondent. On the coast this is 50, on average, and it means that the Dutch market is the youngest on the coast. The art cities have younger visitors. Here, the Dutch tourist is 46 on average. The Dutch visitors surveyed in the Flemish countryside are on average one year or so younger than the visitors to the coast. If we look at the age distribution we see that they are in the middle age categories, the 35-49 and 50-64 groups, who are by far the mostly strongly represented at each of the destinations, each having a share of between 30% and 35%. Young people are more likely to visit the art cities, where they account for more than 20% of the Dutch visitors. The over-65 Dutch visitor prefers the coast and a greener environment.

Figure 20: Age of the surveyed Dutch overnight leisure tourist in Flanders



The profession of the head of the family of the Dutch tourist in Flanders differs according to destination, but is not as pronounced as it is with the Belgian tourist. On the coast, executives, entrepreneurs and practitioners of a liberal profession form the largest group (27%). White collar employees account for one quarter and retirees another percentage point less. Compared with the other markets on the coast, Dutch executives, entrepreneurs and practitioners of a liberal profession have a strong presence, whereas the opposite can be said of Dutch retirees. In the art cities 40% of the heads of families are white collar employees. A little over one fifth are executives, entrepreneurs or practitioners of a liberal profession. Another fifth are retired. This brings the Dutch in line with the average in the art cities. The distribution in the Flemish countryside is comparable with the coast. Executive, entrepreneur or member of the liberal professions is the most frequently occurring group, with 30%. One quarter are retired and one fifth are white collar employees. Compared with the Belgians in the Flemish countryside, there are many more Dutch executives, entrepreneurs and people with a liberal profession and fewer white collar employees.

As regards educational level of the head of the family there are clear differences between destinations. On the coast almost 40% of the heads of the family have a certificate of higher secondary education, 30% have a higher non-university certificate and 20% have a certificate of primary or lower secondary education. University has the smallest share. In the Flemish countryside, Dutch tourists with university degrees are represented much less, whereas the other three levels of education vary between 26% and 32%. In the art cities the situation is different. Half of the family heads completed higher non-university education and one in five studied at university. In other words, 70% followed higher studies, compared to 43% at the seaside and 41% in the countryside. And yet the share with a university degree is the lowest of all the markets.

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

Profession of head of family	Coast	Art cities	Flemish countryside
Blue collar worker	11%	6%	14%
White collar employee	25%	40%	20%
Executive, entrepreneur, liberal profession	27%	22%	30%
Self-employed	12%	9%	9%
Retired early	24%	20%	25%
Other non-working	2%	3%	2%
Total	**100%**	**100%**	**100%**
Educational level of head of family			
Primary or lower secondary education	20%	3%	27%
Higher secondary education	38%	28%	32%
Higher non-university education	30%	49%	26%
University education	13%	20%	15%
Total	**100%**	**100%**	**100%**

2. Competitive position and motivation

The three destinations experienced little competition among the Dutch tourists that opted for them in 2011. In the case of the coast, 16% considered an alternative, and in the case of a holiday in the countryside, 35%. In the art cities 5% had considered another city outside Flanders. These percentages differ little from the average.

On average, a Dutch tourist has 1.9 reasons for a holiday on the coast. The nice holiday atmosphere is the most frequently cited, at 29%. In this the Dutch clearly differ from the other markets. In second place comes proximity along with the unique environment of sea and beach. About half of the Dutch tourists were on a city trip to an art city because they found it an interesting city with plenty to see. Almost four in ten were there because of the city's fame. Proximity is also frequently cited, more even than among the Belgians. Positive past experience comes fourth, with 23%. Looking for a new experience did not fall from the top five, though it has the same score as the holder of fifth place, i.e. the pleasant atmosphere. Only the Belgians and the French consider the atmosphere (including holiday atmosphere) as important. When on holiday in the Flemish countryside, 30% of Dutch tourists are in search of rest. 28% choose a holiday in the countryside because the destination is easy to reach. The same percentage is attracted by the landscape. The top answer of the Flemings, being the cycling, comes in fourth place and is the reason for one quarter of Dutch tourists (compared to 44% of Flemings). The top five answers are completed by the desire to explore an unfamiliar area.

In each of the destinations, ease of access was among the top answers cited by the Dutch tourists.

Figure 21: Top 5 reasons for Dutch tourists visiting the coast

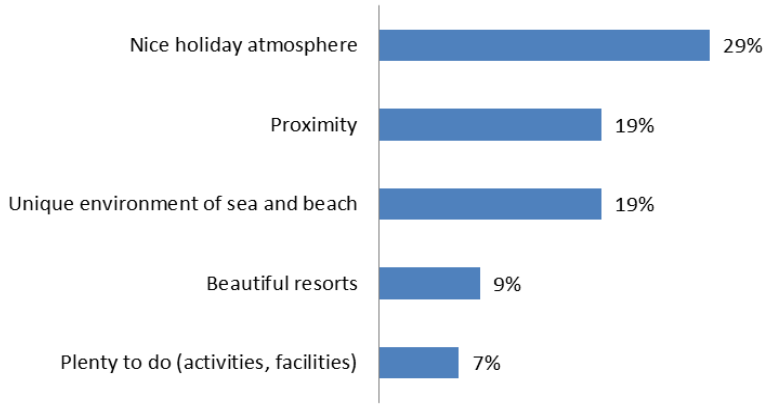


Figure 22: Top 5 reasons for Dutch tourists visiting the art cities

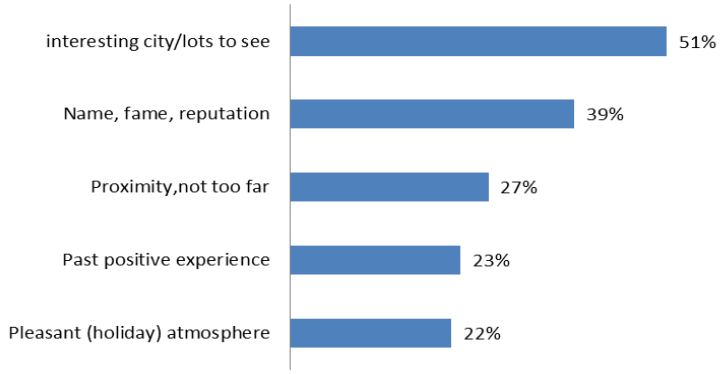
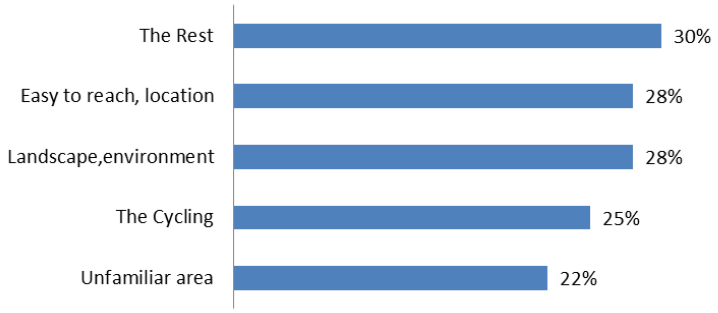


Figure 23: Top 5 reasons for Dutch tourists visiting the Flemish countryside



3. Characteristics of the trip

Dutch tourists on the coast and in the countryside are more often in the company of children than are those in the art cities. On the coast, 44% of groups stay with children, in the countryside the percentage is very similar. In the art cities, the figure is just 4% of Dutch groups.

Average family size on the coast and in the Flemish countryside is also similar, being 2.6 and 2.7 respectively. However, one remarkable difference is group size. In the Flemish countryside groups count on average 0.7 people more, which tends to suggest that the Flemish countryside is visited more with friends or family than is the coast. In the art cities, size of family and size of group are much smaller. The difference between the two is greater than in other markets. This suggests that Dutch tourists are also happy to visit the art cities in the company of non-family members.

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

	Coast	Art cities	Flemish countryside
Family/group with children	44%	4%	43%
Family/group without children	56%	96%	57%
Total	**100%**	**100%**	**100%**
Average family size	2.6	1.7	2.7
Average group size	3.4	2.3	4.1

More than nine in ten Dutch holidaymakers drive to the coast and the Flemish countryside by car. Although the percentages are small, the presence of the camper van on the coast and in the countryside is notable.
To get to the art cities, three quarters of Dutch tourists use the car, a fifth go by train. Among no other nationality is the percentage of cars in the city so high.

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

	Coast	Art cities	Flemish countryside
Car	93%	75%	92%
(Ordinary) train	4%	21%	1%
HST/Thalys/Eurostar	0%	1%	0%
Coach	0%	3%	0%
Aircraft	0%	0%	0%
Camper van	3%	0%	4%
Other	1%	1%	3%
Total	**100%**	**100%**	**100%**

The Dutch visitor usually books his accommodation in Flanders before leaving home. The percentage varies from 97% for a holiday at the seaside to 89% for a holiday in the countryside. Although the percentage booked on location is low, the 11% recorded for the Flemish countryside is a great deal lower than the percentage recorded for the Belgians. The person through whom the Dutch visitor books varies according to destination. On the coast and in the countryside they generally book directly through the operator, being 77% and 61% of holidays respectively. In the art cities the share is no more than 35%. One fifth of Dutch holidays on the coast are booked through an agent. In a little over half of the cases this is through a booking site or online travel agent. Travel agents and tourist rental agencies share the remainder. In the Flemish countryside the share taken by the agents is a little larger than on the coast, at 28%. There, the share is more or less evenly spread across booking sites, travel agencies and other. The category “other” refers in half of the cases to a tourist board. In the art cities the agency market plays a much greater role. It is used by 57% of Dutch city trippers. Booking sites and online travel agents (such as booking.com, or hotels.com) dominate this market by more than two thirds. 40% of all Dutch city holidays in Flanders are therefore booked via an OTA.
Websites, run by an agent or operator, are the most frequently used for bookings.

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

	Coast	Art cities	Flemish countryside
Not booked in advance	3%	8%	11%
Directly through the operator	77%	35%	61%
Through an agent:	20%	57%	28%
Booking site, online travel agent	11%	40%	10%
Travel agency, tour operator	4%	14%	9%
Tourist rental agency	5%	0%	0%
Other	0%	3%	10%
Total	**100%**	**100%**	**100%**

4. Information sources

Dutch tourists in the art cities do their research in advance more than the other destinations. They also consult the most sources, on average 1.5. This is low compared to the other nationalities in the art cities. Only the Belgian city tripper is less well informed. The source most frequently used by all three destinations is without doubt the Internet, varying from 50% in the Flemish countryside to 60% in the art cities. Informal channels take second place in the art cities and on the coast. In the countryside they play a small role. Here, printed matter is important. With a score of 19%, this source comes in second place. In the Flemish countryside, printed sources are clearly still used. For the other destinations this source is of lesser impact. The Dutch city tripper, on the other hand, is quite strongly influenced by the media and belongs to the market that uses travel guides.

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

	Coast	Art cities	Flemish countryside
No research/Past experience	29%	14%	38%
Research in advance	71%	86%	62%
Total	**100%**	**100%**	**100%**
Details checked in advance (overall basis):			
Online information and websites	57%	60%	50%
TV, radio or press	1%	18%	2%
Informal channels (family, friends and	17%	30%	8%
Brochures, folders, printed matter	7%	11%	19%
Travel guide, tourist guide	0%	10%	0%
Other information	9%	4%	3%

5. Activities

On average the Dutch tourist does 5 activities frequently during his stay at the seaside. The most popular activity among the Dutch is enjoying a beverage on a café terrace, 70% do this frequently during their stay at the seaside. 69% rest and 67% go for a walk on the seafront. Another 65% go to the restaurant. Going out to eat is high compared with the other nationalities, whereas the proportion that go walking on the seafront is the lowest of all markets.

Besides these frequent activities there are activities that take place just once or twice while on holiday. Half the Dutch tourists went on a day excursion to another coastal area. 23% also visited a town or village in the hinterland and one fifth visited an attraction. This is much more than the others.

More than 90% of the Dutch tourists in the art cities go walking around the city centre. Three quarters enjoy a beverage on a café terrace and seven in ten go a restaurant. In fourth place we have shopping (61%). What is striking is the relatively low scores when it comes visiting the attractions. In most other markets, interest in tourist attractions is higher.

Looking at excursions, we see that just 10% of Dutch city trippers went on an excursion. Only among the Belgians does this figure come out even lower. For the Dutch tourist, some of this specific behaviour is due to the high number of return visits to cities such as Antwerp.

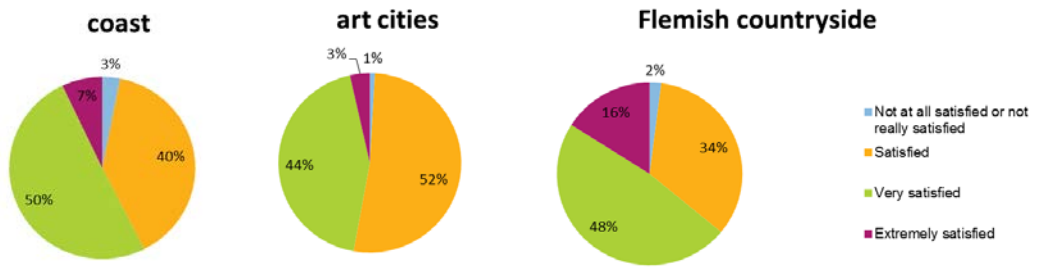
In the Flemish countryside, the most frequently undertaken activity is walking (56%). Enjoying a beverage on a café terrace or at a café follows very closely at 55%. Half of all Dutch tourists simply relaxed. Swimming and shopping each accounted for 40%, only then followed by cycling for 34% of the Dutch tourists.

The survey asked about excursions in the countryside too. It shows that 48% of Dutch tourists took a trip to another town or another place in Flanders.

6. Satisfaction and return visit

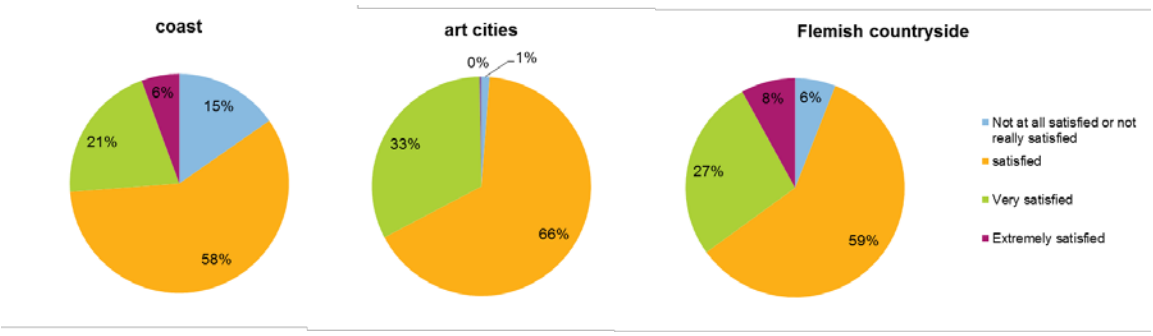
Dutch tourists are the most satisfied with their holiday in the Flemish countryside. Almost half are very satisfied and 16% extremely satisfied. This gives a score of 3.8 out of 5 in the countryside. On the coast, 57% are very satisfied to extremely satisfied. With this, the coast scores 3.6. A little more than half of the Dutch city trippers are satisfied and a little less than half (47%) are more than satisfied in the art cities. The figure for unsatisfied is smaller here than in the other destinations. The art cities score 3.5 out of 5, the highest score in all markets.

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



Dutch holidaymakers at the seaside are the least satisfied with value for money. However, this relates only to an evaluation of the accommodation. They give a score of 3.1 out of 5. Only 27% are very satisfied to extremely satisfied, which is the lowest of all the markets, and in no other market is the proportion of tourists dissatisfied with the value for money of the accommodation so high. The Dutch are the most satisfied with value for money in the Flemish countryside and the art cities. They give scores of 3.3 out of 5 for both. In the countryside, 27% are very satisfied and 8% extremely satisfied with the value for money. In the art cities there is no group of extremely satisfied and there is only a small group of not satisfied. Two thirds are satisfied and the other third is very satisfied with the value for money of their holiday in the city they chose.

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



*Accommodation only for the coast

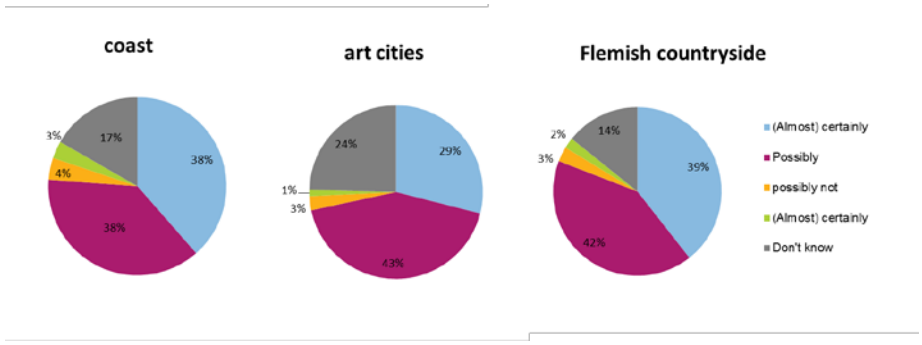
In each of the destinations half, and at times more than half, of the Dutch tourists can be considered as return visitors. Almost six in ten Dutch city trippers had already been to one of the art cities. Only Belgians do better here. On the coast, half had already been before. This is the lowest of all nationalities on the coast. Of the tourists in the Flemish countryside, 52% had been on holiday in Flanders in the last three years.

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

Coast	50%	in the last 3 years
Art cities	58%	in the last 5 years
Flemish countryside	52%	in the last 3 years

All three destinations can count on a great many Dutch tourists who would be happy to return. In the Flemish countryside, 81% would possibly to almost certainly return. On the coast the percentage is 76% and for the art cities it is 72%. On the coast the proportion is clearly lower than the other nationalities, but there is still a high intent. In the art cities, on the other hand, this is the highest share. In particular, the share of Dutch tourists that will almost certainly return is high, whereas this share on the coast is below the other markets. In the art cities, there is a strikingly low share of don't knows, a group that is extremely big among many other markets. These figures for the art cities confirm the loyalty of the Dutch public, as already reflected in the actual return visit.

Figure 26: Return visit* planned by the Dutch overnight leisure tourist in Flanders



*Within 3 years

7. Spending

The Dutch tourist spends on his holiday on the coast an average of 68 euros per person per night. Of this, 29 euros are spent on accommodation and 26 on meals, food and drinks. Another 9 euros are spent on shopping. In the Flemish countryside he spends exactly the same amount as on the coast. Accommodation is a greater expense here, whereas less is spent on eating and shopping.

In the art cities the Dutch tourist spends appreciably more, being almost twice the amount spent on the coast and in the countryside. At 131 euros per person per night, however, he remains 10 euros below the overall average in the cities. Food, accommodation and shopping are the main spending categories, in that order.

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

Spend, per person per night (euros)	Coast	Art cities	Flemish countryside
Accommodation	29	40	34
Meals, food and drinks	26	50	21
Attractions and entertainment	3	6	3
Shopping	9	32	6
Travel	1	3	3
Other spending	0	0	0
Total	**68**	**131**	**68**

D. 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&b's 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) or contact kennisbeheer@toerismevlaanderen.be.

E. LIST OF FIGURES AND TABLES

July 2014