



Flanders
State of the Art

REPUTATION STUDY FLANDERS 2017

Mature Markets
Europe + US & Japan



VISITFLANDERS

THE STORY LINE



What do travellers
KNOW & how do they
EXPERIENCE Flanders?



How is Flanders
CONNECTED to
travellers?

METHODOLOGY



Online research
in **13 mature
markets**



People
who have
**travelled
abroad** in
the past 3
years

1,000
completes
per
country



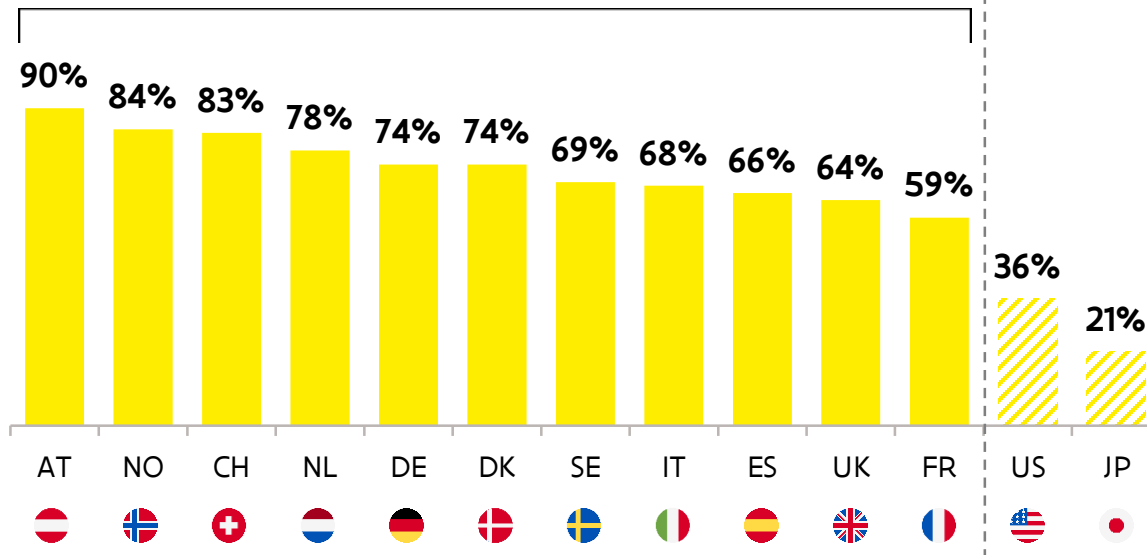
Results are
**representatively
weighted**
(socio demographics
+ by market)



TOTALS are made for the
sum of the European markets,
comparison can be made per
market and with US and Japan

PROPORTION OF POPULATION THAT TRAVELLED ABROAD IN THE PAST 3 YEARS DIFFERS GREATLY PER COUNTRY.

If totals are shown, they are for this group of European countries



NON EUROPEAN RESIDENTS TRAVEL LESS ABROAD.

IN DEPTH RESULTS



THE STORY LINE



What do travellers **KNOW** &
how do they **EXPERIENCE**
Flanders?

- How well do travellers know the region(s), the cities, the country?
- Do they know the USP 's of Flanders?
- How do travellers perceive Flanders? (Associations with Flanders)
- How was their journey experience?



How is Flanders **CONNECTED** to
travellers?

- What is the visit intention? For what type of journey?
- How well are travellers connected to Flanders? Which relationship do they have with Flanders?

KNOWLEDGE AND EXPERIENCE OF FLANDERS

KNOWLEDGE OF:

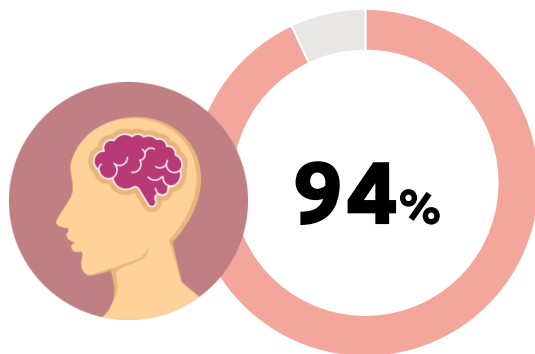
THE REGION(S), THE CITIES,
THE COUNTRY AND THE USP'S

ASSOCIATIONS
WITH FLANDERS

THE JOURNEY
EXPERIENCE

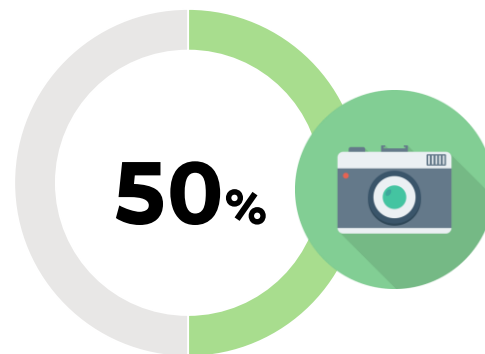


ABOUT 5 OUT OF 10 EUROPEAN TRAVELLERS HAVE **VISITED** FLANDERS/BRUSSELS OR A CITY WITHIN FLANDERS. MORE THAN 9 OUT OF 10 ARE (QUITE) FAMILIAR WITH FLANDERS.



FAMILIAR*

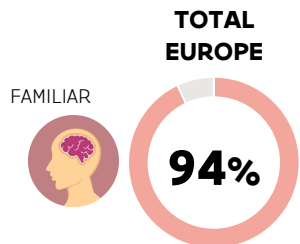
% that visited or are very familiar with



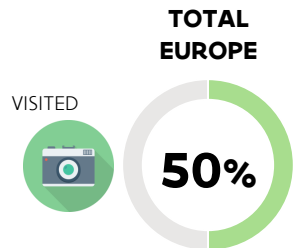
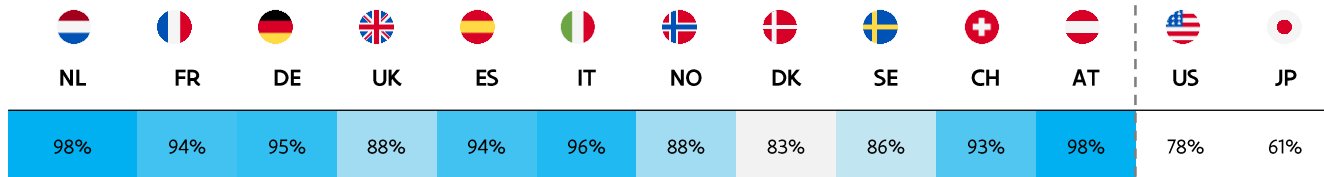
VISITED

% that visited.

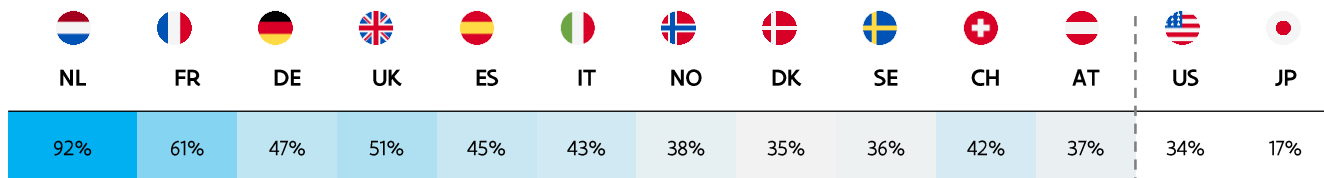
PEOPLE FROM THE **NEIGHBOURING COUNTRIES** HAVE VISITED FLANDERS (OR A CITY WITHIN FLANDERS) THE MOST AND ARE QUITE FAMILIAR WITH FLANDERS.



Flanders, or Brussels or one of the other cities



Flanders, or Brussels or one of the other cities

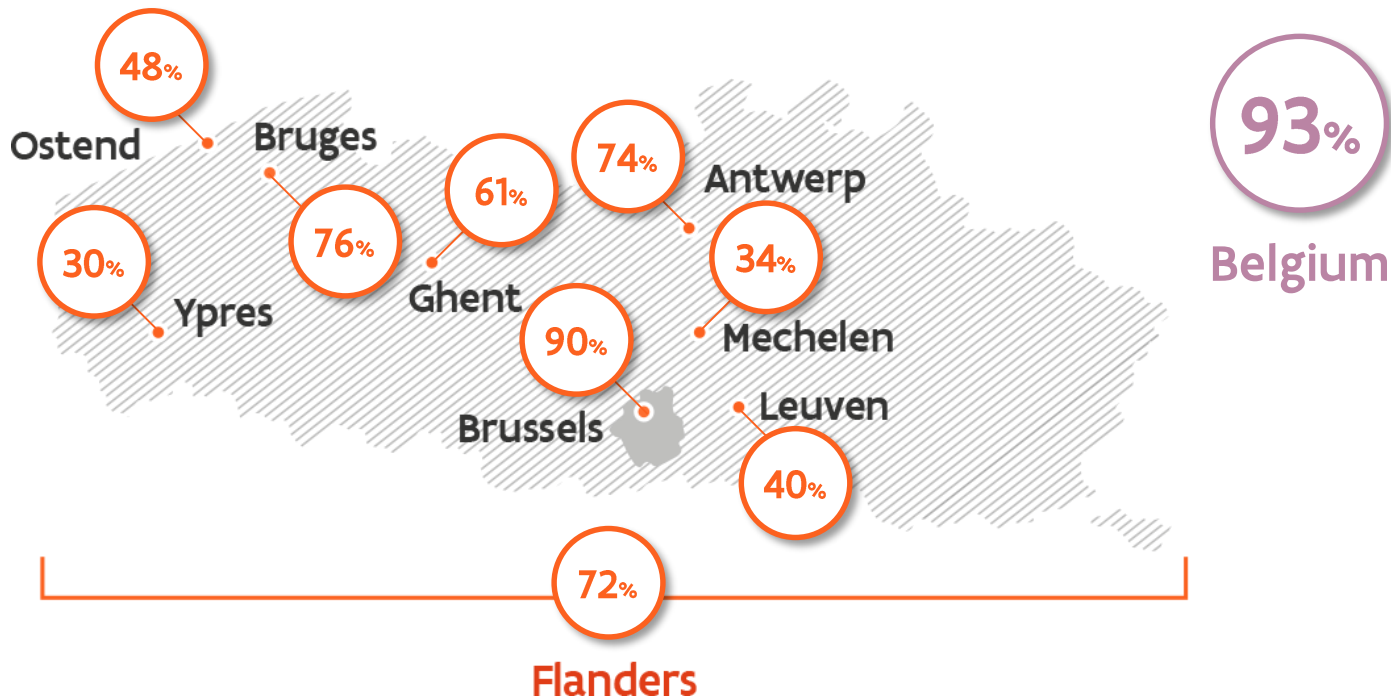


VISITFLANDERS

Base: European market – all travellers

Q1. Are you familiar with one of the following regions/cities? % that visited.

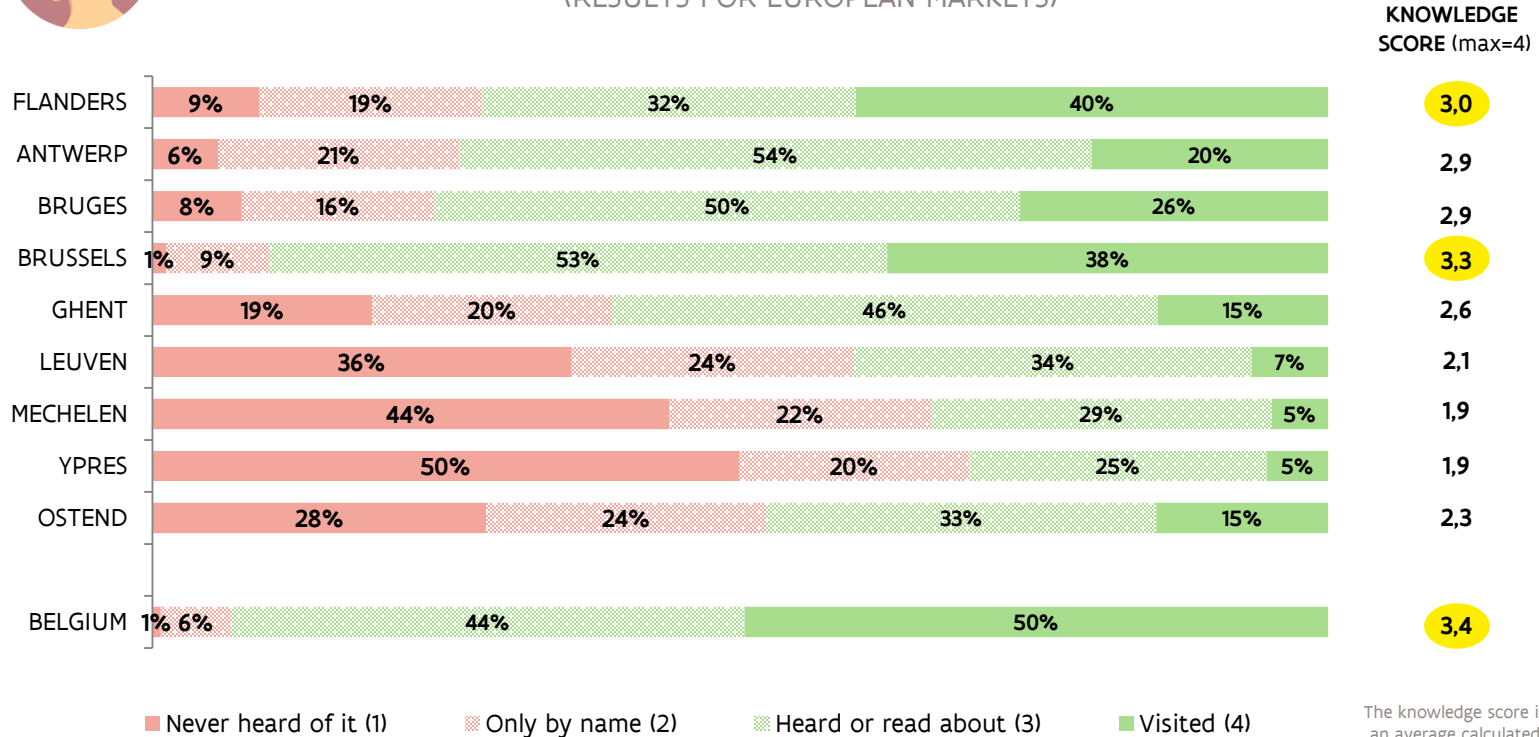
FAMILIARITY WITH BELGIUM, BRUSSELS, FLANDERS AND THE MOST IMPORTANT CITIES (EUROPEAN MARKETS)





FAMILIARITY IS HIGHEST WITH BELGIUM, BRUSSELS AND FLANDERS. MECHELEN AND YPRES ARE THE LEAST KNOWN.

(RESULTS FOR EUROPEAN MARKETS)



The knowledge score is an average calculated from the answer scale (used scores mentioned next to the legend points)

% THAT KNOWS (is familiar with) FLANDERS, BRUSSELS OR ONE OF THE (ART) CITIES (heard/read about it, or visited)



separate scores/city or region:

	TOTAL EUROPE	NL	FR	DE	UK	ES	IT	NO	DK	SE	CH	AT	US	JP
FLANDERS	72%	97%	76%	72%	57%	76%	79%	51%	46%	49%	69%	79%	40%	33%
Antwerp	74%	97%	70%	83%	57%	73%	76%	62%	52%	60%	75%	90%	41%	36%
Bruges	76%	95%	81%	79%	67%	87%	71%	54%	46%	51%	67%	82%	36%	25%
Brussels	90%	97%	90%	93%	81%	91%	93%	83%	78%	84%	91%	97%	71%	56%
Ghent	61%	94%	55%	71%	50%	69%	47%	51%	38%	56%	61%	74%	36%	16%
Leuven	40%	85%	46%	44%	28%	43%	28%	32%	23%	32%	40%	45%	27%	15%
Mechelen	34%	83%	35%	40%	20%	31%	25%	28%	20%	30%	35%	41%	26%	9%
Ypres	30%	65%	34%	30%	41%	23%	20%	20%	14%	18%	23%	25%	26%	7%
Ostend	48%	81%	50%	60%	49%	31%	32%	31%	25%	33%	46%	61%	26%	9%
BELGIUM	93%	99%	95%	97%	85%	95%	93%	91%	84%	88%	93%	99%	76%	83%

% THAT VISITED FLANDERS, BRUSSELS OR ONE OF THE (ART) CITIES (heard/read about it, or visited)



separate scores/city or region:

	TOTAL EUROPE	NL	FR	DE	UK	ES	IT	NO	DK	SE	CH	AT	US	JP
FLANDERS	40%	91%	48%	38%	45%	38%	28%	30%	21%	25%	30%	27%	28%	12%
Antwerp	20%	80%	21%	19%	14%	18%	14%	16%	11%	15%	15%	14%	10%	7%
Bruges	26%	59%	37%	21%	30%	31%	17%	12%	11%	13%	16%	16%	12%	8%
Brussels	38%	67%	51%	32%	33%	38%	34%	26%	28%	31%	34%	30%	22%	15%
Ghent	15%	52%	18%	11%	13%	17%	8%	10%	5%	10%	10%	12%	11%	4%
Leuven	7%	26%	9%	5%	6%	5%	4%	6%	3%	4%	5%	4%	10%	2%
Mechelen	5%	21%	5%	4%	5%	3%	3%	4%	2%	3%	3%	2%	11%	1%
Ypres	5%	13%	9%	2%	12%	2%	3%	4%	2%	2%	2%	1%	7%	1%
Ostend	15%	36%	18%	19%	19%	5%	5%	8%	6%	8%	10%	14%	10%	2%
BELGIUM	50%	97%	64%	52%	46%	41%	37%	33%	38%	39%	42%	36%	24%	16%

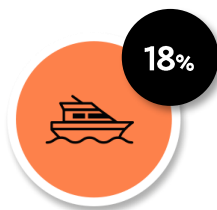


IMPORTANT REMARK

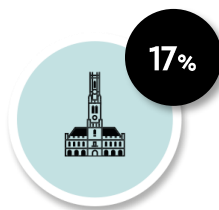
Following results are based on people who are **FAMILIAR** with Flanders or a city in Flanders.



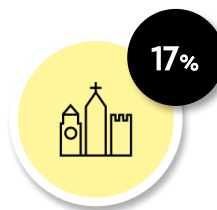
SPONTANEOUS ASSOCIATIONS WITH “FLANDERS” (TOTAL EUROPE)



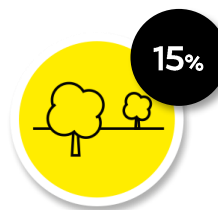
HARBOUR,
SHIP



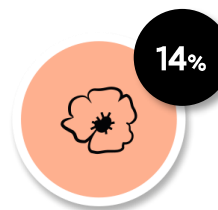
HERITAGE
(HISTORIC BUILDINGS)



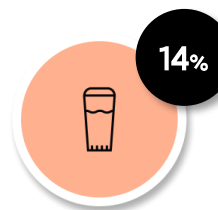
CITY (GENERAL),
OLD CITIES



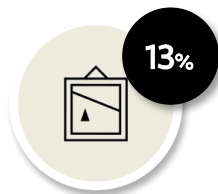
NATURE &
BEAUTIFUL LANDSCAPES



(FIRST AND SECOND)
WORLD WAR



BEER



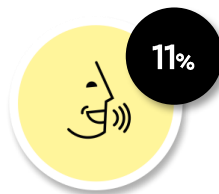
ART AND
ARTISTS, MUSEUM



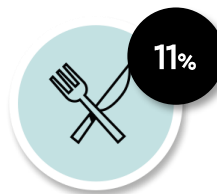
HISTORY/
CULTURE



BEACH/
COAST



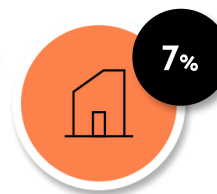
LANGUAGE/
ACCENT (DUTCH)



TASTY FOOD
& DRINKS
















CHOCOLATE
& PRALINES



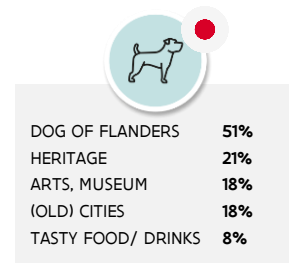
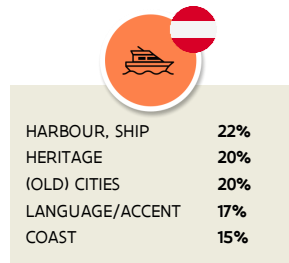
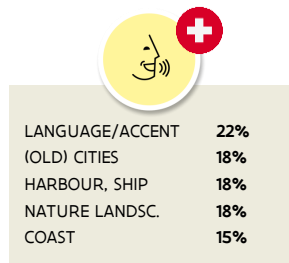
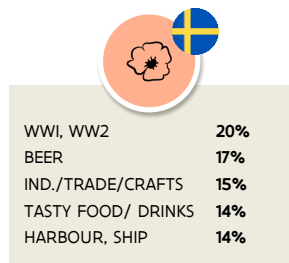
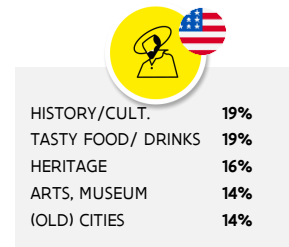
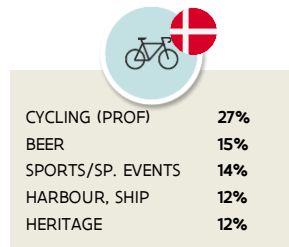
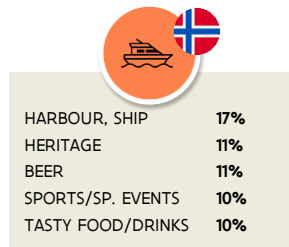
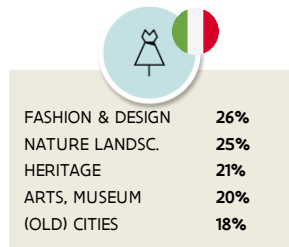
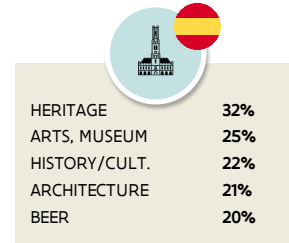
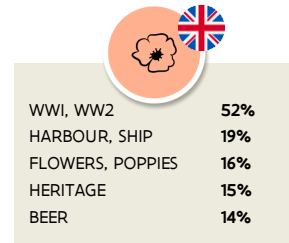
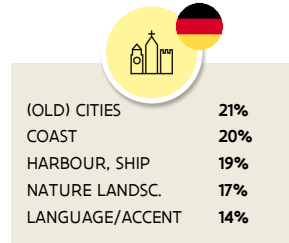
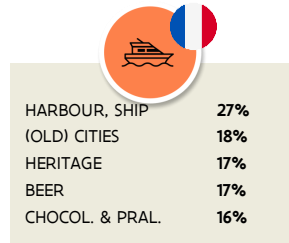
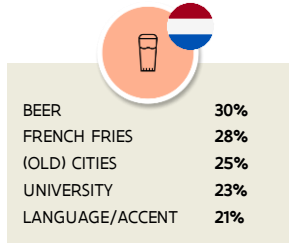
ARCHITECTURE

SPONTANEOUS ASSOCIATIONS WITH “FLANDERS” DIFFER GREATLY FROM COUNTRY TO COUNTRY (OPEN-ENDED QUESTION)

	TOTAL EUROPE	 NL	 FR	 DE	 UK	 ES	 IT	 NO	 DK	 SE	 CH	 AT	 US	 JP
Harbour, ship	18%	11%	27%	19%	19%	16%	13%	17%	12%	14%	18%	22%	8%	6%
Heritage (historic buildings and	17%	10%	17%	12%	15%	32%	21%	11%	12%	13%	12%	20%	16%	21%
City (general), old cities	17%	25%	18%	21%	6%	13%	18%	7%	10%	6%	18%	20%	14%	18%
Nature & beautiful landscapes	15%	3%	16%	17%	7%	14%	25%	6%	6%	9%	18%	13%	8%	4%
(First and second) world war	14%	20%	7%	8%	52%	6%	7%	4%	11%	20%	6%	5%	13%	1%
Beer	14%	30%	17%	6%	14%	20%	11%	11%	15%	17%	9%	6%	11%	5%
Art and artists, museum	13%	9%	13%	6%	7%	25%	20%	7%	6%	9%	11%	9%	14%	18%
History/culture	13%	8%	10%	13%	8%	22%	16%	8%	4%	5%	9%	12%	19%	5%
Beach/coast	13%	21%	14%	20%	4%	10%	7%	6%	5%	7%	15%	15%	6%	1%
Language/accents (Dutch)	11%	21%	13%	14%	6%	11%	4%	8%	7%	9%	22%	17%	7%	3%
Tasty food & drinks	11%	13%	7%	13%	10%	17%	9%	10%	4%	14%	8%	10%	19%	8%
Chocolate & pralines	9%	8%	16%	6%	9%	16%	5%	3%	11%	3%	7%	5%	7%	8%
Architecture	7%	3%	8%	3%	6%	21%	6%	4%	2%	1%	5%	5%	6%	5%

SPONTANEOUS ASSOCIATIONS WITH FLANDERS

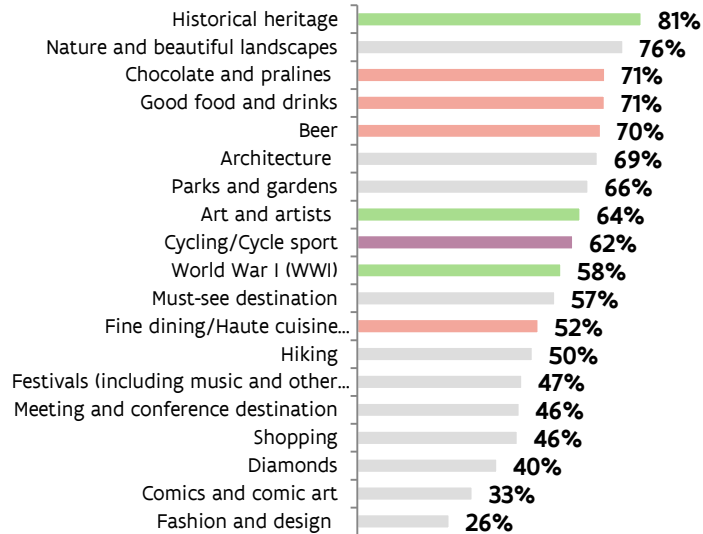
top 5 per market -> very different / country



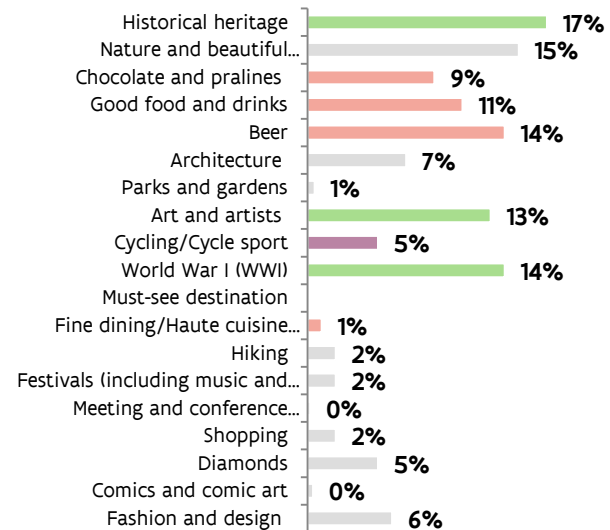
OPEN-ENDED VS CLOSED-ENDED ASSOCIATION

Flanders is quite often associated with historical heritage, nature, chocolate & pralines and food & drinks.
Associations with fashion and diamonds are made less often.

AIDED ASSOCIATION



SPONTANEOUS ASSOCIATION





FAMILIARITY



is familiar with Flanders or a city in Flanders



visited Flanders or a city in Flanders

KNOWLEDGE GEOGRAPHICALLY

The highest knowledge scores:

- 1 The country Belgium
- 2 The city of Brussels
- 3 The region Flanders

INSIGHTS ON KNOWLEDGE

KNOWLEDGE USP'S

Spontaneously Flanders is quite often associated with **historical heritage, nature and beautiful landscapes, WWI, beer and art & artists.**

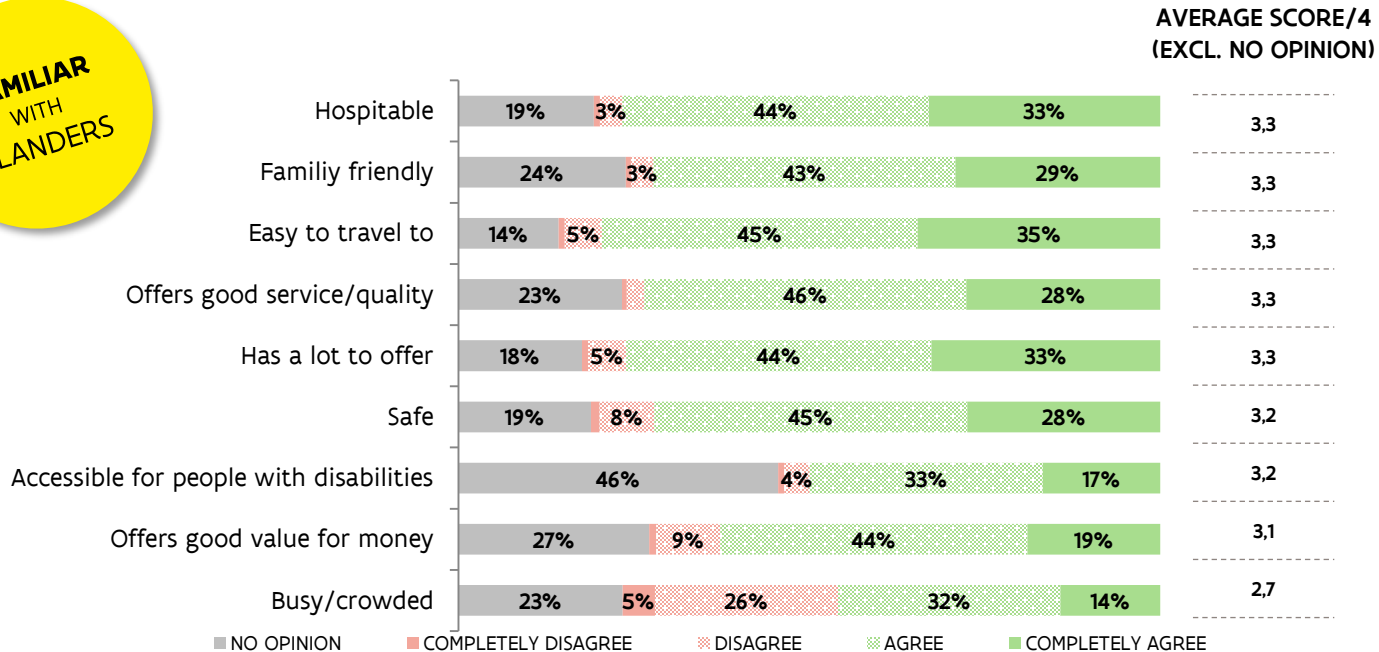
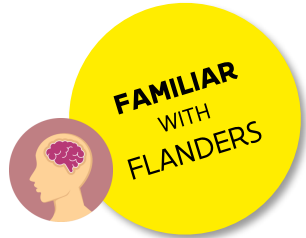
Spontaneous associations with **parks & gardens, festivals and gastronomy** are less common.



Spontaneous awareness with "Flanders" differs greatly from country to country.

The familiarity with 'Flanders or one of the (art) cities' is much higher (**94%**) than the familiarity with the brand 'Flanders' (**72%**).

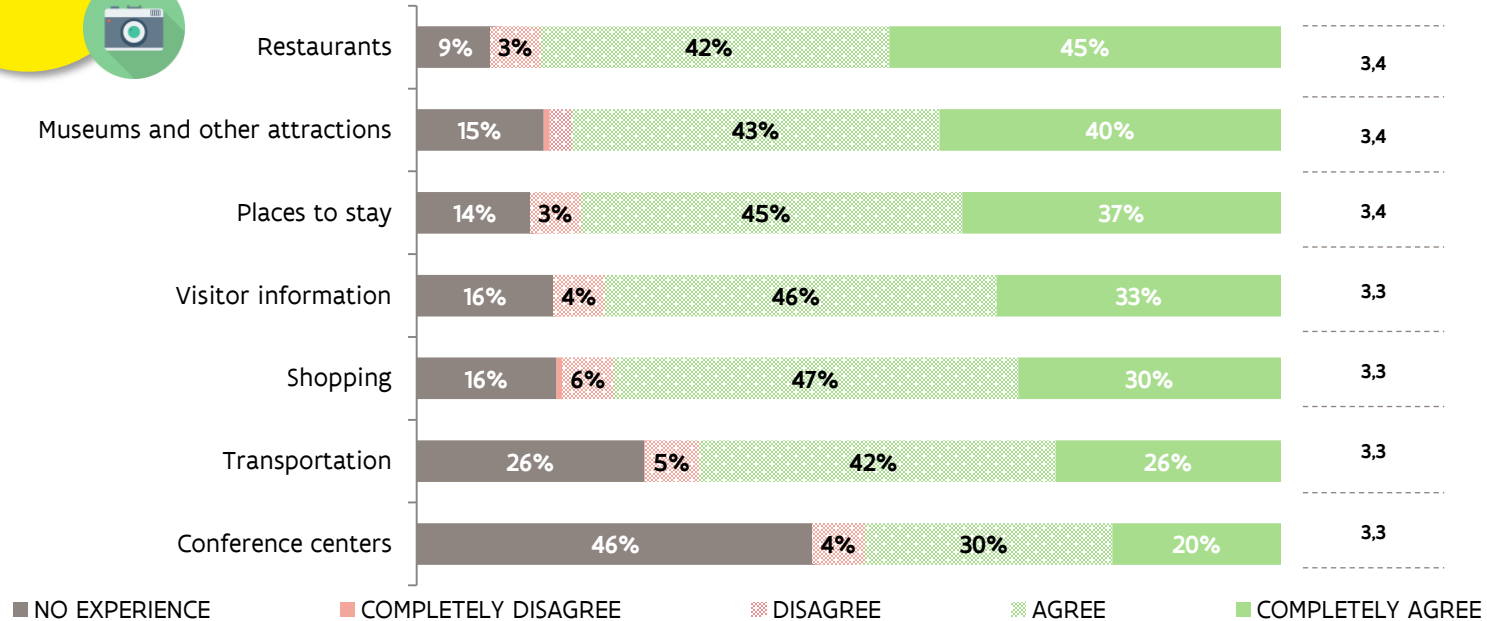
Knowledge about Flanders (or a city) is quite high. The closer a country, the better the knowledge is about different aspects on Flanders



Most people are convinced that Flanders has **a lot to offer**, is hospitable and is **easy to travel to**.
Almost 1 out of 2 people agree with the statement that Flanders is a **busy/crowded region**.



AVERAGE SCORE/4
(EXCL. NO OPINION)



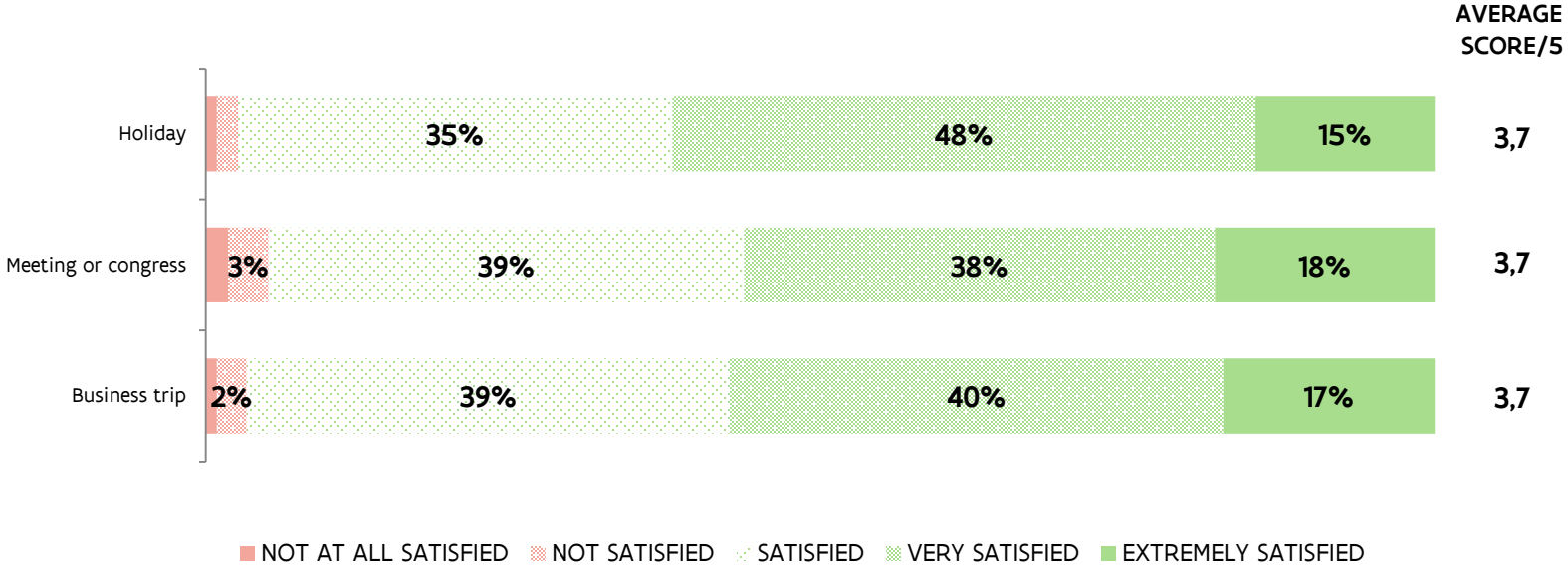
People who visited Flanders in the past are – in general – **very satisfied with the service** they received during their stay.

Base: European market – all travellers who VISITED Flanders in the past

Q15. You mentioned that you stayed before in Flanders. Can you further explain your evaluation on the service during your most recent stay in Flanders?

Based on your experience on your most recent stay in Flanders, to which extent do you agree/disagree with each statement, Flanders offers a good service in terms of ...

THE GENERAL SATISFACTION LEVEL ABOUT THE LAST VISIT IS RELATIVELY HIGH.



INSIGHTS ON EXPERIENCE

EVALUATION/IMAGE

Travellers are very positive about Flanders, even when they've never visited



- Hospitable
- Family friendly
- Easy to travel to
- Good service/quality
- A lot to offer

SERVICE LEVEL

People who visited are very positive about the service they received

Restaurants, museums and places to stay are best evaluated



GENERAL SATISFACTION

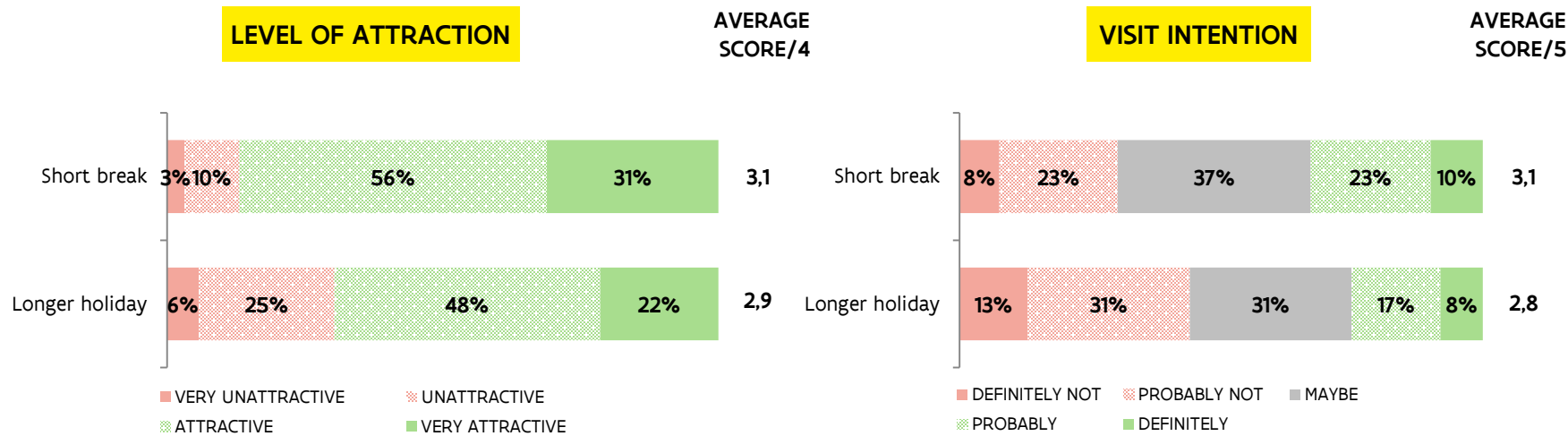
Dissatisfaction level about their last visit is very limited

People in mature markets have a very positive image about Flanders and people who visited are also very positive about the experience they had during their visit

CONNECTION WITH FLANDERS

- THE VISIT INTENTION

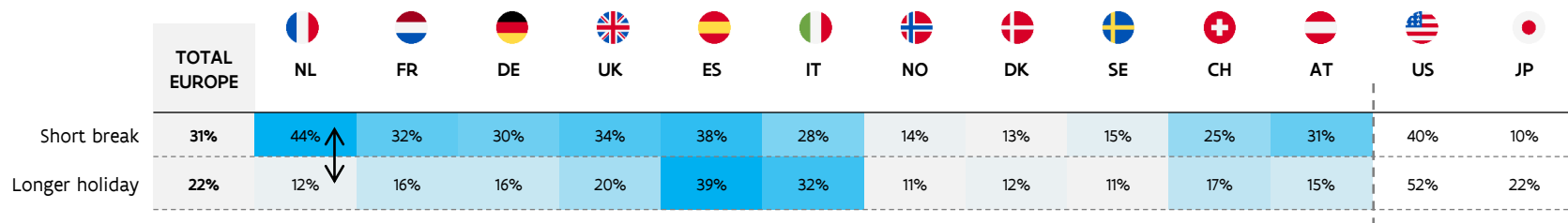




Attraction level is quite high for short breaks.
 Almost one in three will (probably) not visit Flanders in the next 3 years.

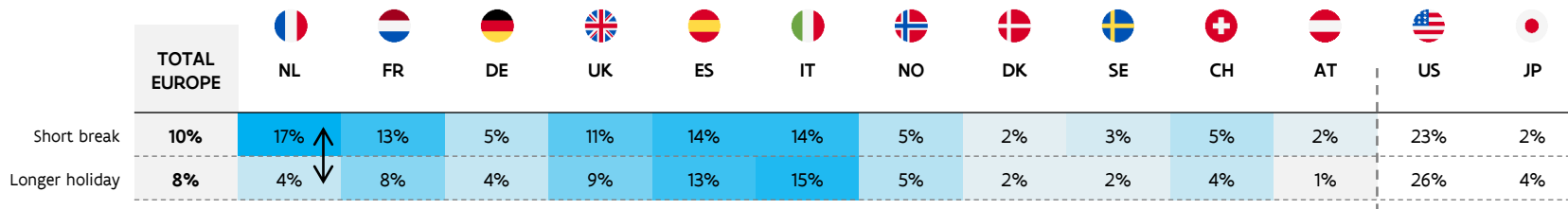
LEVEL OF ATTRACTION

% VERY ATTRACTIVE



VISIT INTENTION

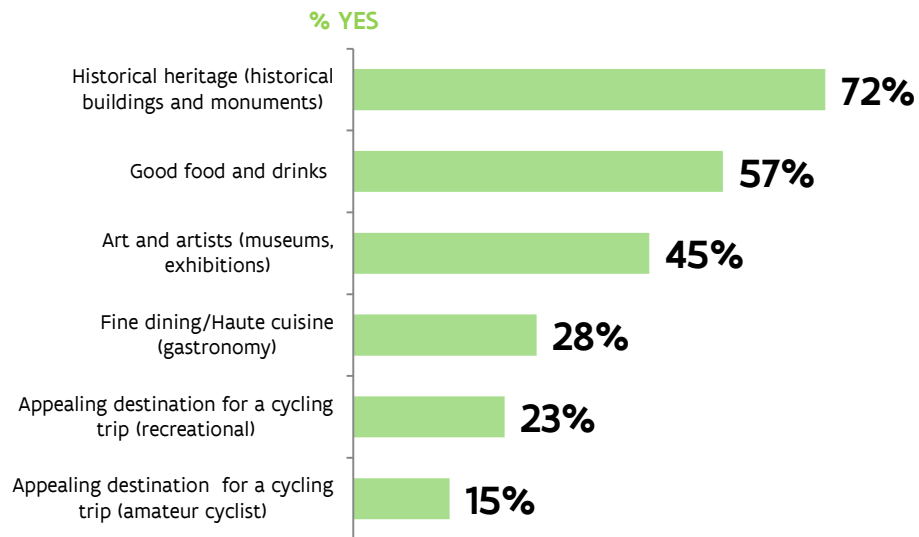
% DEFINITELY



Flanders' attraction level is highest in Spain and USA.

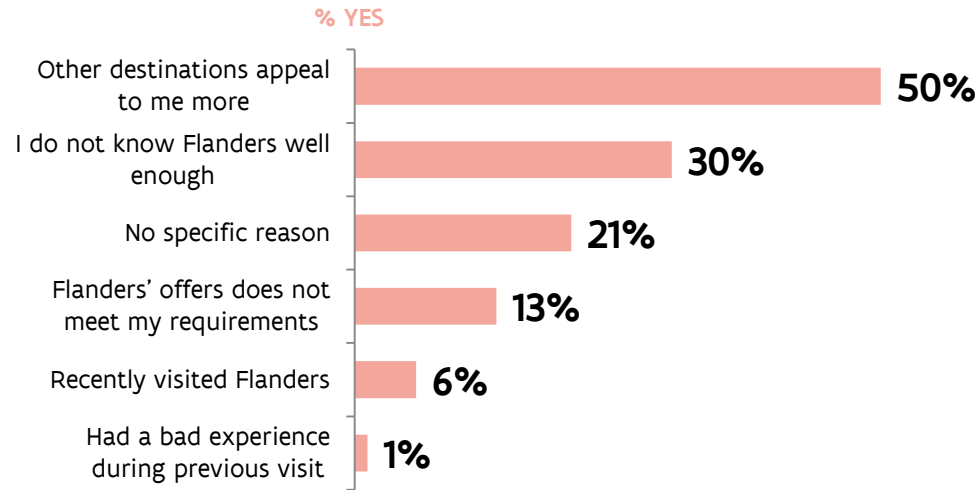
Dutch people show the biggest difference between short and longer stays: Flanders is only considered as attractive for a short stay and visit intention for long stays is very limited.

TRAVELLERS WITH A VISIT INTENTION



Of all 'assets' that VISITFLANDERS is actively focusing on:
Historical heritage is the main driver to visit Flanders. Food & drinks and art & artists are also important drivers to visit.

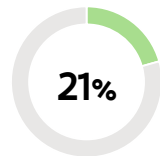
TRAVELLERS WITH NO VISIT INTENTION



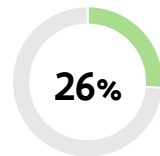
The attraction of other destinations is the main reason why people don't visit Flanders.
A limited knowledge of Flanders is another important reason.

	TOTAL EUROPE	NL	FR	DE	UK	ES	IT	NO	DK	SE	CH	AT	US	JP
Flanders	21%	9%	12%	20%	26%	22%	28%	24%	16%	19%	22%	21%	36%	56%
Brussels	26%	25%	13%	25%	28%	24%	39%	30%	22%	26%	29%	29%	32%	59%
Belgium	21%	8%	12%	20%	26%	23%	30%	27%	17%	21%	24%	22%	32%	57%

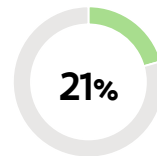
TOTAL EUROPE



FLANDERS



BRUSSELS



BELGIUM

1 out of 4 (or less) European travellers would avoid visiting Flanders, Belgium or Brussels because of the terror attacks in 2016. In Japan, the USA and Italy, however, this percentage is significantly higher.

INSIGHTS ON VISIT INTENTION

VISIT INTENTION

1 out of 3

European travellers would (probably) visit Flanders in the next 3 years,

1 out of 3

would not visit Flanders

Americans have the highest visit intention, while Dutch people would only visit for a short stay, but not for a longer holiday

ASSETS & BARRIERS

Main assets (of VISITFLANDERS focus) = Heritage & Food and Drinks & Art.



The attraction level of other destinations is the main barrier not to visit Flanders. This barrier is greatest in The Netherlands and France. Note that a lack of knowledge about the region is a second important barrier.

IMPACT OF TERROR ATTACKS

1 out of 4 (or less) European travellers would avoid traveling to Flanders because of the terror attacks in 2016. This share is higher in the USA and Japan.

