© www.milo-profi.com

Flanders
State of
the Art

Tourism in Figures

2013

the Japanese market in Flanders

VISITFLANDERS

TABLE OF CONTENT

A. ECONOMIC INDICATORS 5

B. THE JAPANESE MARKET IN FLANDERS 7

1. Key figures 7

2. Distribution within Flanders 7

3. Trends 10

4. Motive of stay 14

5. Type of accommodation 15

6. Seasonality 16

7. Country benchmark 18

C. PROFILE OF THE JAPANESE LEISURE MARKET IN FLANDERS 23

1. Profile 23

2. Competitive position and motivation 24

3. Characteristics of the trip 25

4. Information sources 26

5. Activities 26

6. Satisfaction and return visit 27

7. Spending 28

D. CONCEPTS AND DEFINITIONS 29

E. LIST OF FIGURES AND TABLES 30

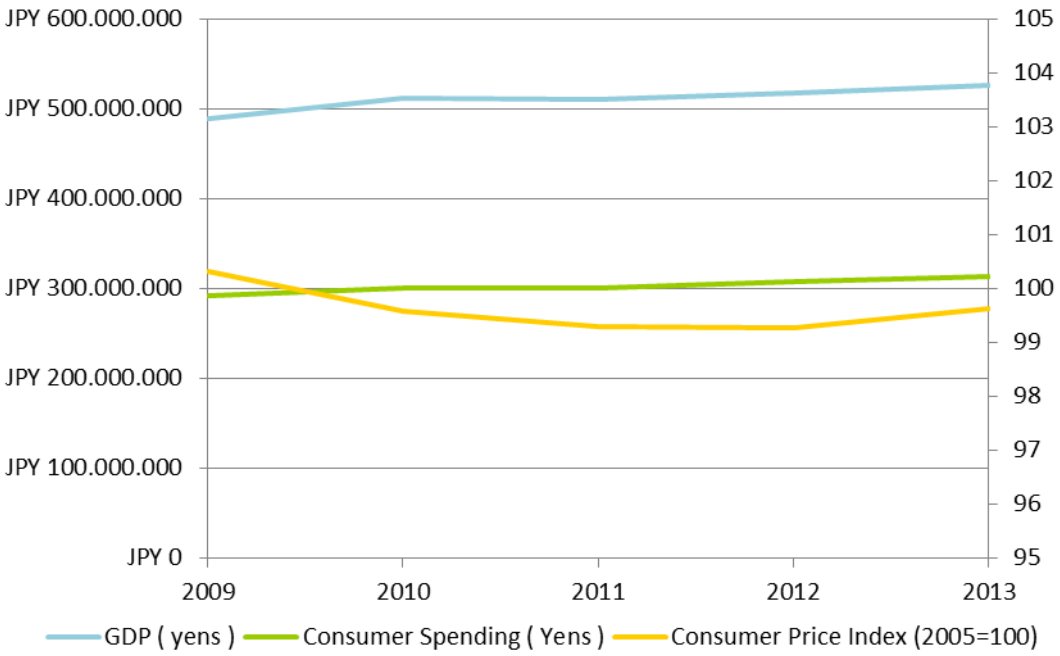
A. ECONOMIC INDICATORS

Table 1: Trend of the Japanese economy 2009-2013

	2009	2010	2011	2012	2013	09-13
GDP, real(x1000 000 yen)	489.339.000	512.253.000	510.120.000	517.469.000	525.425.000	+7,4%
Consumer spending (x1000 000 yen)	292.196.000	300.292.000	301.142.000	307.346.000	313.241.000	+7,2%
Consumer Price Index	100,3	99,6	99,3	99,3	99,6	-0,7%

Source: Tourism Flanders based on TDM

Figure 1: Trend of the Japanese economy 2009-2013



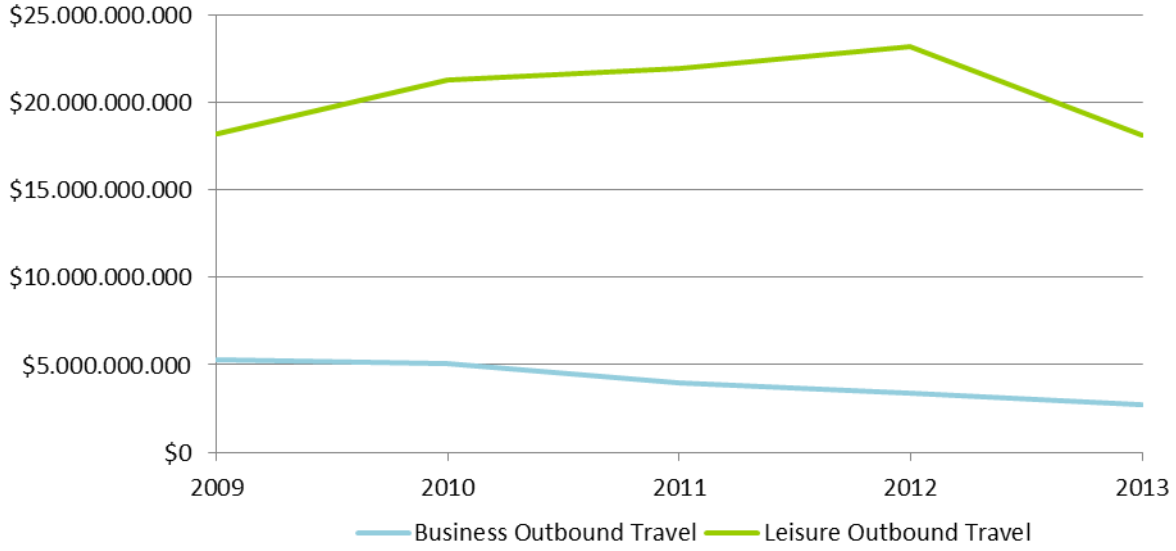
Source: Tourism Flanders based on TDM

Table 2: Trend of the Japanese population 2009-2013

	2009	2010	2011	2012	2013	09-13
Population	127.134.000	126.974.000	126.792.000	126.583.000	126.342.000	-0,6%
Population, 65+	22,0%	22,7%	23,4%	24,1%	24,9%	+2,9*
Unemployment rate	5,1%	5,0%	4,6%	4,3%	4,0%	-1,0*

** in percentage point*
Source: Tourism Flanders based on TDM

Figure 2 Japanese Outbound Travel 2009-2013 (spending, USD)



Source: Tourism Flanders based on TDM

B. THE JAPANESE MARKET IN FLANDERS

1. Key figures

Table 3: Total foreign and Japanese market in Flanders 2013

	Overall total foreign travellers	Japanese travellers	% Japanese	Ranking Japanese market
arrivals	6.488.545	107.869	1,7%	9th
overnight stays	13.742.727	208.694	1,5%	8th
length of stay (nights)	2,1	1,9	-	-

Source: Tourism Flanders based on GDS

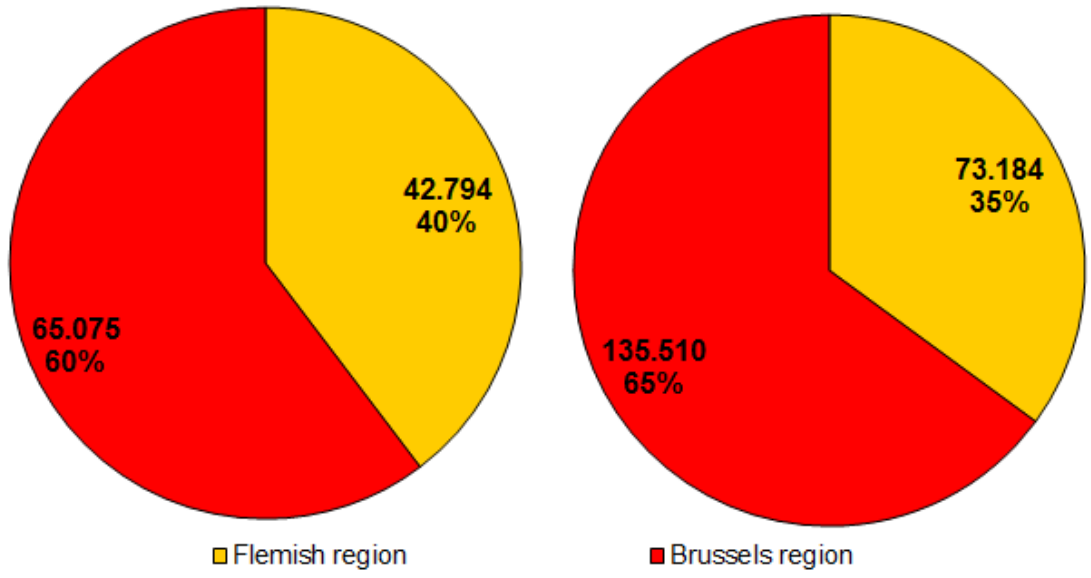
2. Distribution within Flanders

Table 4: The Japanese market in Flanders by region 2013

	arrivals	%	overnights	%
Flemish region	42.794	40%	73.184	35%
Brussels region	65.075	60%	135.510	65%
Flanders	**107.869**	**100%**	**208.694**	**100%**

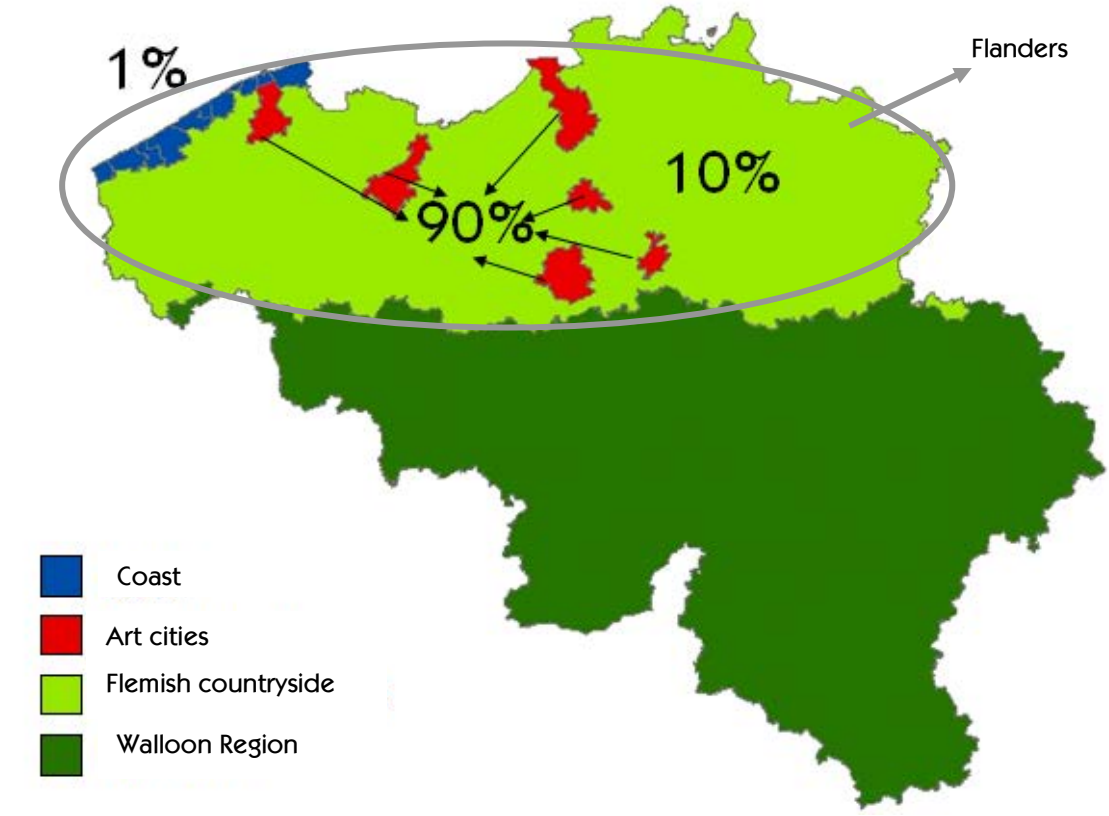
Source: Tourism Flanders based on GDS

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



Source: Tourism Flanders based on GDS

Figure 4: Japanese overnights in Flanders 2013



Source: Tourism Flanders based on GDS

Table 5: The Japanese market in Flanders by destination 2013

	overnights	%
Coast	1.301	1%
Art cities	187.260	90%
Flemish countryside	20.133	10%
Flanders	**208.694**	**100%**

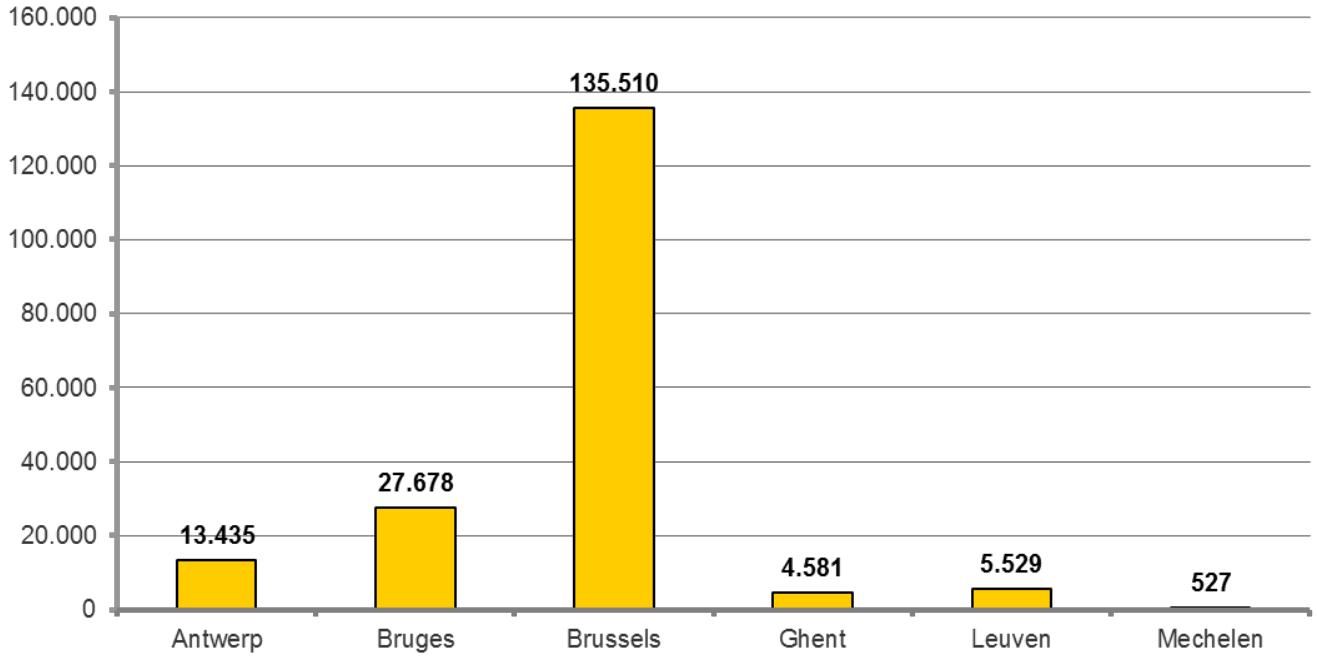
Source: Tourism Flanders based on GDS

Table 6: The Japanese market in the Art cities 2013

	overnights	%
Antwerp	13.435	7%
Bruges	27.678	15%
Brussels	135.510	72%
Ghent	4.581	2%
Leuven	5.529	3%
Mechelen	527	0%
Art cities	**187.260**	**100%**

Source: Tourism Flanders based on GDS

Figure 5: Japanese overnights in the Art cities 2013



Source: Tourism Flanders based on GDS

3. Trends

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

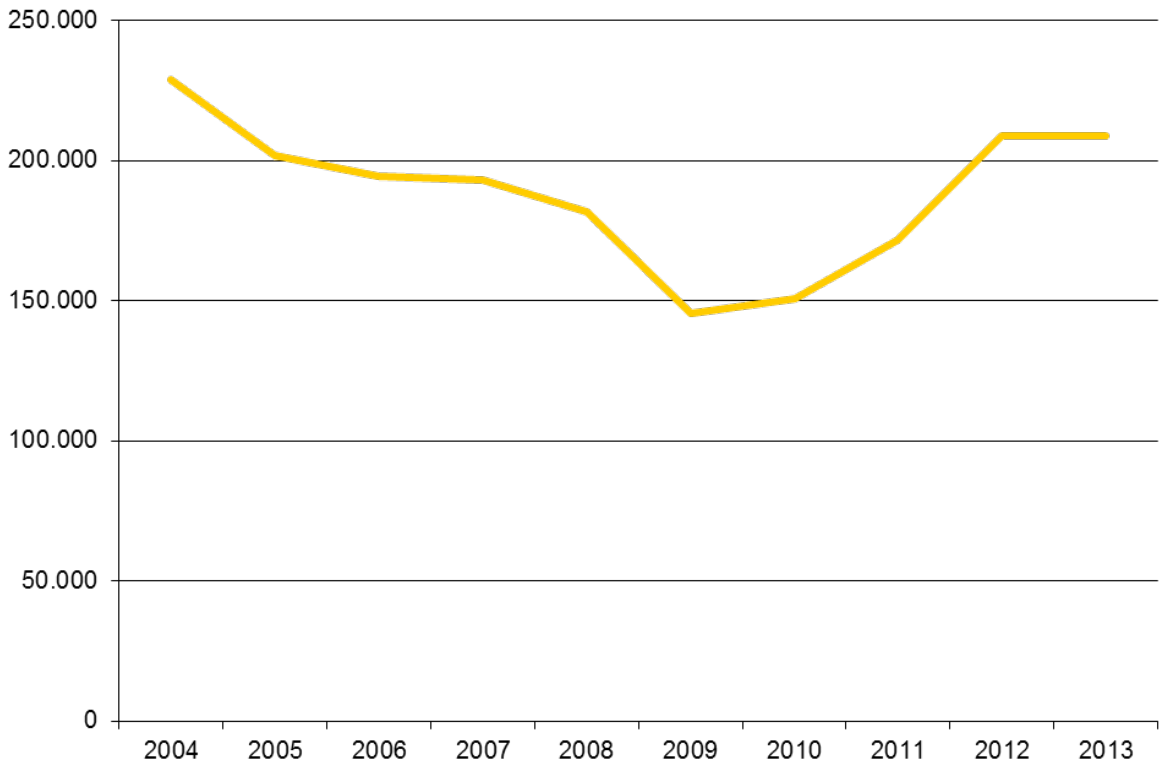
	2004	2005	2006	2007	2008	2009	2010	2011	2012*	2013*	04-13
Overnights (x1.000)	229	202	194	193	182	146	151	172	209	209	-8,8%
Arrivals (x1.000)	120	107	104	103	95	76	77	87	108	108	-9,8%
Aver. length of stay**	1,92	1,90	1,86	1,87	1,91	1,91	1,95	1,97	1,94	1,93	+1,0%

Source: Tourism Flanders based on GDS

**B&Bs included*

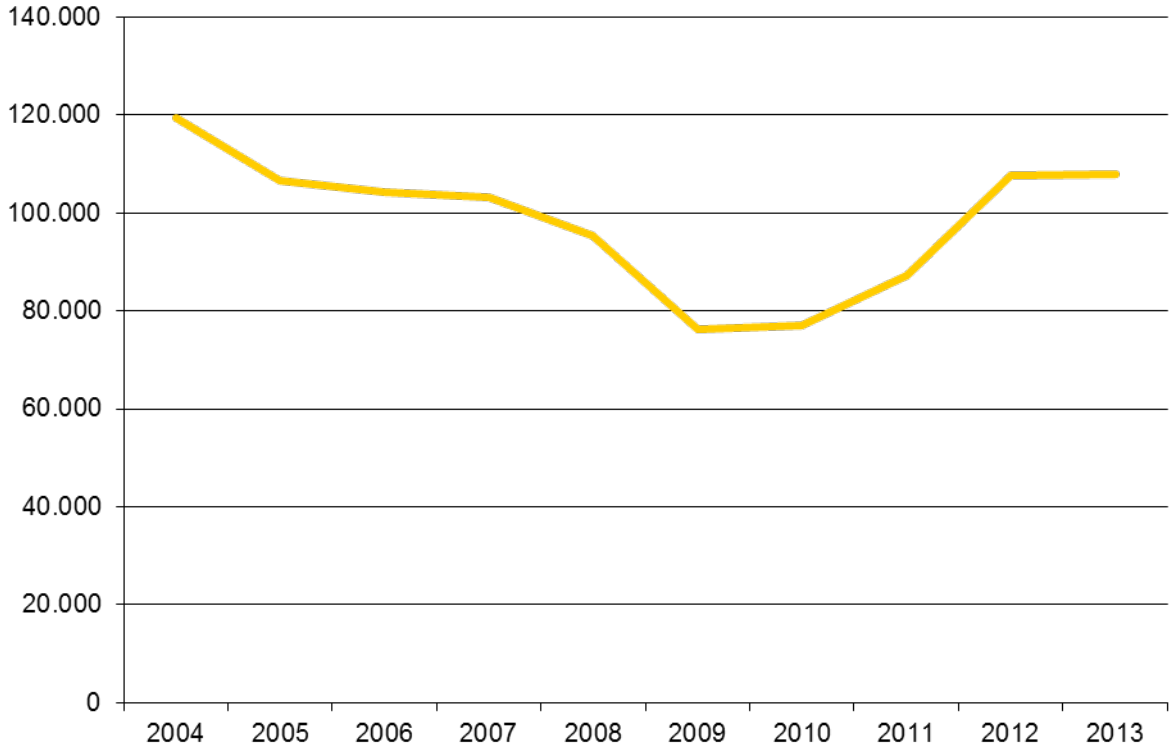
***nights*

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



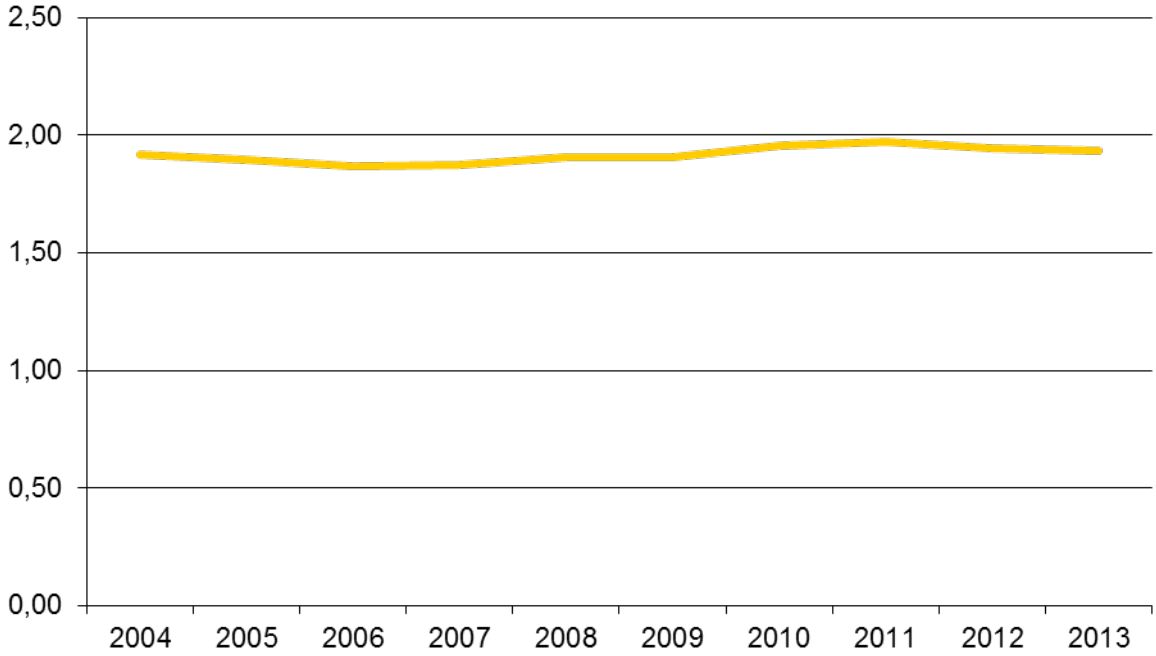
Source: Tourism Flanders based on GDS

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



Source: Tourism Flanders based on GDS

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



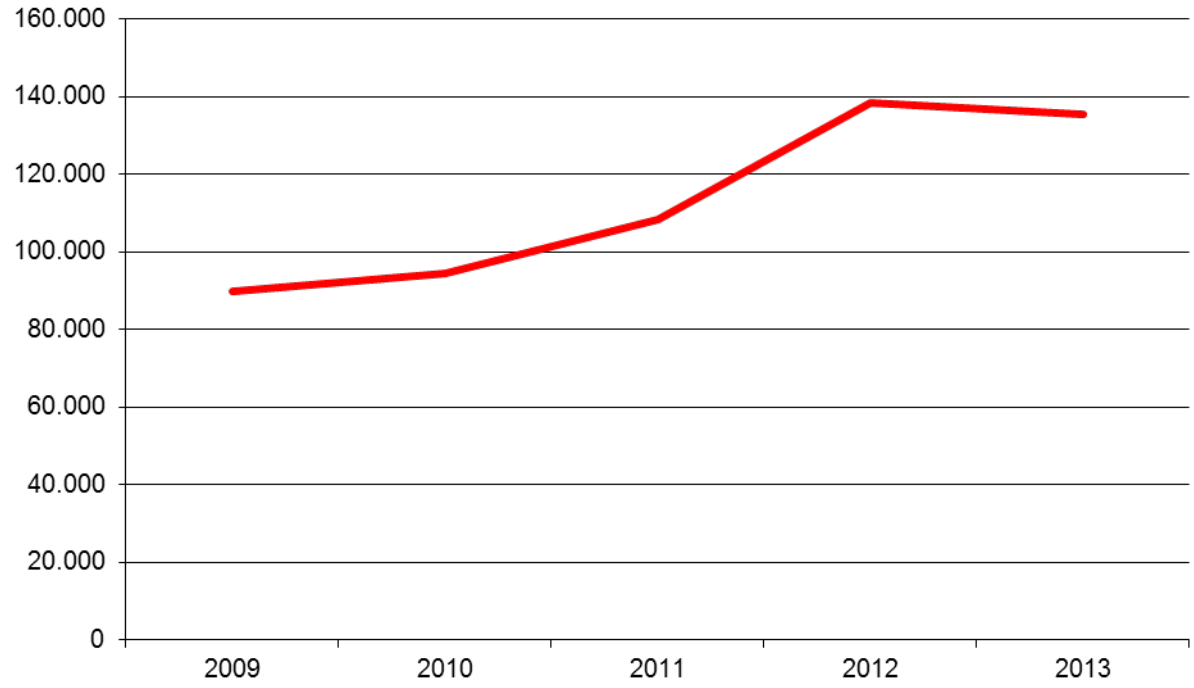
Source: Tourism Flanders based on GDS

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

	2009	2010	2011	2012*	2013*	09-13
Coast	2.461	1.445	1.244	1.255	1.301	-47,1%
Art cities	127.426	130.702	154.015	187.946	187.260	+47,0%
Antwerp	14.334	13.291	14.725	13.693	13.435	-6,3%
Bruges	15.482	14.958	21.240	25.905	27.678	+78,8%
Brussels	89.865	94.472	108.340	138.459	135.510	+50,8%
Ghent	4.268	3.697	4.162	4.074	4.581	+7,3%
Leuven	3.128	3.875	5.189	5.327	5.529	+76,8%
Mechelen	349	409	359	488	527	+51,0%
Flemish countryside	15.744	18.475	16.424	19.599	20.133	+27,9%
Flanders	145.631	150.622	171.683	208.800	208.694	+43,3%

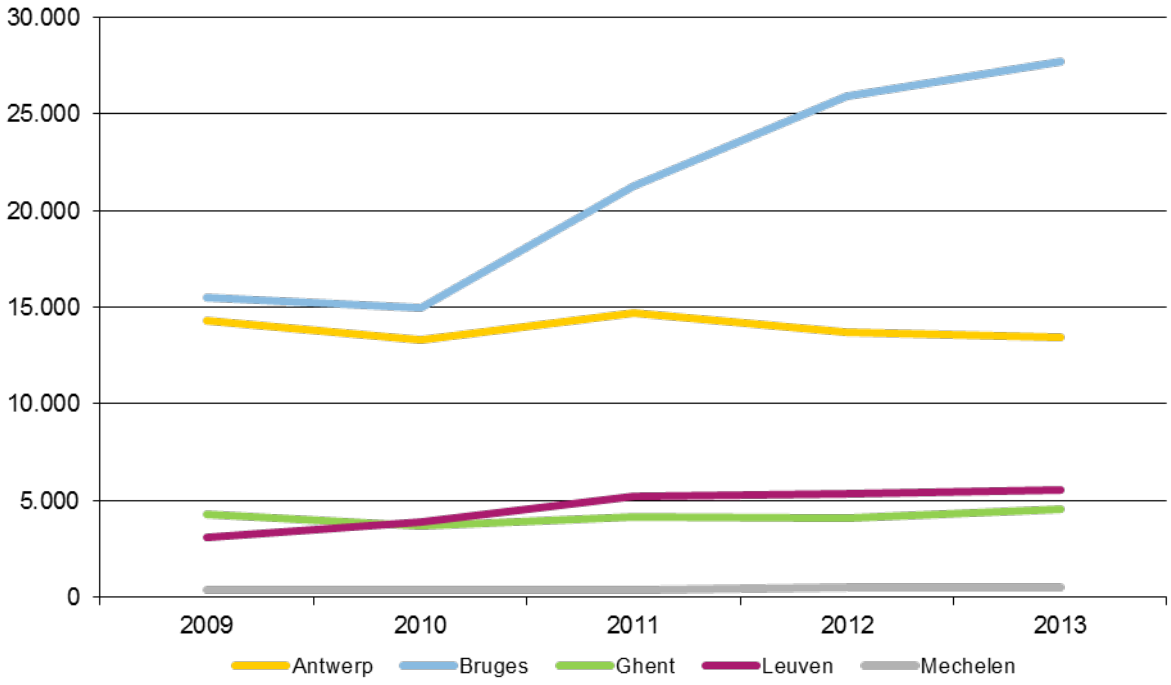
Source: Tourism Flanders based on GDS **B&Bs included*

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



Source: Tourism Flanders based on GDS

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



Source: Tourism Flanders based on GDS

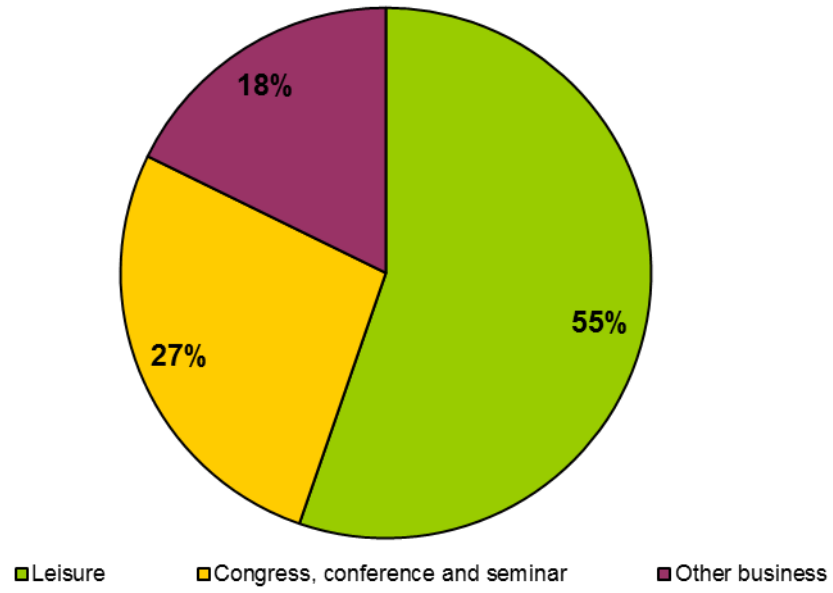
4. Motive of stay

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

	Leisure		Congress, conference and seminar		Other business		Total	
Coast	564	43%	698	54%	39	3%	1.301	100%
Art cities	105.011	56%	49.197	26%	33.052	18%	187.260	100%
Antwerp	5.920	44%	5.712	43%	1.803	13%	13.435	100%
Bruges	23.723	86%	3.310	12%	645	2%	27.678	100%
Brussels	71.874	53%	37.159	27%	26.477	20%	135.510	100%
Ghent	2.244	49%	1.305	28%	1.032	23%	4.581	100%
Leuven	1.119	20%	1.500	27%	2.910	53%	5.529	100%
Mechelen	131	25%	211	40%	185	35%	527	100%
Flemish countryside	9.804	49%	6.373	32%	3.956	20%	20.133	100%
Flanders	**115.379**	**55%**	**56.268**	**27%**	**37.047**	**18%**	**208.694**	**100%**

Source: Tourism Flanders based on GDS

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



Source: Tourism Flanders based on GDS

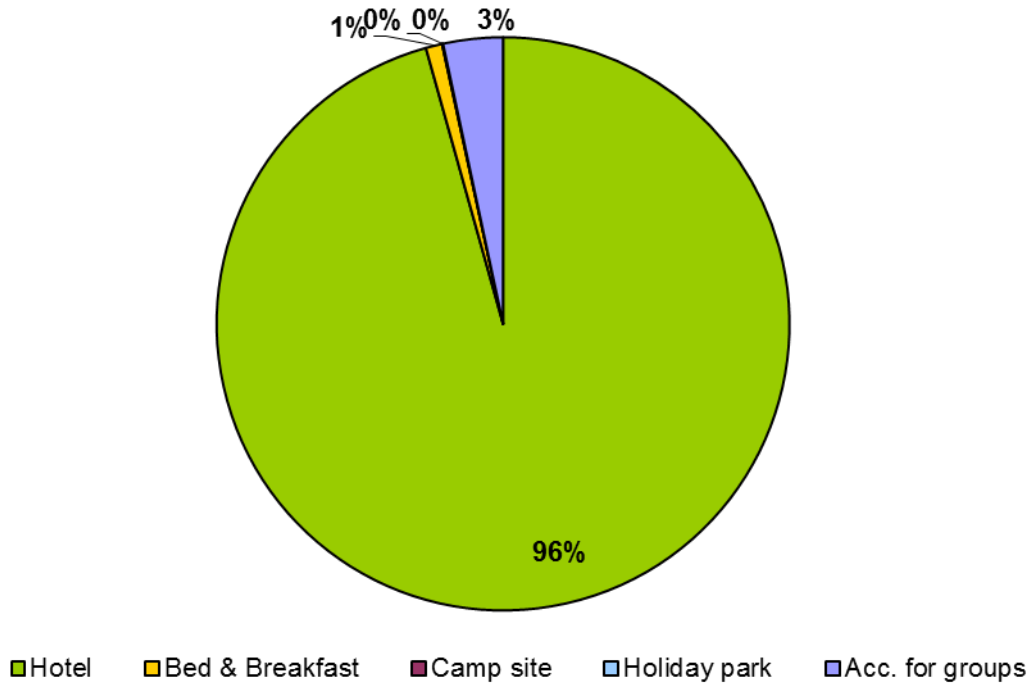
5. Type of accommodation

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

	Coast	%	Art cities	%	Flemish countryside	%	Flanders	%
Hotel	1.194	92%	179.127	96%	19.304	96%	199.625	96%
Bed & Breakfast	27	2%	1.304	1%	603	3%	1.934	1%
Camp site	4	0%	30	0%	3	0%	37	0%
Holiday park	58	4%	0	0%	12	0%	70	0%
Acc. for groups	18	1%	6.799	4%	211	1%	7.028	3%
Total	**1.301**	**100%**	**187.260**	**100%**	**20.133**	**100%**	**208.694**	**100%**

Source: Tourism Flanders based on GDS

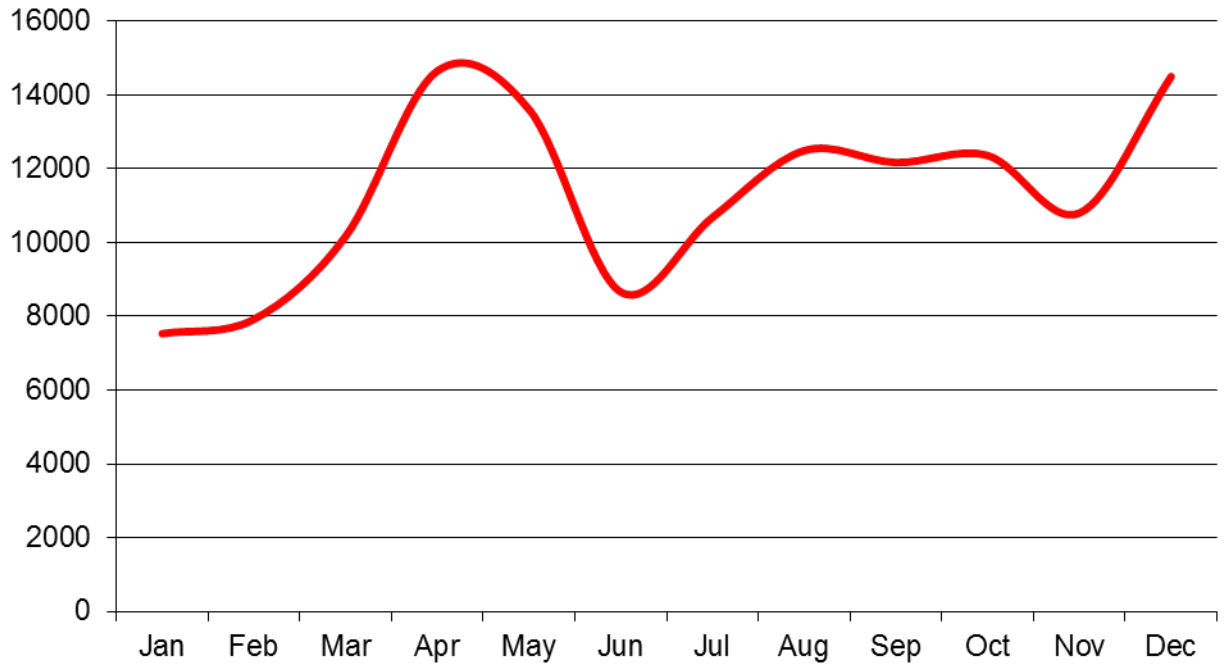
Figure 12: The Japanese market in Flanders by type of accommodation 2013 (overnights)



Source: Tourism Flanders based on GDS

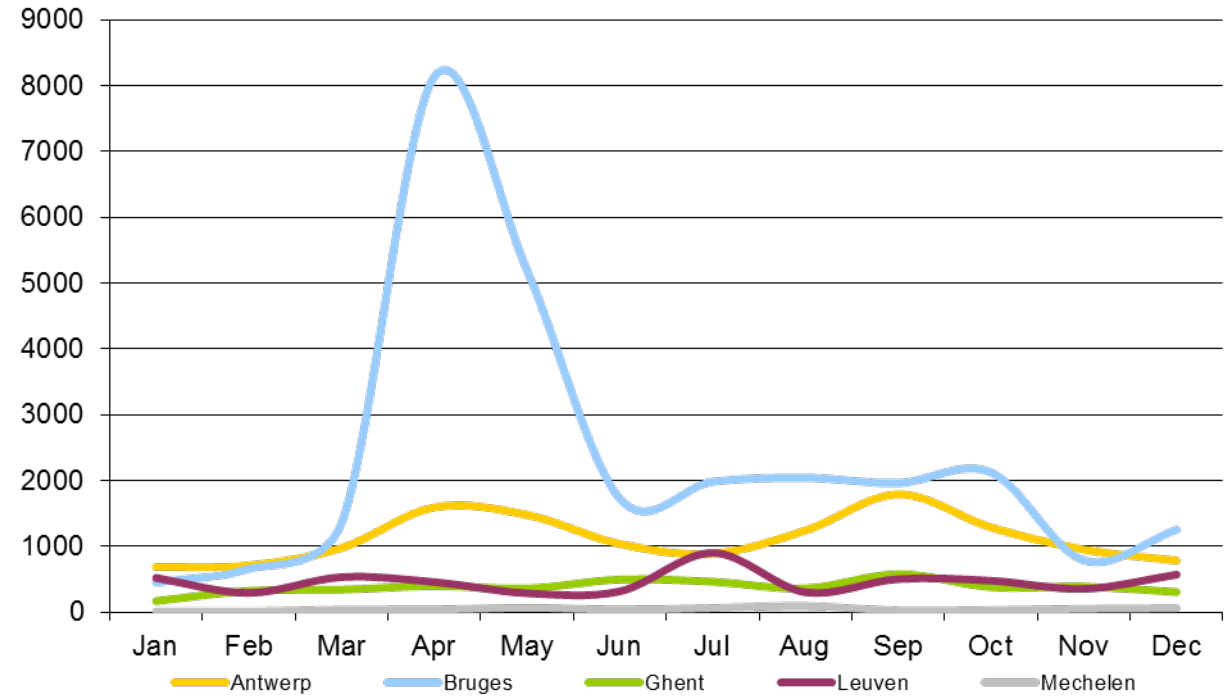
6. Seasonality

Figure 13: Japanese overnights in Brussels – seasonality 2013



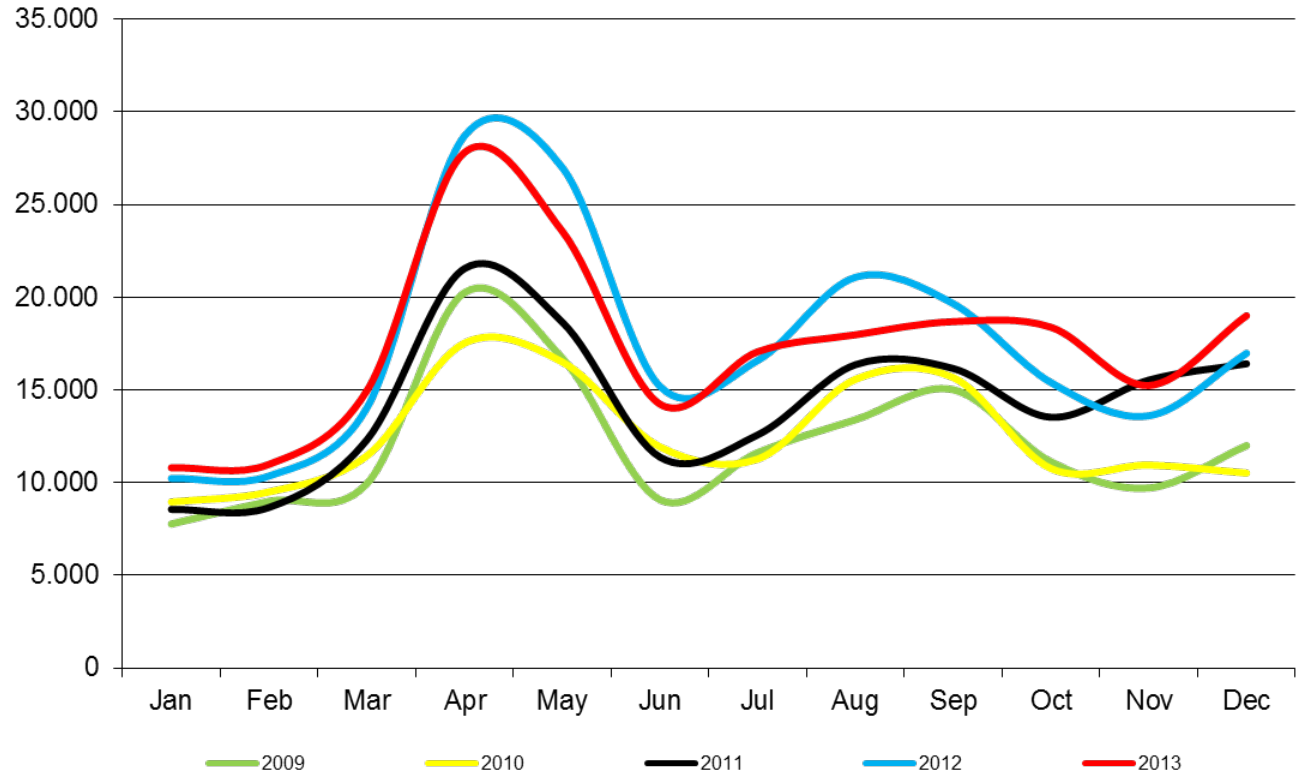
Source: Tourism Flanders based on GDS

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



Source: Tourism Flanders based on GDS

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



Source: Tourism Flanders based on GDS

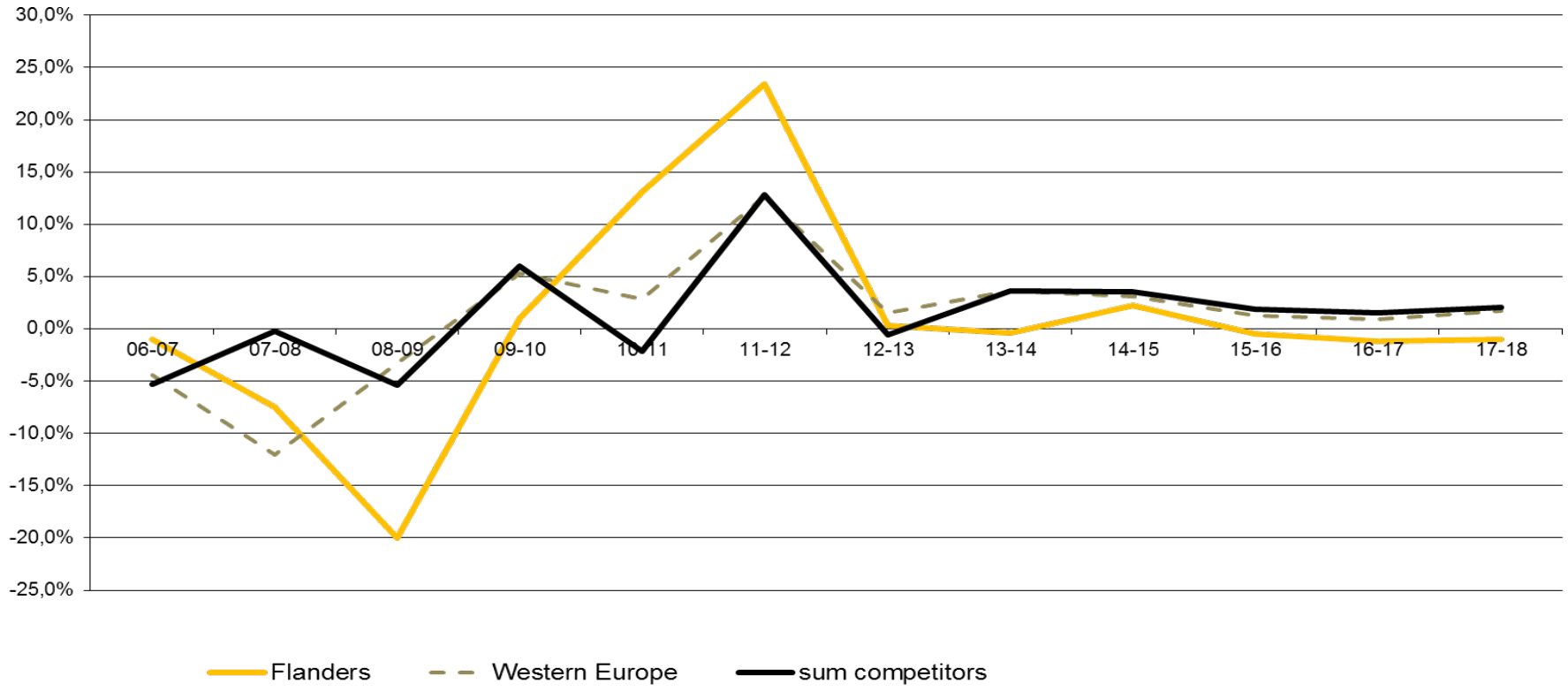
7. Country benchmark

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

destination	2009	2010	2011	2012	2013	*2018*	*2009-2013*	*2013-2018*
Flanders	76	77	87	108	108	*107*	***+41,3%***	***-0,9%***
Western Europe	2.983	3.140	3.230	3.638	3.692	*4.100*	***+23,8%***	***+11,0%***
sum competitors	810	859	840	948	942	*1.066*	***+16,8%***	***+13,2%***
Netherlands	121	146	137	157	168	*173*	***+39,8%***	***+2,8%***
Austria	199	214	229	261	259	*302*	***+30,4%***	***+16,6%***
Czech Republic	168	181	163	170	163	*162*	***-3.0%***	***-0,9%***
Portugal	58	62	58	65	72	*88*	***+24,5%***	***+22,2%***
Finland	102	109	121	140	125	*113*	***+22,5%***	***-9,1%***
Croatia	163	147	132	155	155	*228*	***-5,1%***	***+47,1%***

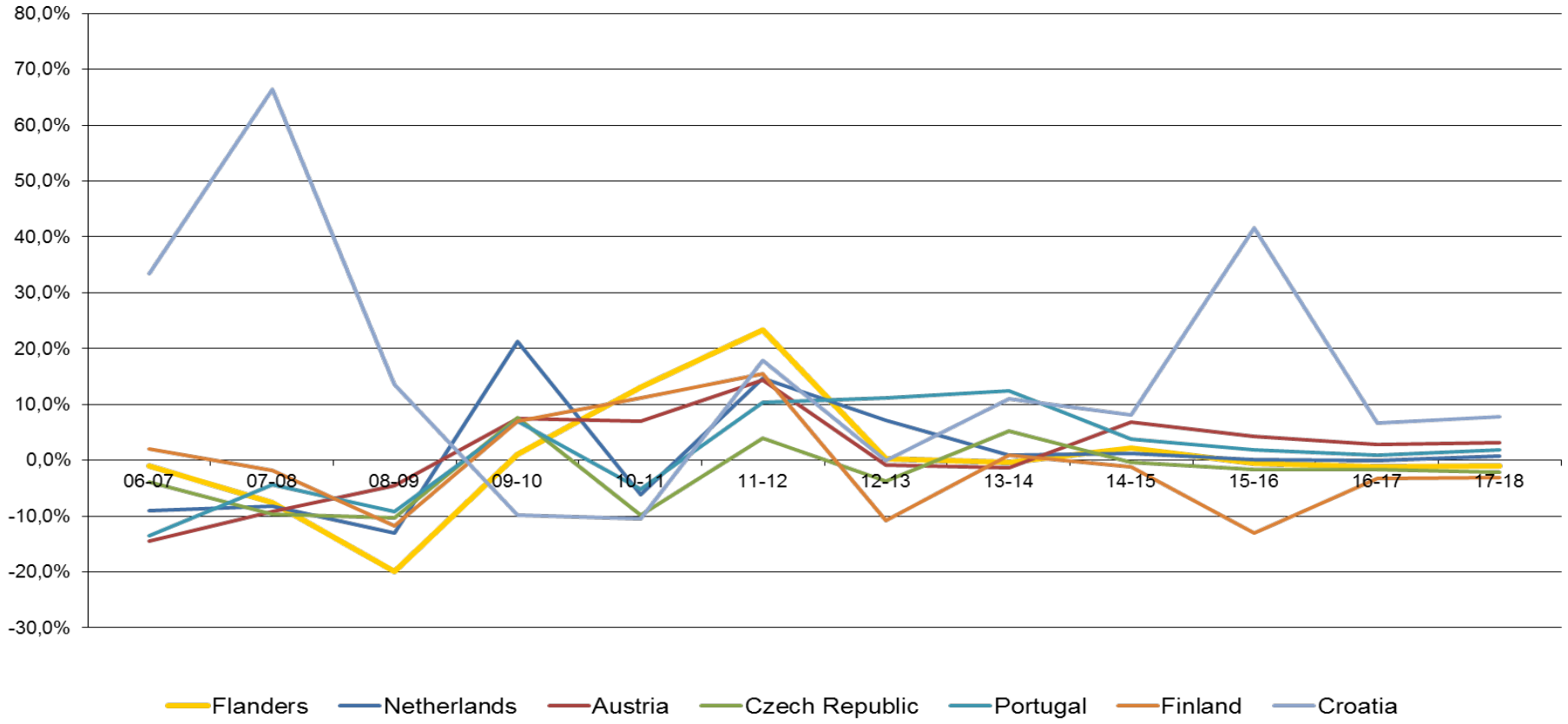
Source: Tourism Flanders based on TDM and GDS

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



Source: Tourism Flanders based on TDM and GDS

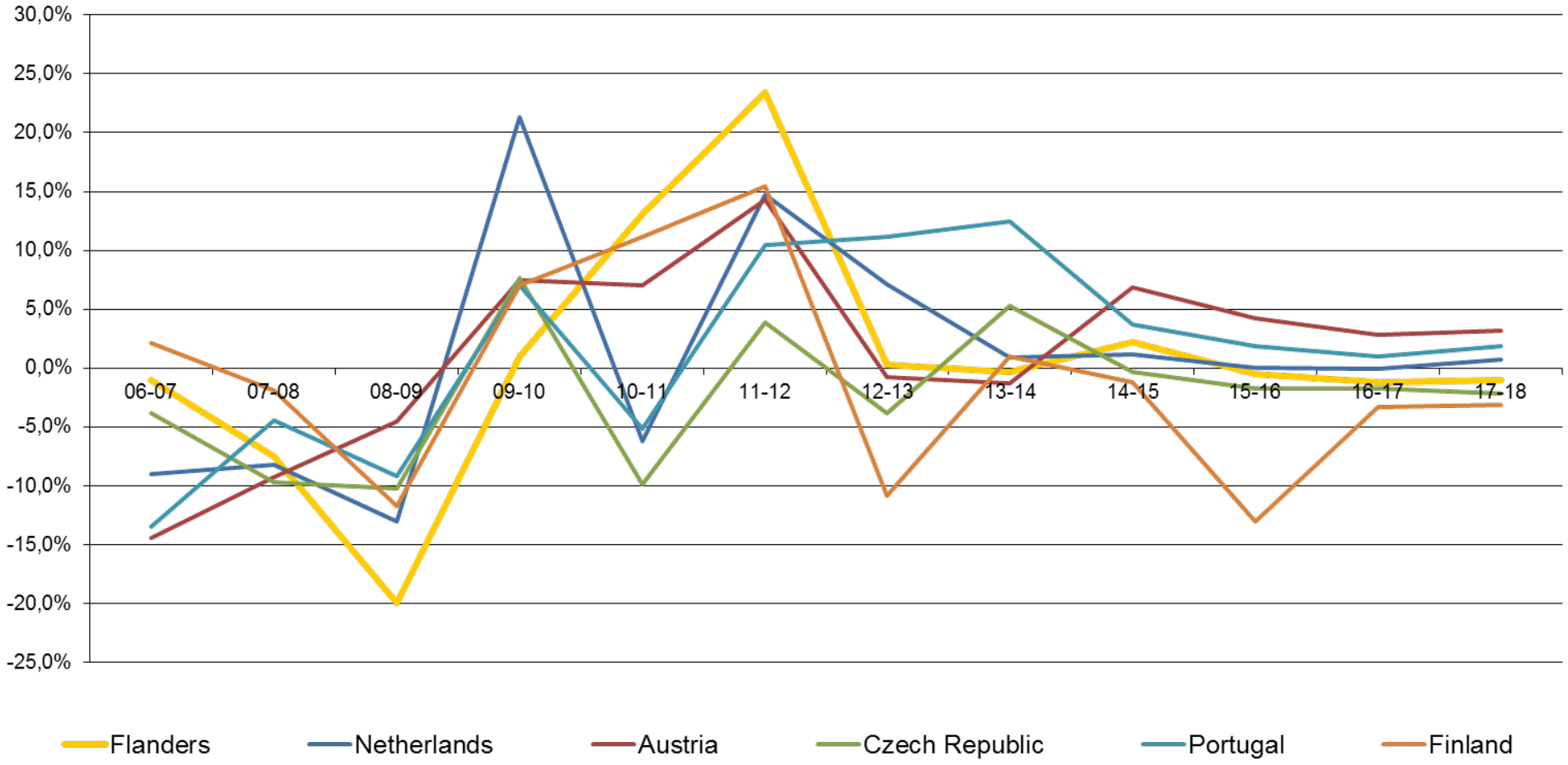
Figure 17: Trend and forecast of the Japanese market in Flanders and competitive destinations (2007-2018, in arrivals)



Source: Tourism Flanders based on TDM and GDS

Figure 18: Trend and forecast of the Japanese market in Flanders and competitive destinations

(2007-2018, in arrivals, excluding Croatia)



Source: Tourism Flanders based on TDM and GDS

C. PROFILE OF THE JAPANESE 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 Japanese 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.

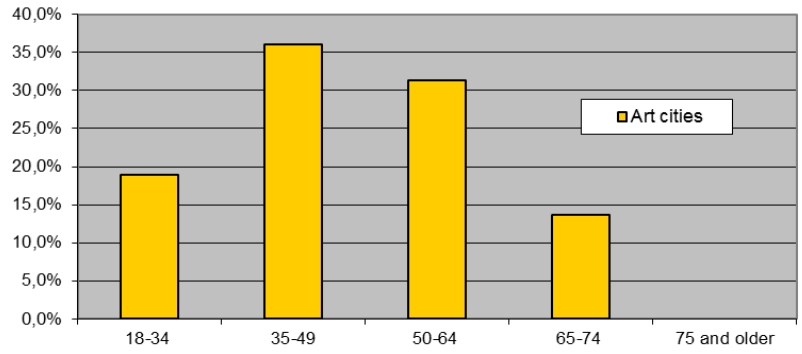
In 2011, the Japanese tourist accounted for 172,000 overnight stays in Flanders, of which 99,000 were overnight leisure stays. In the last decade the Japanese market has seen a considerable decline. But in 2011 there was a break in the downward trend and the figures began to rise again. 90% of Japanese overnight stays are in the art cities.

The overwhelming majority of Japanese tourists in the art cities, being 70%, are from in and around Tokyo. The Osaka region accounts for 11% and the Nagoya region for 9%.

1. Profile

The Japanese respondent in the art cities is 48 years old on average. The Japanese tourists who visit the arts cities belong mostly to the middle-aged categories. It is however the case that, compared to the other age categories, the older 65-75 group is the best represented. On the other hand, Japanese tourists of 75 and over do not visit the art cities.

Figure 19: Age of the surveyed Japanese overnight leisure tourist in the art cities



More than half (53%) of Japanese tourists in the art cities live in a family in which the head of the family is an executive or entrepreneur or practises a liberal profession. For no other nationality is this share so large. One quarter of the family heads are white collar employees. The self-employed are present in strikingly low numbers.

Just about all the heads of the family have been educated beyond secondary level. As many as 70% have a university degree.

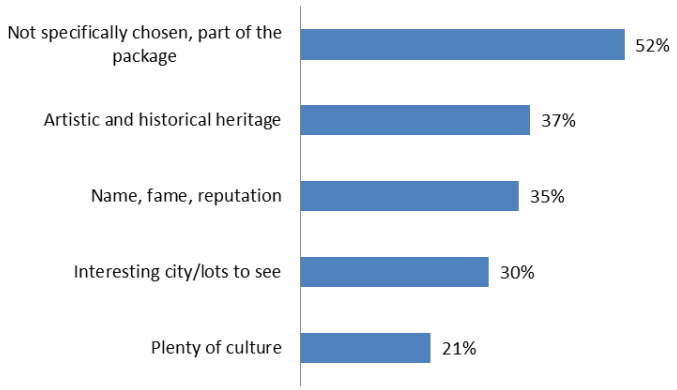
Table 12: Profession and educational level of the family head of the Japanese overnight leisure tourist in the art cities

Profession of head of family	Art cities
Blue collar worker	1%
White collar employee	25%
Executive, entrepreneur, liberal profession	53%
Self-employed	6%
Retired early	15%
Other	0%
Total	**100%**
Educational level of head of family	
Primary or lower secondary education	0%
Higher secondary education	3%
Higher non-university education	27%
University education	70%
Total	**100%**

2. Competitive position and motivation

None of the Japanese tourists had considered another destination. This is the case for no other nationality. Japanese tourists give an average of 2.2 reasons for coming to the art cities, the least number of reasons among all the markets. Strikingly, more than half of them visit our art cities because it is included in the travel package. Artistic and historical heritage is the second most frequently cited reason. The reputation of the cities comes in third place. Places of interest are also important.

Figure 20: Top 5 reasons for Japanese tourists visiting the art cities



3. Characteristics of the trip

Almost all the Japanese travel groups came without children. The average size of the group is 2.1 people. 1.9 people, on average, come from the same family. Japanese tourists have the largest group of solo travellers, 15% travel alone.

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

	Art cities
Family/group with children	5%
Family/group without children	95%
Total	**100%**
Average family size	1.9
Average group size	2.1

Japanese tourists come to Europe by aircraft, of course. Due to the lack of a direct connection and the large number of organised European group tours, many come here via other countries. The greatest part of these Japanese tourists (43%) arrives via Schiphol. A long way behind come Paris and Düsseldorf. Only then comes Zaventem. The tourists that arrive in Zaventem had at least one stopover at another airport.

Table 14: Airport at which the Japanese overnight leisure tourist in the art cities arrives in Europe

	Art cities
Brussels Airport - Zaventem	10%
Amsterdam Airport - Schiphol	43%
Frankfurt Airport	4%
Düsseldorf - International	13%
Paris - Orly/Charles de Gaulle	17%
London - Heathrow/Gatwick/Stansted	7%
Other airport	4%
Total	**100%**

All the Japanese tourists had booked their accommodation in advance. Only 3% had booked their stay directly with the owner of the accommodation. The others, i.e. almost everyone, relied on an agent. 77% used a traditional travel agent and 18% an online travel agency. For no other nationality is the travel agency so important.

Fewer than half of the Japanese tourists, a mere 44%, used the Internet for their booking. Tourists from other markets book online much more.

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

	Art cities
Not booked in advance	0%
Directly through the operator	3%
Through an agent:	97%
Booking site, online travel agent	18%
Travel agency, tour operator	77%
Other	1%
Total	**100%**

4. Information sources

Japanese tourists do not do much in the way of preparation for their trip, probably because the tours are guided in many cases. Just under half referred to some source of information.

27% did some research on the Internet, which is the main source of information. Compared to the other nationalities, this is quite a small number. A quarter of those who prepared in advance used a brochure. Other sources are of lesser importance.

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

	Art cities
No research/Past experience	52%
Research in advance	48%
Total	**100%**
Details checked in advance (overall basis):	
Online information and websites	27%
TV, radio or press	1%
Informal channels (family, friends and acquaintances)	10%
Brochures, folders, printed matter	26%
Travel guide, tourist guide	8%
Other information	0%

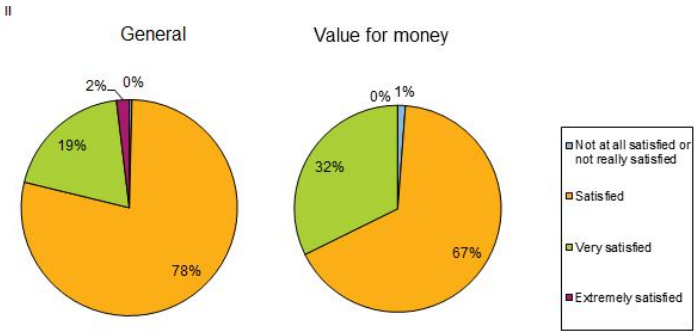
5. Activities

It is striking that Japanese tourists prefer visiting cathedrals (95%) and historical buildings (94%) to walking around the city centre (92%). In no other market does walking around the city centre not head the list. They also visit museums frequently (65%). Enjoying a beverage on a café terrace and enjoying the gastronomy are cited by a little less than half of the Japanese tourists in the art cities. For these activities, this score is low compared to the other markets. Then again, the 45% that went on a guided walk around the city is relatively high. Japanese tourists also love to go on excursions. 61% go on a day trip in Flanders, almost always to an art city. For no other market are excursions so popular.

6. Satisfaction and return visit

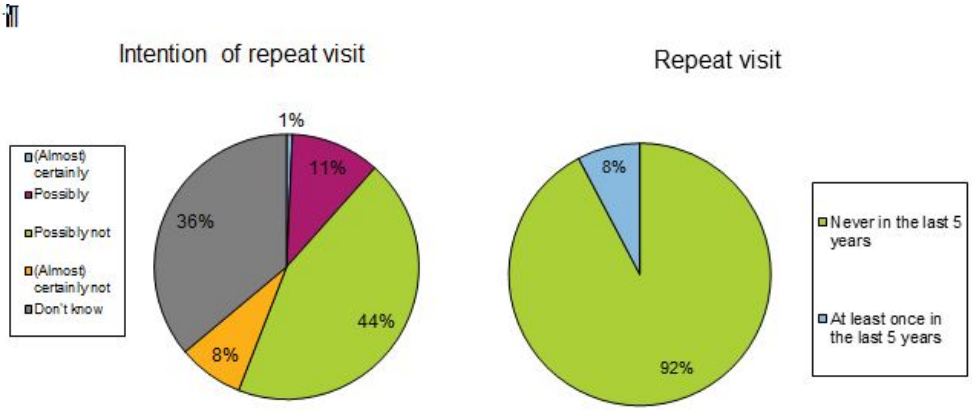
All Japanese tourists are at least satisfied with their stay in the art cities. The majority (78%) are just satisfied. This gives a score of 3.2 out of 5, a little lower than average. About a third of Japanese tourists are very satisfied with the value for money offered during their stay in the art cities. Almost all the others are satisfied. This gives an overall score of 3.3 out of 5.

Figure 21: Satisfaction, general and with value for money, of the Japanese overnight leisure tourist in the art cities



92% of the Japanese tourists have come to the art cities for the first time.
Only 12% say they will possibly or certainly return. More than half already know that they will possibly or certainly not return.

Figure 22: Actual* and intentional return visit of the Japanese overnight leisure tourist in the art cities**



*The last 5 years

** Within this and 3 years

7. Spending

On average Japanese tourists spend 135 euros per person per night in the Flemish art cities. Most of this goes on accommodation. Few other nationalities spend more on this, and only a few nationalities spend more on accommodation than on meals, food and drinks. Japanese tourists spend 38 euros on meals, food and drinks. On shopping they spend 26 euros.

Table 17: Average spend of the Japanese overnight leisure tourist in the art cities

Spend, per person per night (euros)	Art cities
Accommodation	55
Meals, food and drinks	38
Attractions and entertainment	15
Travel	0
Shopping	26
Other spending	0
Total	**135**

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&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.

E. LIST OF FIGURES AND TABLES

Figure 1: Trend of the Japanese economy 2009-2013 5
Figure 2 Japanese Outbound Travel 2009-2013 (spending, USD) 6
Figure 3: The Japanese market in Flanders by region 2013 (arrivals (left) and overnights (right)) 7
Figure 4: Japanese overnights in Flanders 2013 8
Figure 3: Japanese overnights in the Art cities 2013 9
Figure 6: Trend of Japanese overnights in Flanders 2004-2013 10
Figure 7: Trend of Japanese arrivals in Flanders 2004-2013 11
Figure 8: Trend of the average length of stay of Japanese in Flanders 2004-2013 11
Figure 9: Trend of Japanese overnights in Brussels 2009-2013 12
Figure 10: Trend of Japanese overnights in Antwerp, Bruges, Ghent, Leuven, Mechelen 2009-2013 13
Figure 11: The Japanese market in Flanders by motive of stay 2013 (overnights) 14
Figure 12: The Japanese market in Flanders by type of accommodation 2013 (overnights) 15
Figure 13: Japanese overnights in Brussels – seasonality 2013 16
Figure 14: Japanese overnights in Antwerp, Bruges, Ghent, Leuven, Mechelen – seasonality 2013 16
Figure 15: Trend Japanese overnights in Flanders – seasonality 2009-2013 17
Figure 16: Trend and forecast of the Japanese market in Flanders, Western Europe and competitive destinations (2007-2018, in arrivals) 19
Figure 17: Trend and forecast of the Japanese market in Flanders and competitive destinations (2007-2018, in arrivals) 20
Figure 18: Trend and forecast of the Japanese market in Flanders and competitive destinations (2007-2018, in arrivals, excluding Croatia) 21
Figure 19: Age of the surveyed Japanese overnight leisure tourist in the art cities 23
Figure 20: Top 5 reasons for Japanese tourists visiting the art cities 24
Figure 21: Satisfaction, general and with value for money, of the Japanese overnight leisure tourist in the art cities 27
Figure 22: Actual* and intentional** return visit of the Japanese overnight leisure tourist in the art cities 27

Table 1: Trend of the Japanese economy 2009-2013 5
Table 2: Trend of the Japanese population 2009-2013 6
Table 3: Total foreign and Japanese market in Flanders 2013 7
Table 4: The Japanese market in Flanders by region 2013 7
Table 5: The Japanese market in Flanders by destination 2013 8
Table 4: The Japanese market in the Art cities 2013 8
Table 7: Trend of Japanese overnights, arrivals and average length of stay in Flanders 2004-2013 10
Table 8: Trend of Japanese overnights in Flanders 2009-2013 12
Table 9: The Japanese market in Flanders by motive of stay 2013 (overnights) 14
Table 10: The Japanese market in Flanders by type of accommodation 2013 (overnights) 15
Table 11: Trend and forecast of the Japanese market in Flanders and competitive destinations (2009-2018, x1.000, in arrivals) 18
Table 12: Profession and educational level of the family head of the Japanese overnight leisure tourist in the art cities 24
Table 13: Travel group of Japanese overnight leisure tourist in the art cities 25
Table 14: Airport at which the Japanese overnight leisure tourist in the art cities arrives in Europe 25
Table 15: Booking of accommodation by the Japanese overnight leisure tourist in the art cities 25
Table 16: Information sources used by the Japanese overnight leisure tourist in the art cities 26
Table 17: Average spend of the Japanese overnight leisure tourist in the art cities 28