Flanders
State of the Art

Tourism in Figures

2013

the Australian market in Flanders

VISITFLANDERS

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Flanders
State of the Art

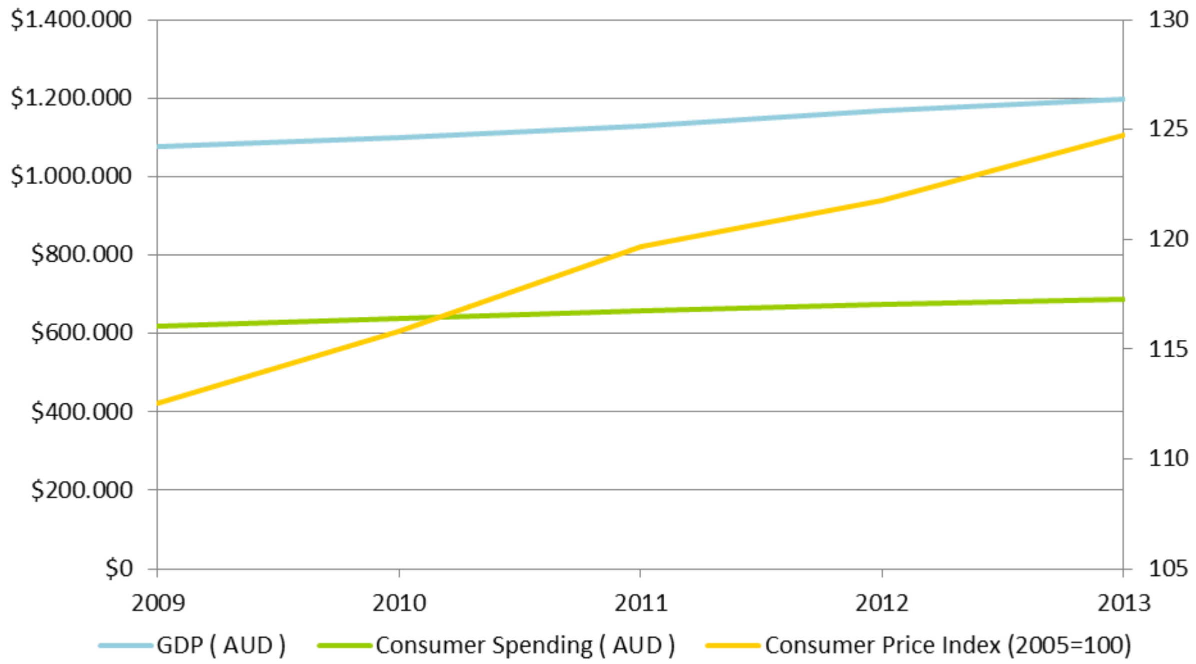
A. ECONOMIC INDICATORS

Table 1: Trend of Australian economy 2009-2013

	2009	2010	2011	2012	2013	09-13
GDP, real (x1000 000 AUD)	1.076.060	1.100.350	1.128.710	1.169.120	1.197.600	11,3%
Consumer spending (x1000 000 AUD)	617.232	637.070	656.546	672.963	686.411	11,2%
Consumer Price Index	112,5	115,8	119,6	121,8	124,7	12,2%

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

Figure 1: Trend of the Australian economy 2009-2013



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

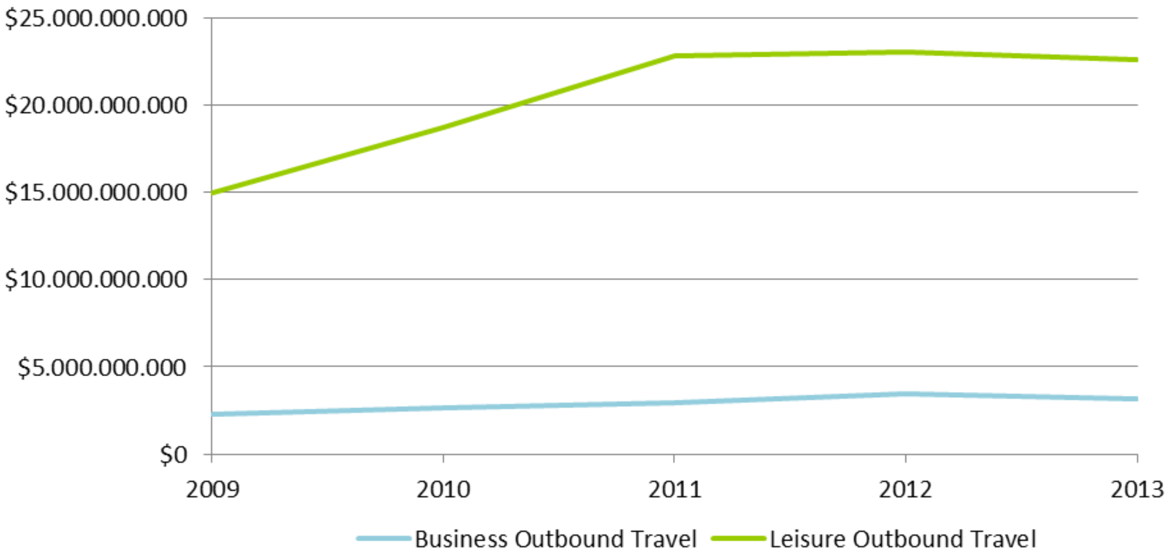
Table 2: Trend of the Australian population 2009-2013

	2009	2010	2011	2012	2013	09-13
Population	21.319.300	21.539.700	21.760.400	21.980.300	22.199.300	4,1%
Population, 65+	13,7%	13,9%	14,2%	14,6%	15,0%	1,3%
Unemployment rate	5,6%	5,2%	5,1%	5,2%	5,7%	0,1%

** in percentage point*

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

Figure 2: Australian outbound travel 2009-2013 (spending, USD)



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

B. THE AUSTRALIAN MARKET IN FLANDERS

1. Key figures

Table 3: Total foreign and Australian market in Flanders 2013

	Overall total foreign travellers	Australian travellers	% Australia	Ranking Australia market
arrivals	6.488.545	45.555	0,7%	19th
overnight stays	13.742.727	100.516	0,7%	19th
length of stay (nights)	2,1	2,2	-	-

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

! this is excluding Australian overnights in rental accommodations at the coast. They are not included in the regular statistics of the commercial accommodations in Flanders.

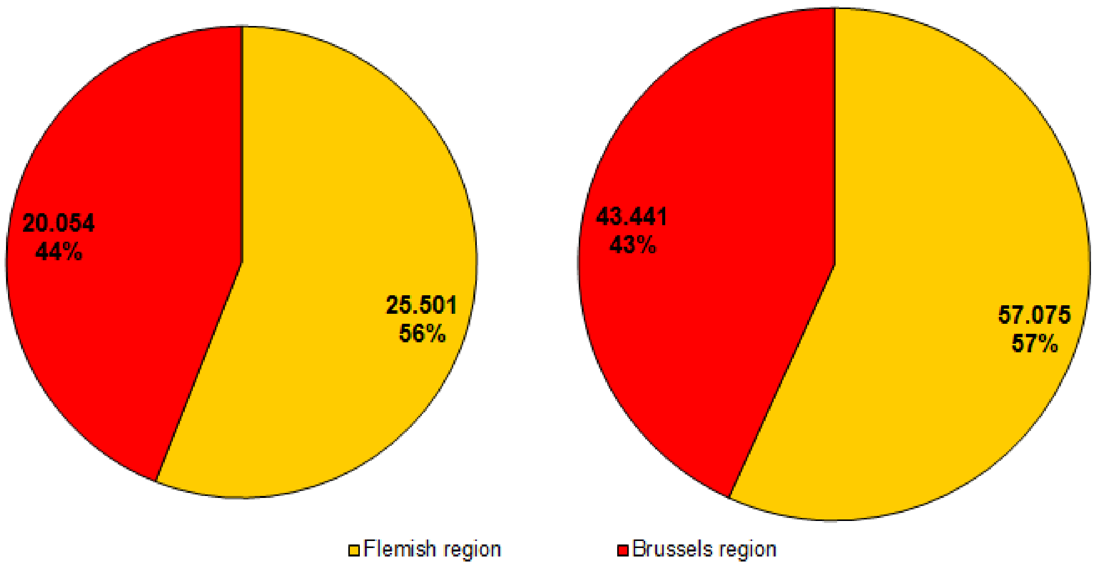
2. Distribution within Flanders

Table 4: The Australian market in Flanders by region 2013

	arrivals	%	overnights	%
Flemish region	25.501	56%	57.075	57%
Brussels region	20.054	44%	43.441	43%
Flanders	**45.555**	**100%**	**100.516**	**100%**

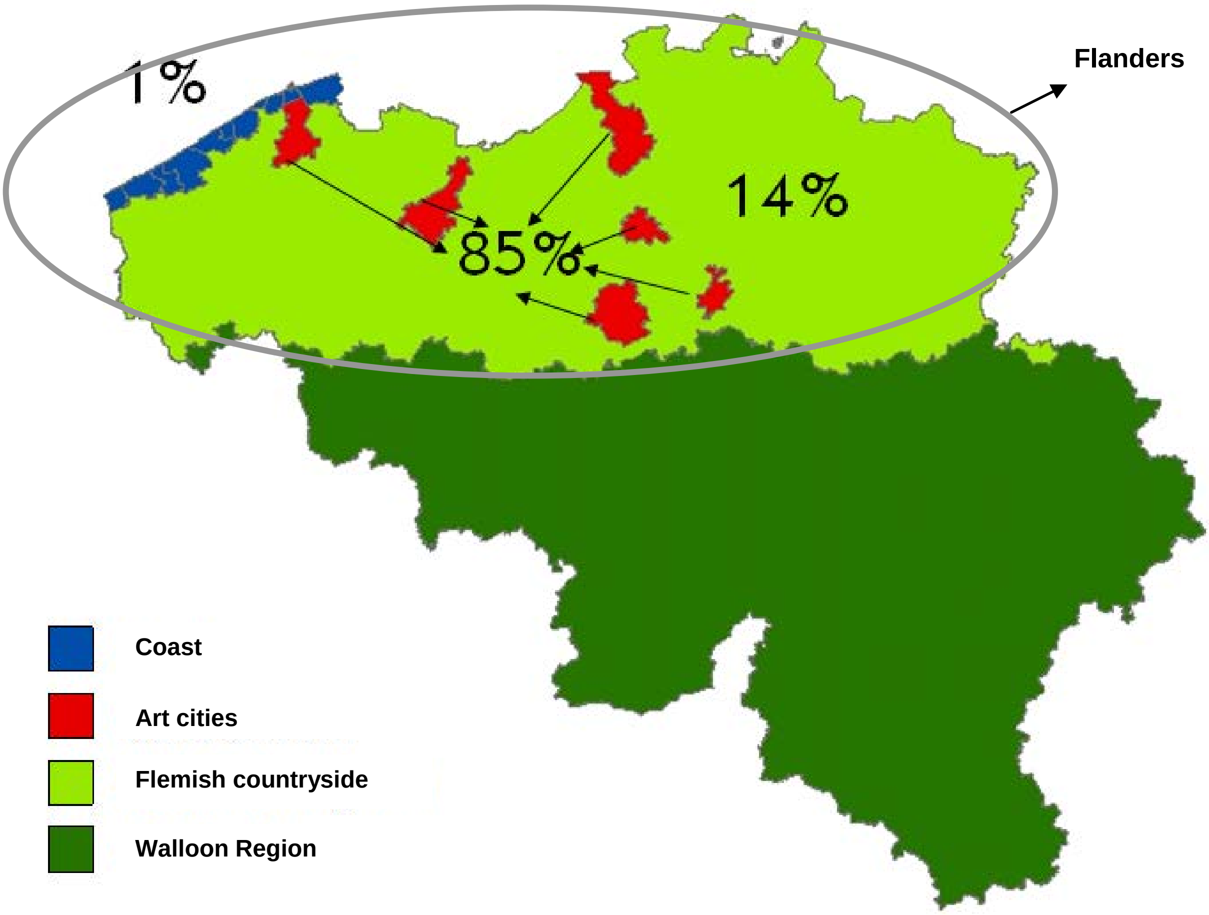
*Source: VISIT**FLANDERS** based on GDS*

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



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

Figure 4: Australian overnights in Flanders 2013



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

Table 5: The Australian market in Flanders by destination 2013

	overnights	%
Coast	1.269	1%
Art Cities	85.369	85%
Flemish countryside	13.878	14%
Flanders	**100.516**	**100%**

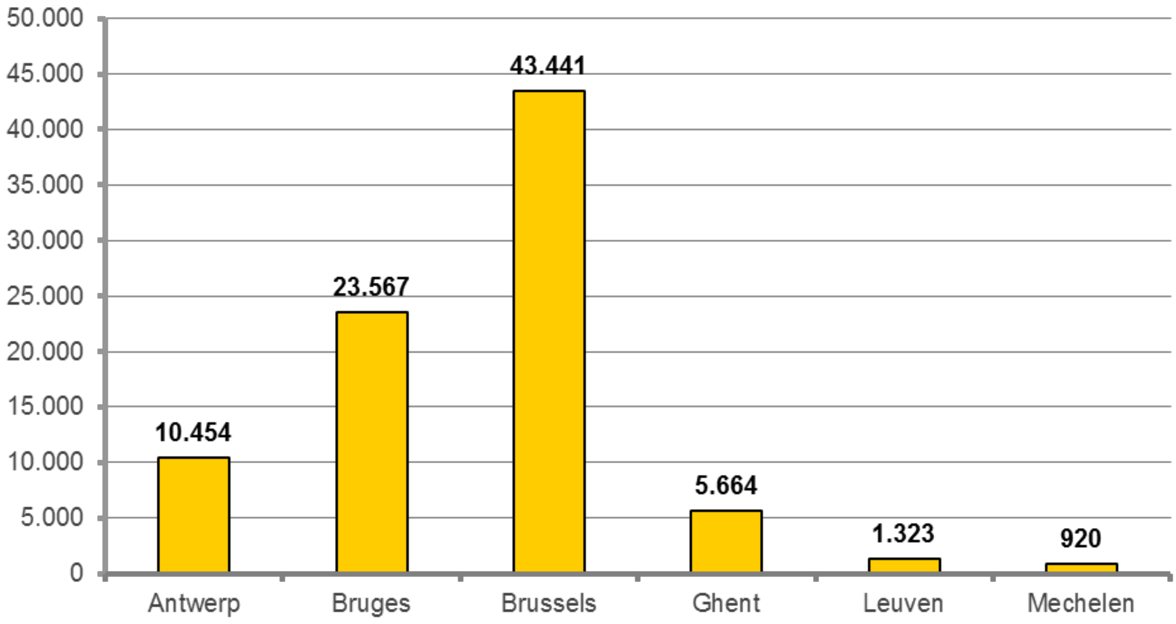
*Source: VISIT**FLANDERS** based on GDS*

Table 6: The Australian market in the Art cities 2013

	overnights	%
Antwerp	10.454	12%
Bruges	23.567	28%
Brussels	43.441	51%
Ghent	5.664	7%
Leuven	1.323	2%
Mechelen	920	1%
Art Cities	**85.369**	**100%**

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

Figure 5: Australian overnights in the Art cities 2013



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

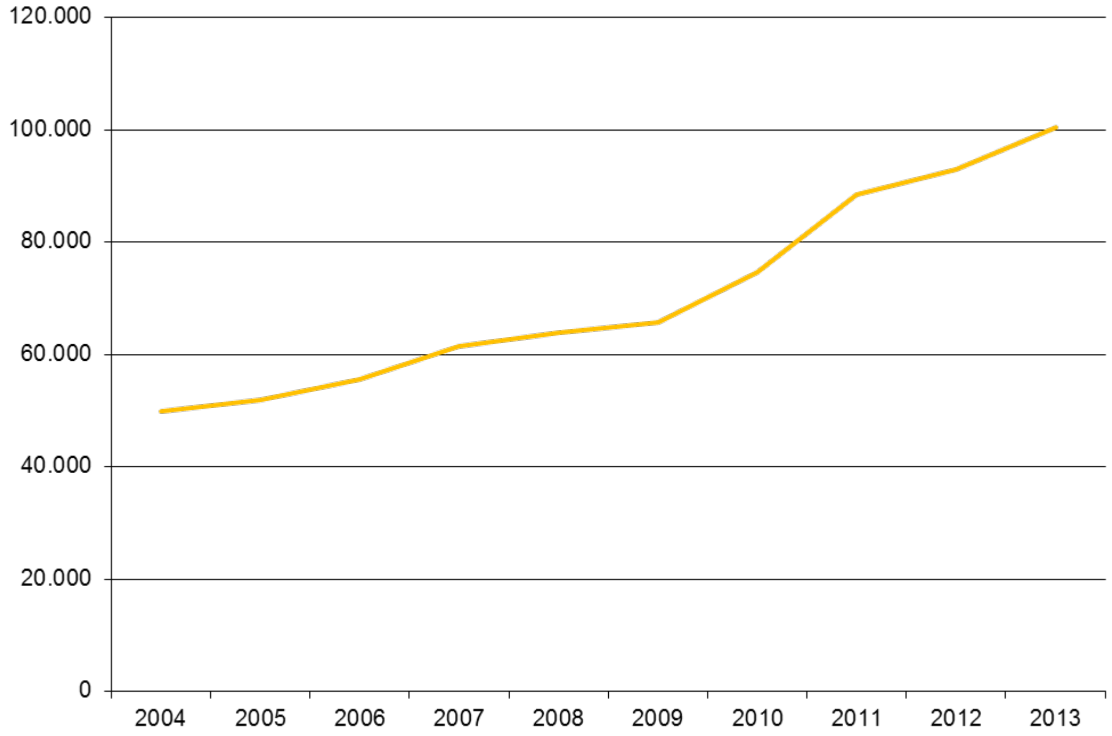
3. Trends

Table 7: Trend of Australian 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)	50	52	56	61	64	66	75	88	93	101	+121,1%
Arrivals (x1.000)	27	29	31	33	35	35	38	43	43	46	+74,1%
Average length of stay**	1,85	1,78	1,79	1,84	1,83	1,88	1,98	2,08	2,14	2,21	+27,1%

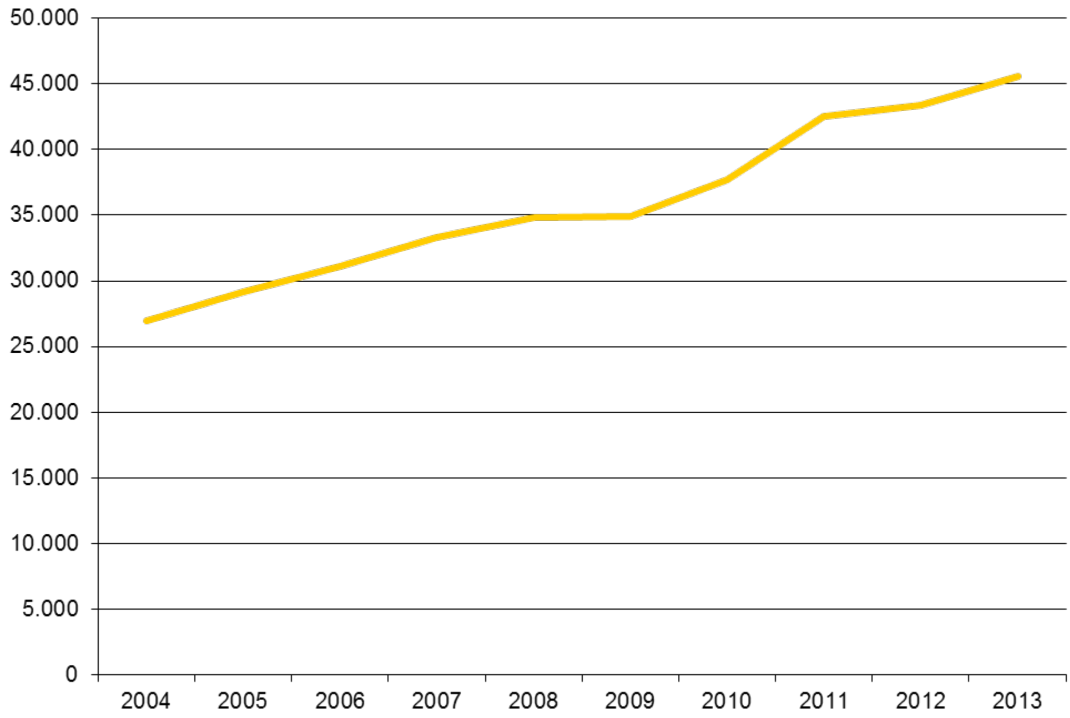
** B&B included*
*Source: VISIT**FLANDERS** based on GDS* ***nights*

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



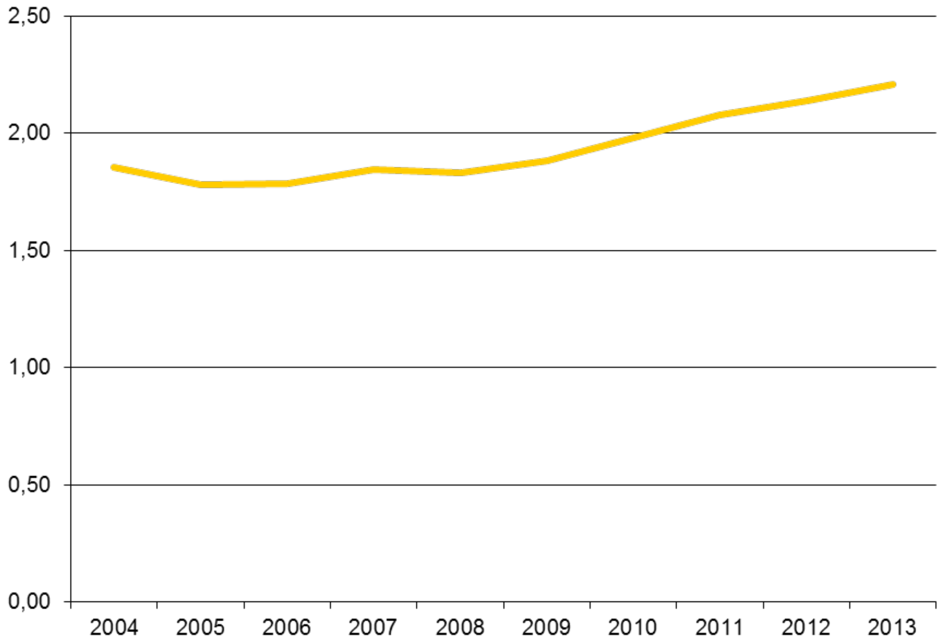
*Source: VISIT**FLANDERS** based on GDS*

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



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

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



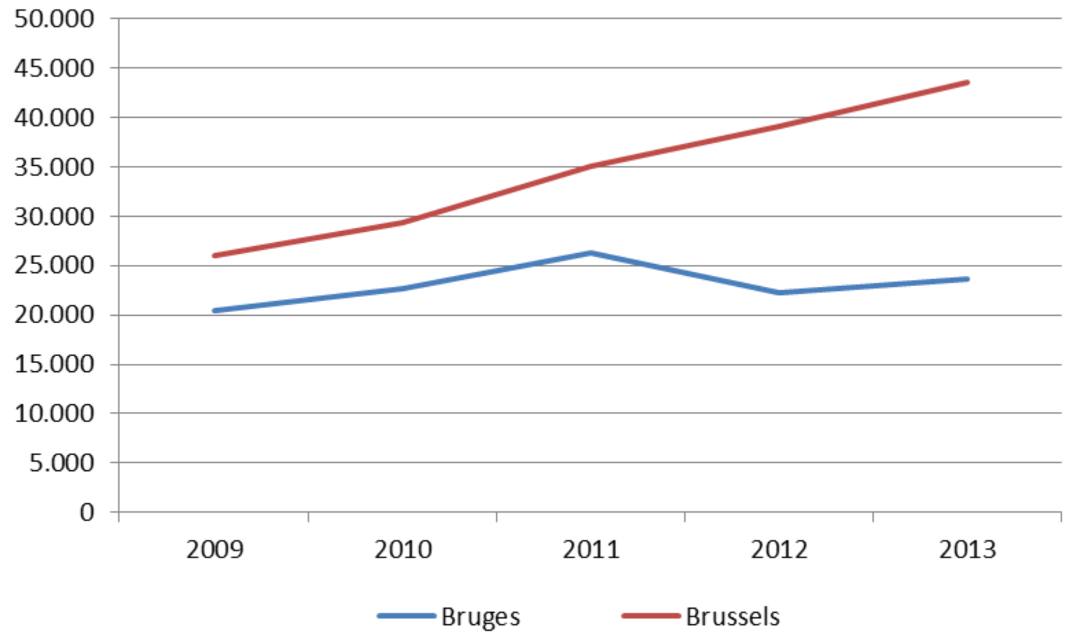
*Source: VISIT**FLANDERS** based on GDS*

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

	2009	2010	2011	2012	2013	09-13
Coast	516	1.322	919	1.039	1.269	+145,9%
Art cities	56.562	62.390	74.253	77.546	85.369	+50,9%
Antwerp	6.244	6.077	6.724	8.750	10.454	+67,4%
Bruges	20.449	22.589	26.296	22.193	23.567	+15,2%
Brussels	25.914	29.362	35.009	38.978	43.441	+67,6%
Ghent	2.167	3.280	4.747	5.688	5.664	+161,4%
Leuven	1.640	937	1.098	1.334	1.323	-19,3%
Mechelen	148	145	379	603	920	+521,6%
Flemish countryside	8.577	10.871	13.219	14.286	13.878	+61,8%
Flanders	**65.655**	**74.583**	**88.391**	**92.871**	**100.516**	**+53,1%**

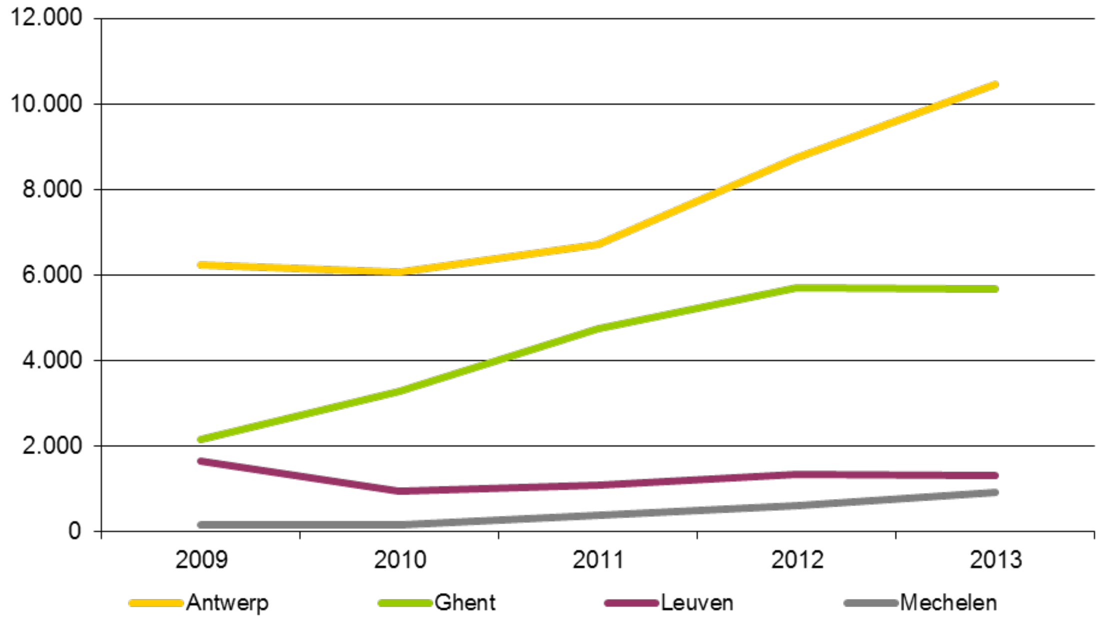
*Source: VISIT**FLANDERS** based on GDS*

Figure 9: Trend of Australian overnights in Brussels and Bruges 2009-2013



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

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



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

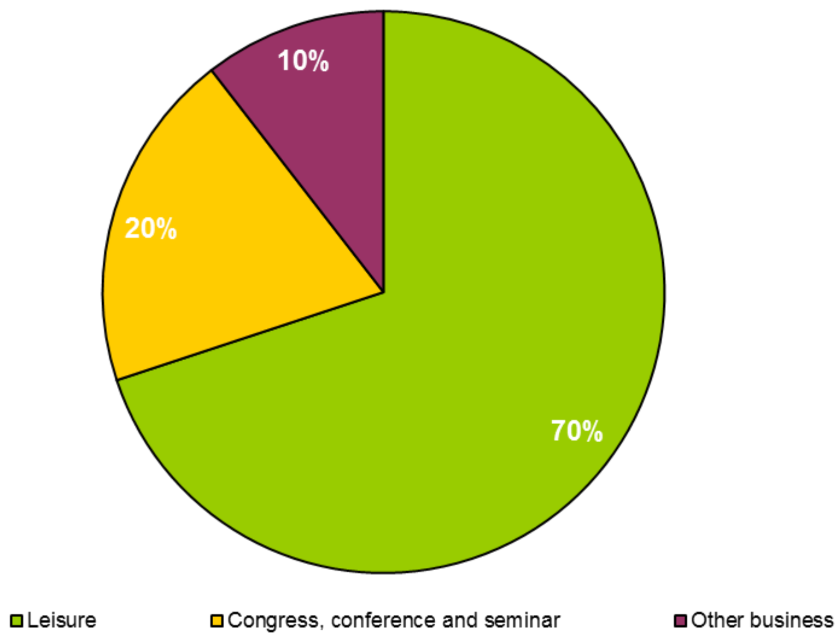
4. Motive of stay

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

	Leisure		Congress, conference and seminar		Other business		Total	
Coast	1.230	97%	11	1%	28	2%	1.269	100%
Art Cities	58.841	69%	18.084	21%	8.444	10%	85.369	100%
Flemish countryside	10.210	74%	1.594	11%	2.074	15%	13.878	100%
Flanders	**70.281**	**70%**	**19.689**	**20%**	**10.546**	**10%**	**100.516**	**100%**

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

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



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

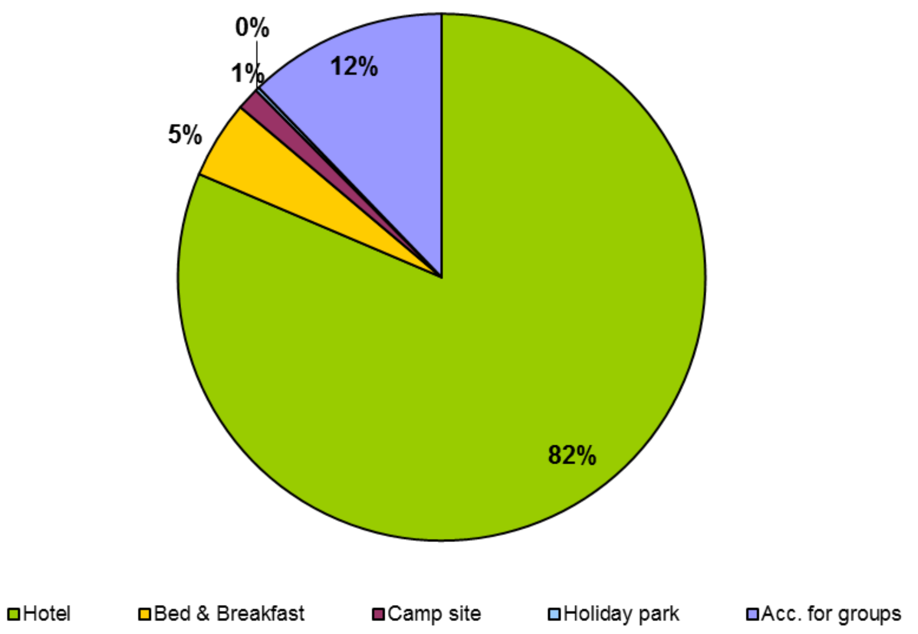
5. Type of accommodation

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

	Coast	%	Art Cities	%	Flemish countryside	%	Flanders	%
Hotel	547	43%	70.815	83%	10.468	75%	81.830	81,4%
B&B	139	11%	2.511	3%	2.140	15%	4.790	4,8%
Camp site	440	35%	487	1%	465	3%	1.392	1,4%
Holiday park	84	7%	0	0%	152	1%	236	0,2%
Acc. for groups	59	5%	11.556	14%	653	5%	12.268	12,2%
Total	**1.269**	**100%**	**85.369**	**100%**	**13.878**	**100%**	**100.516**	**100%**

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

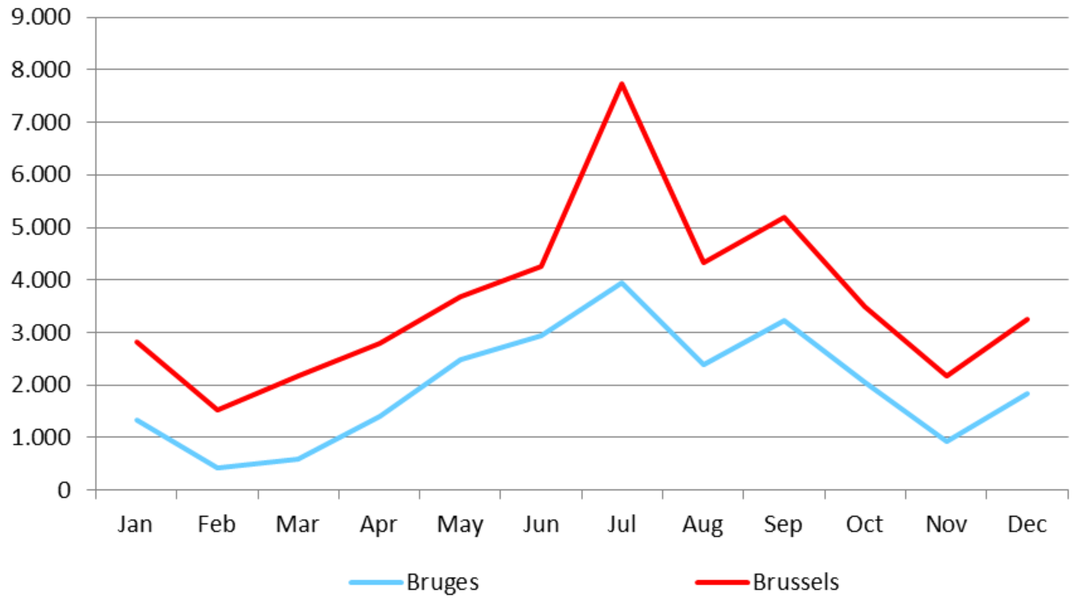
Figure 12: The Australian market in Flanders by type of accommodation of stay 2013 (overnights)



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

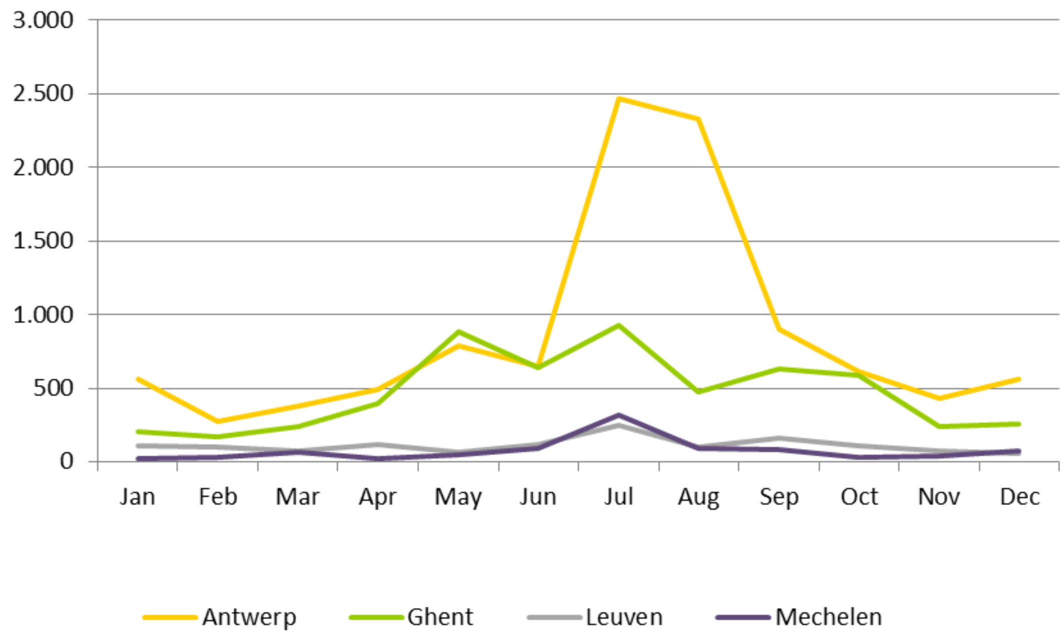
6. Seasonality

Figure 13: Australian overnights in Bruges and Brussels – seasonality 2013



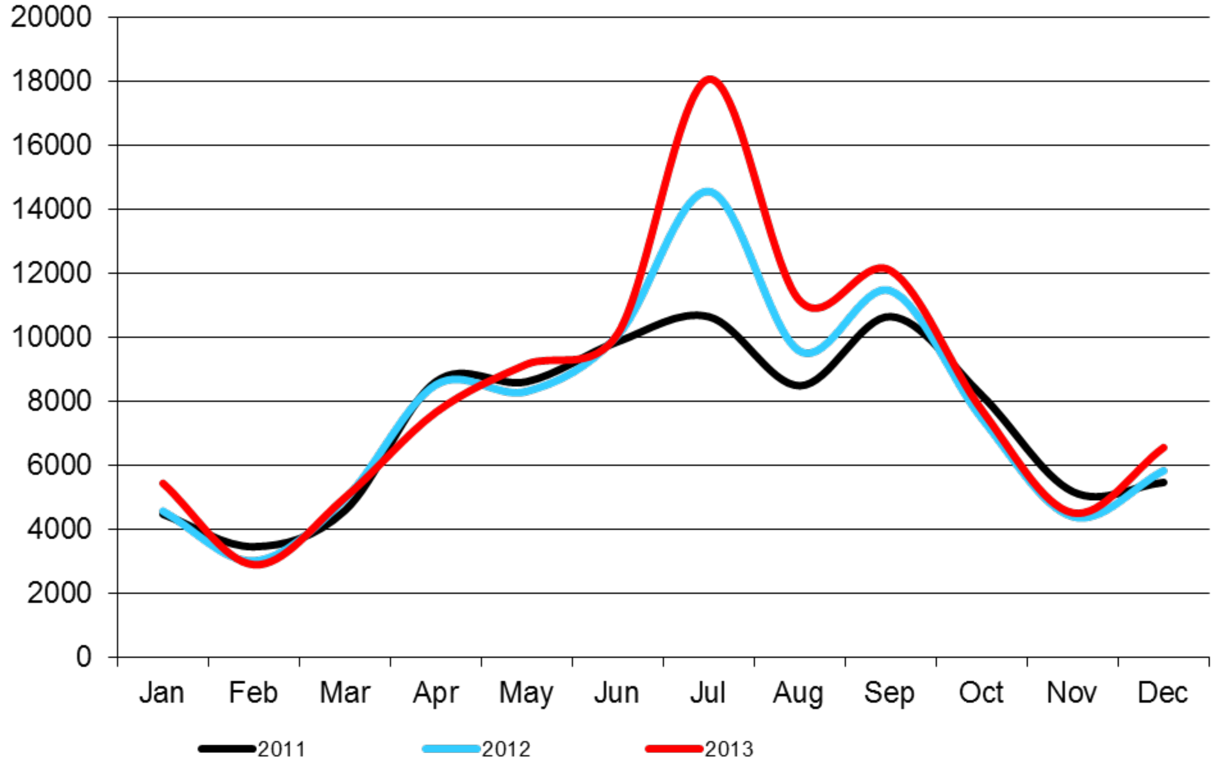
*Source: VISIT**FLANDERS** based on GDS*

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



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

Figure 15: Australian overnights in Flanders – seasonality 2011-2013



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

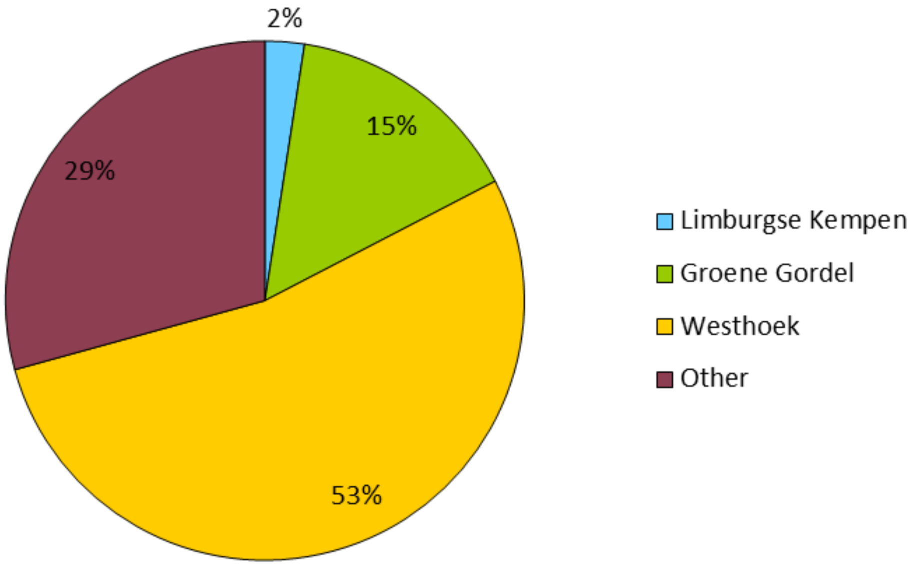
7. Distribution in the Flemish countryside

Table 11: the Australian market in the Flemish countryside, 2013

	overnights	%
Limburgse Kempen	340	2%
Groene Gordel	2.074	15%
Westhoek	7.400	53%
Other	4.064	29%
Flemish countryside	**13.878**	**100%**

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

Figure 16: Australian overnights in the Flemish countryside, 2013



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

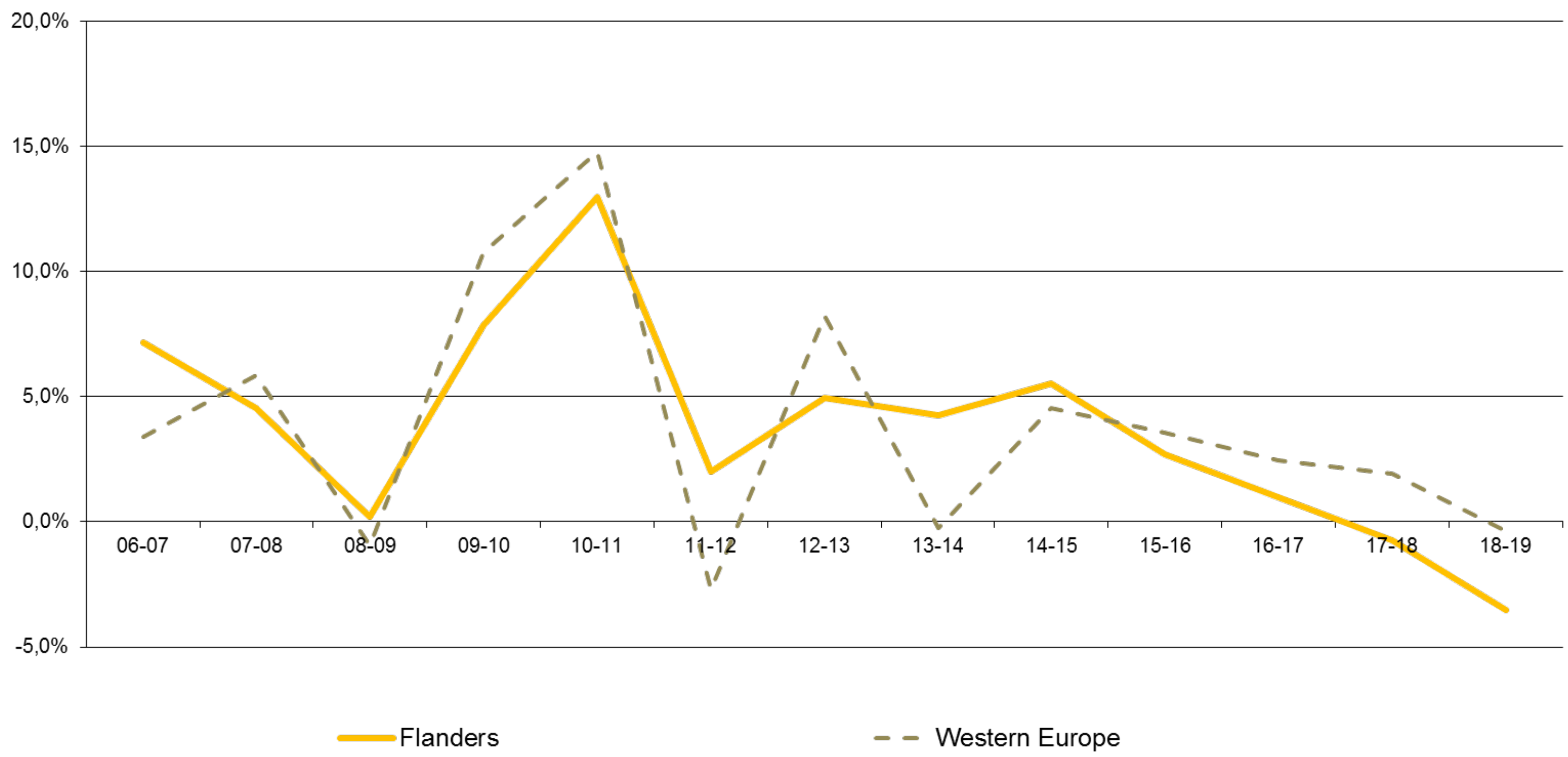
8. Country benchmark

Table 12: Trend and forecast of the Australian market in Flanders and Western Europe (2009-2018, x1.000, in arrivals)

destination	**2009**	**2010**	**2011**	**2012**	**2013**	***2018***	***2009-2013***	***2013-2018***
Flanders	35	38	43	43	46	*52*	***+30,5%***	***+13,3%***
Western Europe	3.266	3.619	4.153	4.041	4.373	*4.932*	***+33,9%***	***+12,8%***

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

Figure 17: Trend and forecast of the Australian market in Flanders and Western Europe (2007-2018, in arrivals)



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

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.

D. LIST OF FIGURES AND TABLES

July 2014