



Regional Context Survey East-Flanders

June 2017

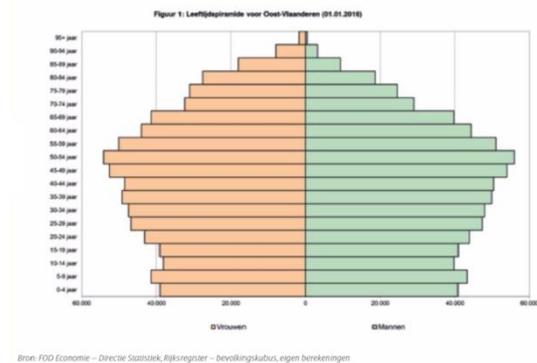


1. Socioeconomic situation

1.1. Population

There are 1.489.058 inhabitants in East-Flanders (50,7% women, 49,3% men), on a surface of 2.982,2 km², with a population density of 499 inhabitants/km².

The population of East-Flanders grew with +9,4%, compared to the year 2000. As most Western countries, East-Flanders has an aging population.



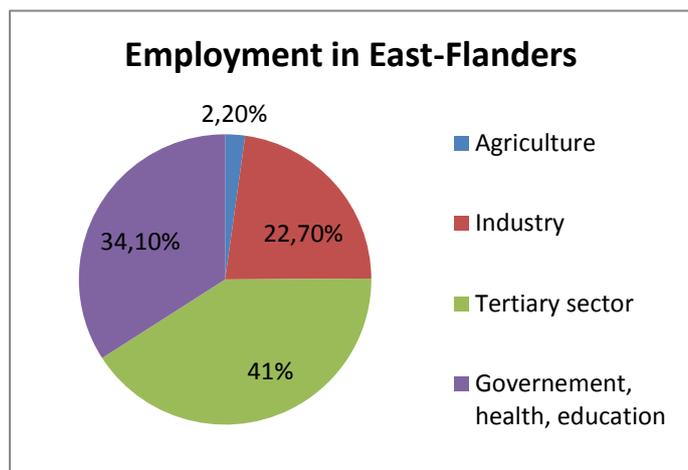
1.2. Employment and SMEs

591.605 people are at work. 18,01% of them are self-employed. 7,4% of the population (18-65 year) is unemployed.

The services sector or tertiary sector is very important. The tourism, recreation and hospitality sector is part of this services sector and employs about **22.000 persons**. This is 4% of total employment.

In this tourism sector, 42% is self-employed, 58% is employed in an SME.

The most important employers in the tourism sector are restaurants (56%). Followed by bars (14%), travel agencies (10%), hotels (9%), catering services (8%), and other (3%).



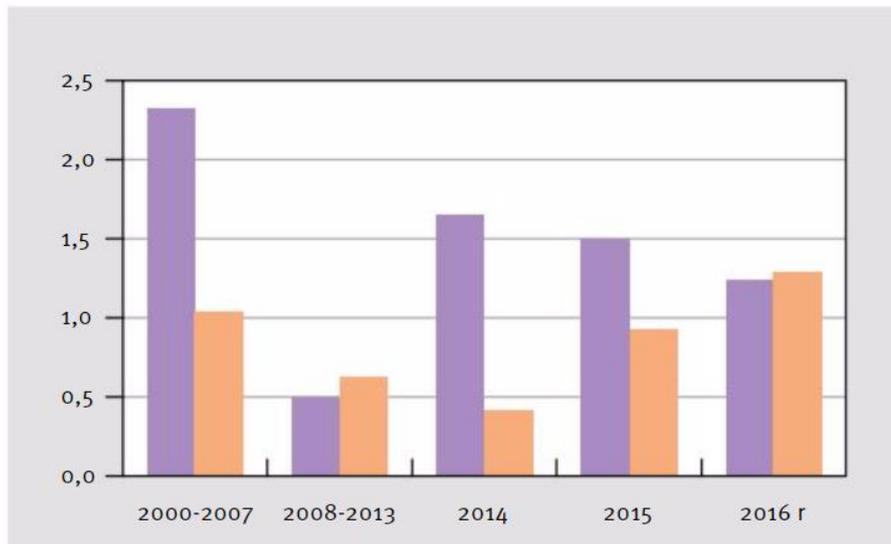
East-Flanders has 35.300 enterprises. 21,7% of the enterprises in Flanders is located in our province. Most of these enterprises are SMEs: only 2,2% has more than 99 employees. 10,8% has 20-99 employees, 87% has less than 20 employees.

Of these 35.300 enterprises, 8,01% is active in the tourism sector: **2.828 SMEs**. They operate on a relatively small scale. 89,7% has less than 10 employees. Most SMEs are run with capital of local origin (family-based entrepreneurship).

In summary: the tourism sector consists of 2.828 SMEs employing about 12.000 persons, and about 10.000 self-employed initiatives.

1.3. Economic growth

In 2016, the GDP of East-Flanders grew with 1,2%. The evolution of the GDP (purple) and employment (orange) is shown in the figure below:



East-Flanders is known as a region of knowhow, with important research and development (R&D) facilities at Ghent University, knowledge centers and spin-offs. Biotech, ICT, medical software, environmental technology, textile are strong innovative clusters. Concerning the **'gross value added'**, following sectors are very important to wealth creation: construction, steel and metalworking (Arcelor-Mittal), car and truck assembling (Volvo), dredging (De Nul), pharma, chemical sector and the food sector.

The tourism sector creates about 1,6% of the gross value added in East-Flanders.

1.4. Education

Flanders has few natural sources other than the grey matter of its population. And it is investing heavily in these brains.

According to OECD figures, Flanders spent 5.8% of its gross domestic product on education. In Flanders schooling is obligatory until age 18, but many young people study longer. More than half of the active population holds one or more university or college diplomas.

Ghent is a city of education. The University of Ghent and the city's other higher education institutions count together 65,000 students. No other Belgian city has more. The University of Ghent holds a unique position as the only Flemish university with a full range of (life) sciences faculties.

On top of this, tens of thousands of children and young people attend every day one of Ghent's primary and secondary schools. But other East Flemish cities also offer a wide range of disciplines. Specialist training for every profession can be found in East Flanders. This dense network of schools and training facilities ensures a pool of qualified graduates in various fields. Adults looking for higher or additional qualifications can follow adult education courses during evenings or weekends.

Vlerick Leuven Gent Management School is an academic, international management school which is making a major contribution to the professionalization of management and encouraging entrepreneurship. The Vlerick School fulfils this mission by conducting research that is both rigorous and relevant and by providing high quality management training with a specific European dimension.

It is Flemings' **language skills** in particular that attract foreign enterprises. The official language in Flanders is Dutch, but many people also speak English, French and German. Multilingualism in

Flanders is no exception, but a tradition. Since the Middle Ages, Flanders has been at the crossroads of the busiest European trade routes, making language skills an economic necessity.

Today's Flemings well understand the economic advantages that multilingualism offers. Flemish secondary schools are keen for their students to have an active command of foreign languages, and a significant number of curriculum hours are earmarked for second and often third and fourth languages.

2. Tourism system in East-Flanders

2.1. Actors & governance

Tourism development in Belgium has four levels:

- Regions (Flanders, Wallonia and Brussels)
- Provinces (ten, of which East-Flanders)
- Subregional (in East-Flanders there are five touristic regions)
- Municipalities

2.1.1. Flanders Region

In Belgium, tourism is organized at regional level. (Flanders, Wallonia and Brussels). 'Toerisme Vlaanderen' or Visit Flanders is the tourism agency of the Flemish government and aims to attract foreign visitors. Visit Flanders has offices in Tokyo, New York, London, Paris, Netherlands,...

Mission:

'By 2020, we want to develop tourism, in a sustainable way, to a real economic growth accelerator. By that, we realize more return on investment, employment and wellbeing.'

Activities:

1. Investments in and support of the touristic assets in Flanders with sufficient opportunities to attract tourists from abroad
2. Marketing activities aimed at attracting more visitors to Flanders from outside our boundaries
3. To make tourism possible for every inhabitant (erase financial or physical limits for holidays)
4. To invest in more professionalization of the tourism sector (service quality design)

Communication focus:

- Cultural heritage & art (e.g. Flemish Masters)
- Gastronomy (food: e.g. beer, chocolate)
- Cycling and cycling heritage
- Craftsmanship

2.1.2. Province of East-Flanders

The Flanders Region has five provinces. Of which East-Flanders is one. The province of East-Flanders is a local government, with an own legislative body. The province stimulates tourism development and promotion through the organization 'Toerisme Oost-Vlaanderen' or 'Tourism East-Flanders'. The 'Economic Council of East-Flanders' also invests in regional development (promotion of local products and stimulating entrepreneurship).

a. Tourism East-Flanders

Mission:

'Develop and promote recreation and tourism in East-Flanders, aimed mainly at the domestic market and with an emphasis on cooperation on a subregional level with municipalities and the private touristic sector.'

Activities:

- To develop and maintain sustainable, qualitative and innovative tourism products. Emphasis is on cycling and hiking (routes)
- To advise and stimulate the tourism SME's on creating new tourism products (cooperation between public and private actors and between private and private actors)
- To coordinate different local tourism initiatives on a subregional level
- To communicate and promote (known and less known) tourism destinations and initiatives in East-Flanders
- To attract new business tourism (MICE)
- To act as a knowledge and expertise center for all stakeholders
- To stimulate new value creation through cooperation between tourism SMEs and other sectors such as sports (e.g. cycling), culture, local food sector, horticulture (flowers) and crafts.

Even though East-Flanders is attracting more and more tourists, diversification is a major challenge. Tourism is mainly focused on the historical cities and cycling. Leveraging this tourist attraction to less known (often rural) areas and other sectors (local food, culture/material and immaterial heritage, crafts) and activities (hiking, water tourism,...) in East-Flanders brings many opportunities. Economic discovery tourism is another underutilized asset to valorize our East-Flemish products of excellence in the food sector (beer, chocolate, hams).

b. Economic Council of East-Flanders

The Economic Council of East-Flanders has two main purposes :

1. First, carrying out the defined Economic and Entrepreneurship policy of the Province of East-Flanders
2. Second, influencing the policy making and suggesting policy instrument changes to the Province.

The organization has a Board of Directors of which the majority are members of the Provincial legislative body.

Mission:

'The Economic Council of East-Flanders is the regional development association founded by the Province of East-Flanders. EROV has as mission to strengthen and support the socio-economic development in the province of East-Flanders.'

Activities related to tourism:

1. EROV stimulates the relationship between regional products, the food sector and tourist SMEs.
2. EROV stimulates new entrepreneurship in the tourism sector.
3. EROV organizes management programs for SMEs and stimulates the regional food cluster.

The Council hosts a stakeholder group to tackle the described challenges.

2.1.3. Subregional

The Province of East-Flanders is divided in five touristic regions + the city of Ghent:

1. Meetjesland
2. Waasland
3. Vlaamse Ardennen
4. Leiestreek
5. Scheldestreek



Each subregion has the following mission:

'Implementing the subregional tourism policy and promoting the region.'

This subregional activity is governed by a cooperation between:

- Tourism East-Flanders
- The local municipalities
- The private sector

The municipalities raise funds, according to their importance in terms of tourism and population. These funds are doubled by Tourism East-Flanders. Additionally, Tourism East-Flanders provides manpower (team of 2 persons per region) and offers additional support (coordination or development at provincial level) and money for regional marketing activities (regional websites, distribution of brochures,...).

2.1.4. Municipalities

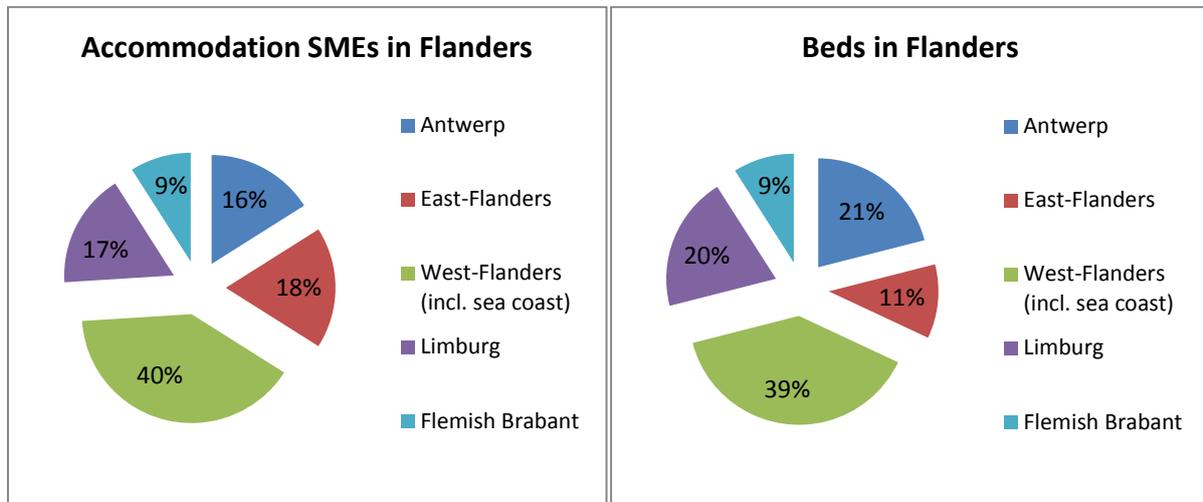
East-Flanders has 65 municipalities. Each municipality has its own activities on stimulating local tourism. For example, they create local maps with restaurants and tourist attractions.

2.1.5. Other stakeholders in East-Flanders

- Horeca East-Flanders:
Federation of the hotels, restaurants and bars in East-Flanders
- Chamber of Commerce/Employers organizations:
VOKA and Unizo defend the interests of local companies and the self-employed.
Boerenbond and ABS defend the interests of the farmers and local producers.
- Knowledge institutions such as Ghent University
- Logeren in Vlaanderen vzw promotes and supports small scale lodging such as B&B's and holiday homes
- The private tourism sector (lodging accommodation; restaurants and cafés, musea, recreation parks, attractions, visitor guides, ...)
- Other organizations focusing on tourism and recreation such as Pasar, VTB, ...

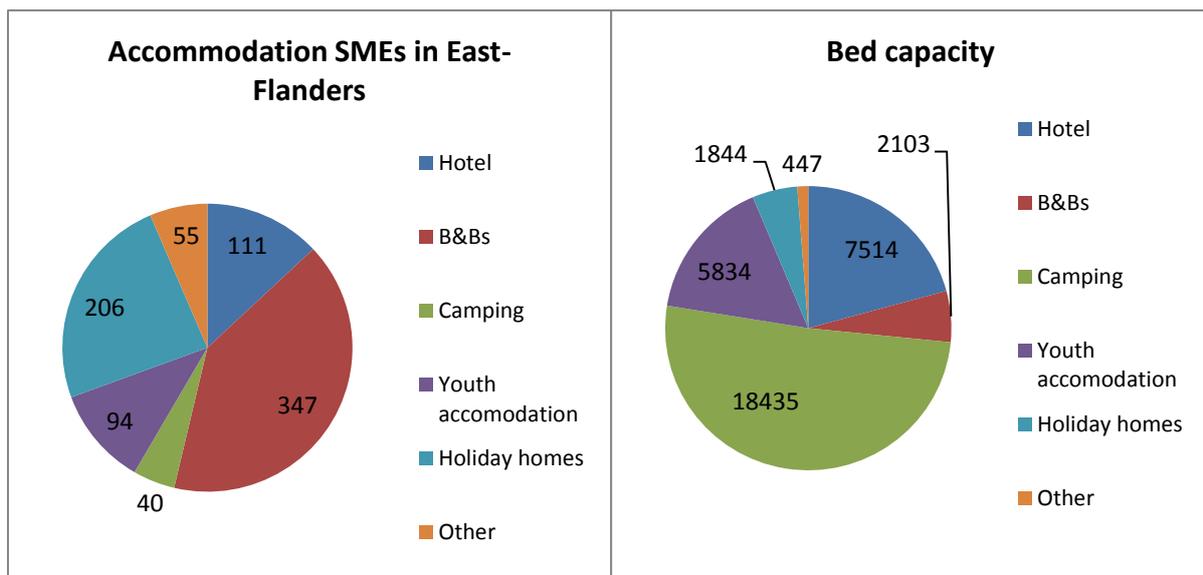
2.2. Facilities (main facilities supporting tourism)

East-Flanders hosts 18% of all SMEs in the accommodation sector in the Flanders Region. They represent 11% of the beds in the Flanders Region.



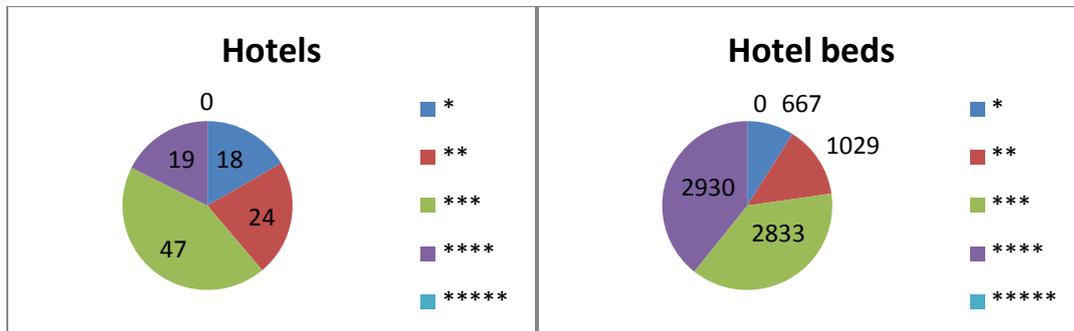
In East-Flanders, 853 companies create a **capacity of 36.177 beds**. The amount of beds is increasing, about 1,2% a year. Most of these companies are B&Bs or guest rooms and holiday homes. However their capacity is limited (small scale).

40 campings offer a lot of bed capacity. 111 hotels together stand for 7514 beds. Ghent has an important role in lodging: 7804 beds (21%) are located there. The city hosts 59% of the hotel beds.



Taking a better look at the hotel sector we can see a broad variety of hotels. Most of them have three stars (***)

21% of the hotels is bound to a (international) chain. Those chain hotels create 43% of all the hotel beds.



In addition to these accommodation facilities, East-Flanders has about 5.000 restaurants/places-to-eat, 2.500 cafés/bars and 750 initiatives in the catering sector.

2.3. Connections (main connections to your destinations area)

East-Flanders is located in the center of Europe, between important cities as London, Paris, Amsterdam, Brussels.

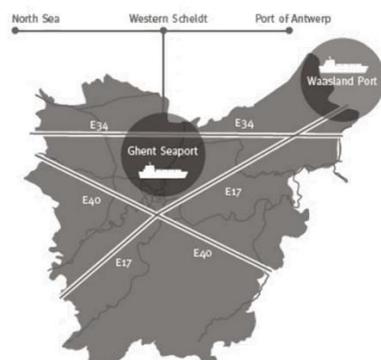
In the centre of Europe

- 1.478.509 inhabitants
- 2.982,2 km²
- 496 inhabitants/km²

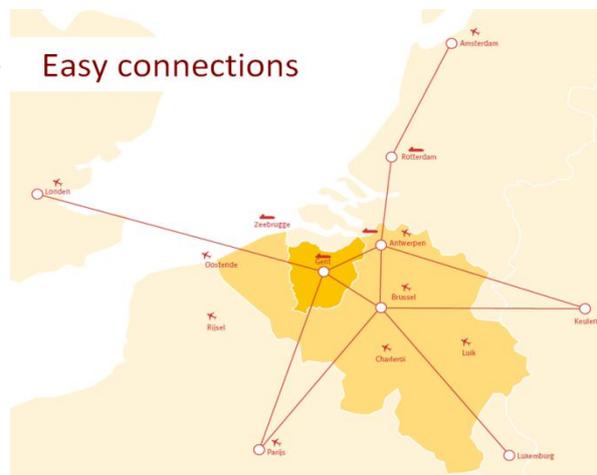


It has easy connections with Brussels National Airport and Charleroi Airport. Three main car highways cross the province (E40, E17, E34). There are railway connections to almost all European countries.

Sea ports and road network



Easy connections

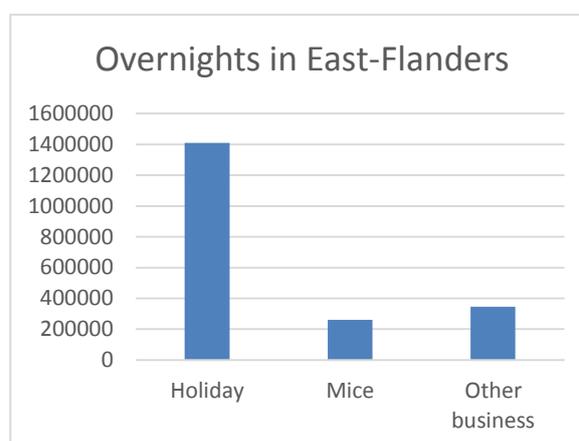
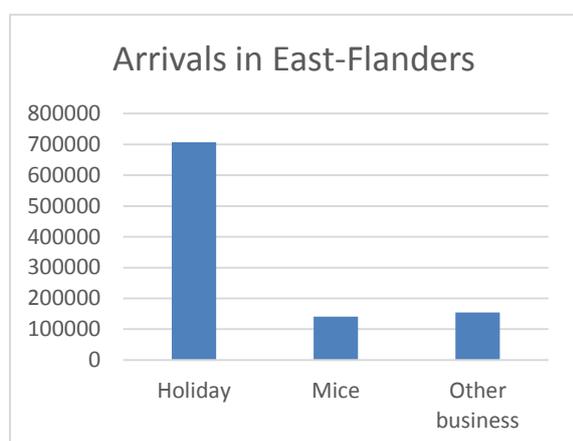


3. Tourism market

3.1. Composition (who comes to visit your region)

3.1.1. Arrivals and overnights

In 2016, East-Flanders counted **1.001.959 arrivals**. Of which 50,5% are foreigners. 49,5% are domestic visitors. These visitors stayed in East-Flanders for an average of 2 nights. Together there were **2.015.175 overnight stays**. Equally divided between domestic and foreign visitors. Arrivals and overnight stays are largely for holiday purposes but MICE and business tourism also offer opportunities.



2016 was a difficult year for tourism in East-Flanders. Although there were more Belgian visitors (+4,24% arrivals); the foreign tourist arrivals decreased with -7,01% due to the terrorist attacks. Overnight stays from foreigners decreased with -8,60%.

Looking at the composition of the foreign visitors, we can see a lot of tourist from neighbor countries:

- Netherlands 30%
- Germany 12,7%
- UK 11,8%
- France 8,9%

Other important countries:

- Spain 5,1%
- USA 4,3%
- Poland 3,4%
- Italy 2,7%
- Sweden 1,4%
- Switzerland 1,1%
- China 1,1%

The terroristic attacks caused a decrease in tourists from most countries, but especially from far away countries:

- India -53,4%
- China -27%

- Russia -23,8%
- Japan -20,7%
- USA -20,2%
- Italy -18,5%
- Germany -13,4%

Some other countries managed to grow (2016 compared to 2015):

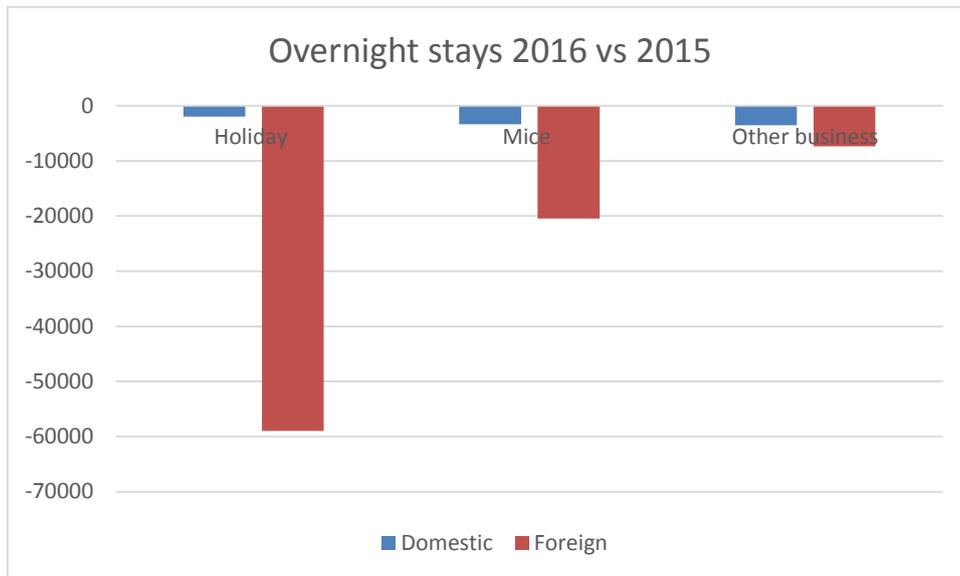
- Southern Europe:
 - o Greece +22,8%
 - o Portugal +8,5%
 - o Spain +1,5%
- Scandinavia:
 - o Norway +37,8%
 - o Sweden +4,6%
 - o Finland +11,8%4

Overview of the overnights in 2016, compared to 2015 (in Dutch):

Overnachtingen naar herkomstland

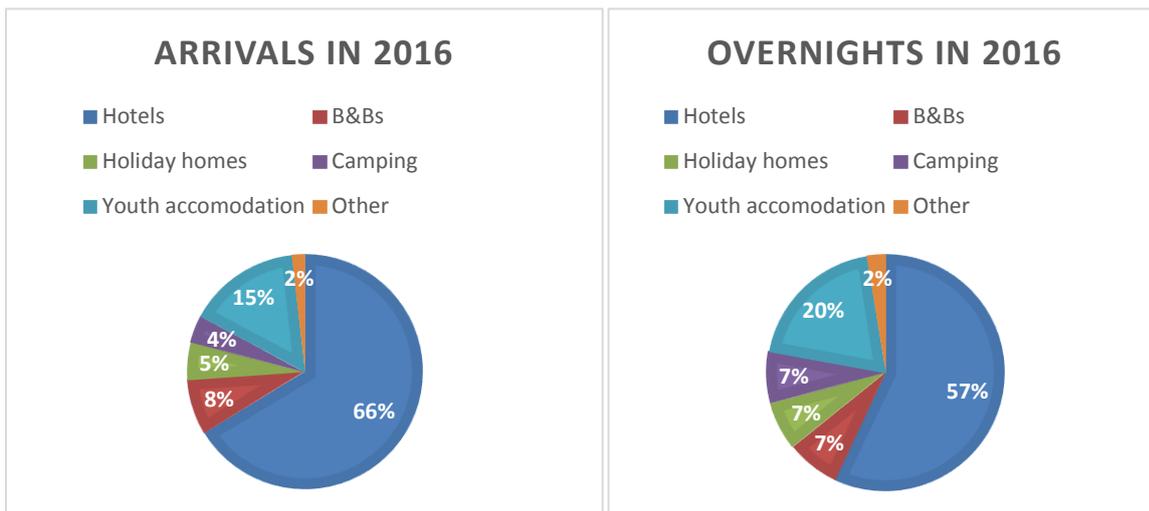
Land van herkomst	2015	2016	2015-2016	2015-2016 (%)	Land van herkomst
België	1 015 389	1 006 538	-8 851	-0,9%	België
Nederland	325 545	306 577	-18 968	-5,8%	Nederland
Duitsland	147 077	127 322	-19 755	-13,4%	Duitsland
Frankrijk	100 053	88 872	-11 181	-11,2%	Frankrijk
Verenigd Koninkrijk	125 758	117 895	-7 863	-6,3%	Verenigd Koninkrijk
Luxemburg	6 102	6 824	+ 722	+11,8%	Luxemburg
Ierland	7 687	6 005	-1 682	-21,9%	Ierland
Denemarken	7 384	7 332	-52	-0,7%	Denemarken
Zweden	13 489	14 113	+ 624	+4,6%	Zweden
Finland	3 799	4 249	+ 450	+11,8%	Finland
Italië	33 834	27 580	-6 254	-18,5%	Italië
Spanje	50 222	50 958	+ 736	+1,5%	Spanje
Portugal	7 557	8 203	+ 646	+8,5%	Portugal
Griekenland	2 801	3 439	+ 638	+22,8%	Griekenland
Oostenrijk	7 357	6 784	-573	-7,8%	Oostenrijk
Polen	32 432	33 716	+ 1 284	+4,0%	Polen
Tsjechië	9 086	7 771	-1 315	-14,5%	Tsjechië
Hongarije	5 865	5 214	-651	-11,1%	Hongarije
Roemenië	6 649	6 165	-484	-7,3%	Roemenië
Noorwegen	4 549	6 269	+ 1 720	+37,8%	Noorwegen
Zwitserland	12 701	10 970	-1 731	-13,6%	Zwitserland
Rusland	10 161	7 744	-2 417	-23,8%	Rusland
V.S. Amerika	53 551	42 728	-10 823	-20,2%	V.S. Amerika
Canada	7 079	6 815	-264	-3,7%	Canada
Japan	5 258	4 171	-1 087	-20,7%	Japan
China	14 674	10 712	-3 962	-27,0%	China
India	12 632	5 881	-6 751	-53,4%	India
Israël	2 330	3 346	+ 1 016	+43,6%	Israël
Turkije	5 252	5 538	+ 286	+5,4%	Turkije
Australië	9 617	8 729	-888	-9,2%	Australië
Brazilië	6 107	5 375	-732	-12,0%	Brazilië
Andere	58 769	61 340	+ 2 571	+4,4%	Andere
Buitenland	1 095 377	1 008 637	-86 740	-7,9%	Buitenland
ALGEMEEN TOTAAL	2 110 766	2 015 175	-95 591	-4,5%	ALGEMEEN TOTAAL

The figure below shows the decrease in foreign visitors for 2016, mainly due to a decrease in holiday visits from foreign tourists.



3.1.2. Where do the tourists stay?

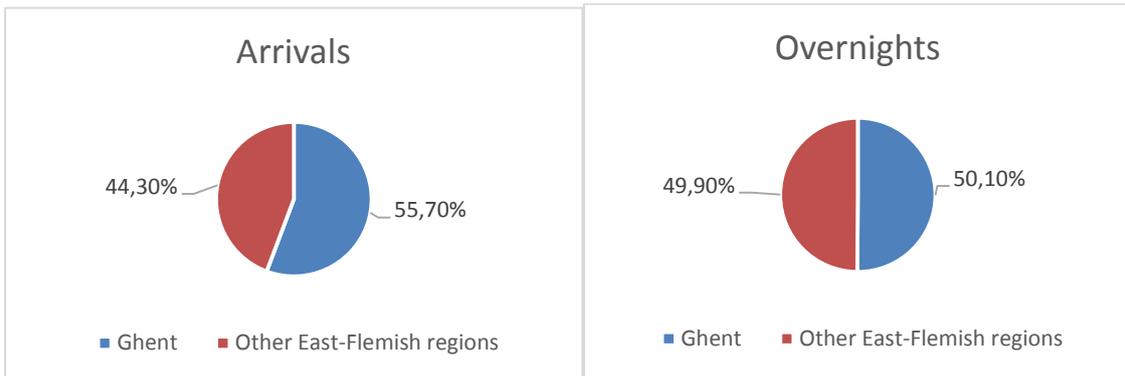
Most tourists stay in hotels: 66% arrive in a hotel, creating 57% of the overnights.



Tourists staying on a camping, stay longer, about 3,76 nights. Hotel visitors only stay for 1,73 nights.

	Average stay (nights)
Hotels	1,73
B&Bs	1,92
Holiday homes	2,55
Camping	3,76
Youth accommodation	2,56
Other	2,92

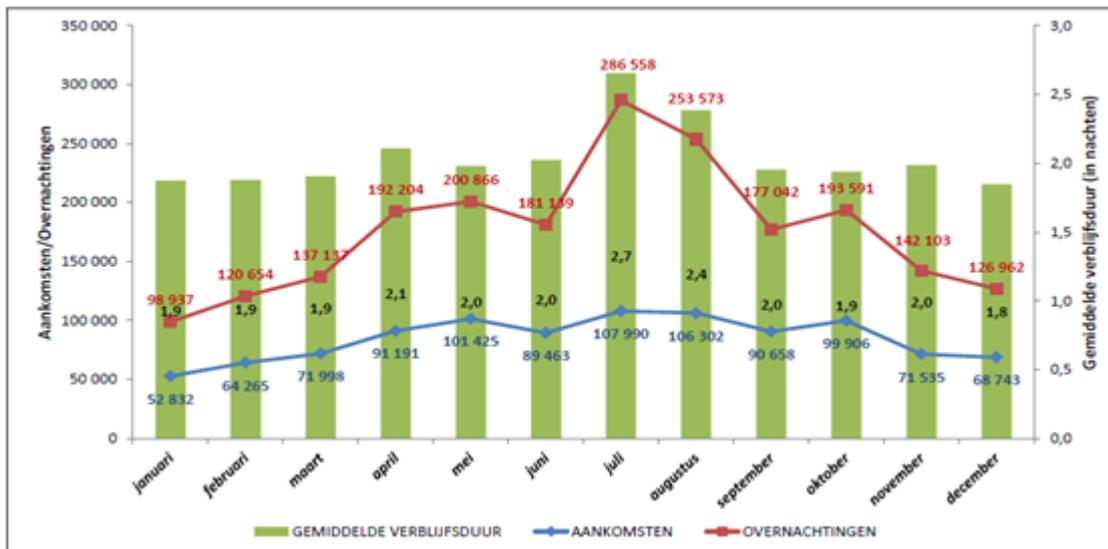
The city of Ghent is of great importance in tourist arrivals (55,7%) and overnight stays (50,1%).



3.1.3. Seasonality

The figure below shows arrivals (blue line) and overnight stays (red line) all year round with a peak in summertime. Wintertime is the most quiet period.

The average length of stay in summer is also higher (green blocks).



3.1.4. Tourists/Inhabitants

East-Flanders has 1.478.509 inhabitants. With 1.016.308 arrivals; the tourist/inhabitant ratio is 68,7% or about 0,68 tourists per inhabitant.

The city of Ghent has 257.000 inhabitants. With 566.275 arrivals, the tourist/inhabitant ratio is 216% or about 2 tourists for every inhabitant.

To make a comparison, Bruges (West-Flanders) has 118.000 inhabitants and about 7,8 million arrivals. This 66 tourists for every inhabitant.

3.1.5. Profile of the tourists (survey 2011)

A survey in 2011 on the tourists from the Netherlands, Germany and Flanders, showed following conclusions:

- Average age: 50,1 year
- Average group composition: 4,9 persons
- 36% travels with children
- Trends 2005-2011: older tourists, bigger groups, more retired people, without children
- 94% travel by car
- Average length of stay: 4,3 nights (is decreasing)
- Why (East-)Flanders:
 1. Hiking and cycling
 2. Landscape
 3. Easy, quiet holiday
 4. Easy to get there
- Spend: 75,52 euro for every person each stay
- Satisfied to very satisfied about their stay

A new survey is taking place in 2017.

3.2. Targets (which are the main target groups addressed tourism in your region)

Domestic visitors:

- One day tourists to our cities and activities
- Longer term stays in the green regions; both groups as families/individuals

Foreign visitors:

- Focus on longer term stays:
 - Cycling and hiking
 - Art & Culture
 - Gastronomy
 - MICE and business

Tourism is mainly focusing on the historical cities and cycling. Leveraging this tourist attraction to less known (often rural) areas and others sector (local food and products, culture and heritage, walking, water tourism, crafts) in East-Flanders brings many opportunities. Economic discovery tourism is another underutilized asset to valorize our East-Flemish products of excellence in the food sector (beer, chocolate, hams).

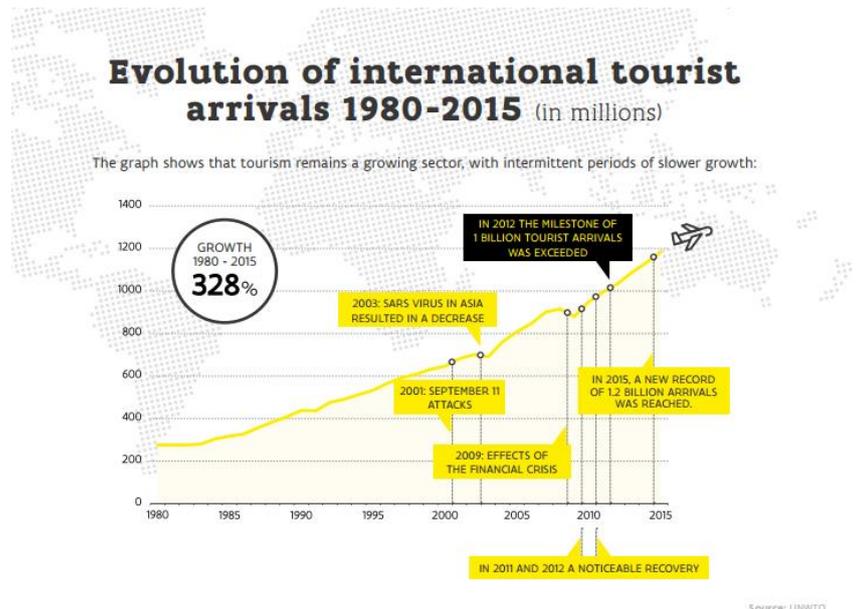
3.3. Trends (what are the long-term and the emerging trends)

3.3.1. Increasing arrivals

In Flanders we can see a growth in the amount of arrivals (+2,9%/year in the last ten years). On the other hand, the amount of overnight stays only grows with +0,6%/year. The average duration of overnight stay went from 3 nights to 2,5 nights.

The economic crisis (2008-2009) had an (rather limited) impact on arrivals (stagnation, no growth). The terrorist attacks of 2015-2016 had a major impact on arrivals from abroad, and especially far away countries. The tourism sector appears to be very vulnerable to these external events.

On the other hand the sector seems to recover fairly quickly leading to better figures from the end of 2016 on. The effect on the province of East-Flanders and the city of Ghent certainly is much less strong than the effect on the capital of Brussels. The domestic market did not experience great fluctuations as a consequence of terror/attacks.



3.3.2. More visits, older people, shorter stays, interest in own regions and regional products

People tend to make more trips during the year but with a shorter duration and close by (not only 1 long holiday far away in summer time). Figures show more 50+ visitors and new target groups (e.g. reconstituted family, peer groups). With interest in authenticity, tranquility, own regions and local products.

3.3.3. Dreaming of tourism

In planning and discovering a new tourism destination; friends and peers have a big influence. For example through social media, blogs, tripadvisor,...

Visual storytelling becomes of big importance in promoting a destination. Inspiring people through the sharing of experiences and authenticity (e.g. Instagram, pinterest).

Being online as a tourist promotion initiative is an absolute requirement.

3.3.4. Booking a trip

Online booking is standard. Disrupting factors threaten regular accommodation (e.g. Airbnb).

Tourists judge price and quality online (photos, reviews).

Tourists take their time to book and confirm a trip (very last-minute). Sometimes they even book while already on the spot.

They are very well organized and informed through the internet.

Most important decision parameters: price, activities, quality/facilities, weather and cleanliness.

3.3.5. Tourism on the spot

- Experience economy! Tourists want to be a part of something, want to do things. Importance of authenticity, sustainability, wellbeing and health. Personal development as a driver for tourism trips.

- LOHAS: Lifestyles of Health and Sustainability. Sustainable tourism is a challenge.
- In reaction to a globalizing world, tourists look for 'authenticity'. This implies attention for regional products, crafting, coziness, family trips, cocooning,...
- The tourist wants to be online: always and free.

3.3.6. Sharing is caring

Tourists tend to share their experiences with peers online, mostly immediately.

3.4. Competitors (which regions / world areas are your competitors)

East-Flanders is competing with other:

- Belgian regions and cities
 - For domestic tourists:
 - Culture and Art: e.g. Bruges, Antwerp
 - Cycling and walking: sea coast, Limburg, Westhoek
 - For foreign tourists
 - Culture and Art: Bruges, Antwerp, Brussels
 - Cycling: East-Flanders aims to be 'the' cycling/cycling heritage region
- European regions
 - Foreign tourists can choose from a wide variety on
 - other historical cities,
 - other (often more) green and open landscapes
 - other sport regions

The MICE sector in East-Flanders competes with other Belgian regions such as the Brussels region, Antwerp region, Bruges region and Leuven region.

Compared to West-Flanders and Limburg, tourism in East-Flanders is less important from an economic point of view. All Flemish provinces focus - next to the cities of art and cultural heritage -, on cycling and hiking.

On the other hand, East-Flanders still has a lot of opportunities for further touristic development such as local products (beers and flowers) and the experience of it (local breweries, growers of flowers), cultural heritage (castles in the environment of the river Scheldt, industrial heritage, cities and villages), cycling heritage (Tour of Flanders), unique landscape elements such as bergs and cobbles in the Flemish Ardennes, MICE,

3.5. Destinations and attractions (describe your main assets and destinations)

The city of **Ghent** is the most attractive destination:

- cultural heritage
 - 2 medieval castles
 - 3 beguinages
 - 5 abbeys
 - 23 museums
 - 1 Belfry (unesco)

- 1 Adoration of the Mystic Lamb (Van Eyck)
- hundreds of historic buildings and churches
- no other city in Belgium has as many classified buildings as Ghent
- university city (65.000 students)
- gastronomy
 - 653 restaurants
 - 620 cafes
 - 250 different sorts of beer
 - more than 10 chocolate shops
- shopping and fun
 - 30 hectares of pedestrian space in the city center
 - the largest street festival in Europe (The Ghent Festivities) in July
 - countless canals
 - foodies (veggie)

The others touristic regions can also offer a lot:

Meetjesland:	open space, green/flat landscape, agriculture and nature, peace of mind, hiking and cycling, local products, family friendly
Flemish Ardennes:	beautiful/specific landscape (bergs and cobbles), Tour of Flanders and cycling heritage, hiking (points of view from 'hills', forest region), horse riding and adventure, regional products, medieval city of Oudenaarde (tapestry), sport and recreational parks
Waasland:	water, sailing, regional products, typical villages, flower region, Waasland port and port of Ghent, shopping
Scheldeland:	water, sport recreational water parks, cities and history of Aalst and Dendermonde
Leiestreek:	water, art and culture, typical villages, walking and cycling, industrial heritage

The regions offer opportunities to attract tourists coming to Ghent, looking for rest and green to stay, to take a rest, or to lengthen their stay after city break. It also alleviates growing pressure on cities, and offers other activities, besides the city visit, as incentive or in combination with a meeting.

4. Tourism support actions in your area / region

The East-Flanders policy is developed and carried out by Tourism East-Flanders, the five East-Flemish regions (Waasland, Meetjesland, Vlaamse Ardennen, Leiestreek, Scheldeland) and the Economic Council of East-Flanders (on entrepreneurship and connections with other economic sectors).

The policy strives to improve the wellbeing of East-Flanders inhabitants and the welfare of the East-Flanders SMEs by stimulating and offering innovative, creative, sustainable and qualitative forms of recreation and tourism in and attracting tourists to East-Flanders. *'Stimulating tourism and recreation in a sustainable and professional and qualitative way'* is a major priority of this strategy.

This objective is operationalized through the 'Strategic Policy Lines for Tourism in East-Flanders 2014-2019'. A yearly 'Tourism Action Plan' for Tourism East-Flanders organization is derived from this Strategic Plan. The strategic plan describes the development of SMEs in the tourism sector, especially focusing on the relationship between tourism development and regional marketing.

Each East-Flemish region has its own long term strategic plan on how the region should further develop and be marketed as a tourist destination.

The Economic Council of East-Flanders also has a long term strategic plan (2014-2019).

Important themes

- hiking and cycling
- cycling heritage
- gastronomy, local food (e.g. beer) and local products
- cultural heritage

Special (recent) emphasis in management:

- overnight stays/accommodation sector
- MICE
- hostmanship, tourist welcome
- marketing and communication
- support and cooperation for more involvement, professionalization, innovation and creativity
 - public-public/public-private/private-private
 - both in tourism sector and between tourism and other sectors

4.1. Summary of the tourism support actions and link to RIS3

As tourism in East-Flanders is doing well, new startups and new activities/themes and diversification/broadening in the tourism sector are interesting (see above).

On the other hand, performance and professionalism of the existing tourism SMEs could also be improved. Many SME's do not pay enough attention to innovation and creativity, having sometimes insufficient feeling with needs of tourists or marketing skills. Many tourist partners (e.g. B&B's) are very small scale (efficiency) and are not always professionally organized (second job). They often want to attract more tourists but do not always know how to do this. They not always have or share enough information about tourism or tourism activities in the region or about other tourist partners

(additional services or alternatives). Cooperation between partners (public-private and private-private) could enhance the service delivered and product offered.

A holistic approach is created, with different actions to support/stimulate tourism development and tourism SMEs:

- Analyzing and sharing relevant tourism **figures** (stays, happiness of tourists, visits, MICE,...), detecting trends, and building a policy to strengthen the tourism SMEs (e.g. defining new target groups of tourists for calmer months in a year, new activities)
- Providing information/education on **marketing skills**, use of online media, booking channels, qualitative welcome/hostmanship, ...
- Organizing **network moments** on which SME's can get to know other tourist partners and the regional tourism product; organizing regional familiarization trips (go and see it for yourself)
- Inspiring tourism SMEs and tourist partners to innovate their offer and develop **new products**; inspiring them to work together to enrichen products; cooperating with the sector around themes/products;
- Cooperation with the **local food sector (regional products)** – creating added value: 'visit and taste East-Flanders'. Cooperation on local products (beer/flowers) stimulating creativity and responsibility; organizing participative processes: bring partners together and let them think about how to improve products and services; e.g. tourist welcome/hostmanship, colleague groups, ...;
- Working on **'Traditions' and stories behind**: stimulating SMEs to create added value by storytelling on regional food, cycling tradition (recreational tourism) and cultural heritage.
- Working together on improving the **experience** and full products (not just the beer but also the brewer, ...)
- Integrating **urban tourism** (cities as Ghent, Oudenaarde who attract most of the tourists) **with rural** environment visits (e.g. connecting cycling routes, referrals, cities as part of region, ...)
- Coping with **external uncontrollable events** (e.g. the negative effects of terror) which effect tourism figures (e.g. extra marketing campaign)
- Developing **Economic discovery tourism** to valorize our East-Flemish products of excellence in the food sector (beer, chocolate, hams) and other sectors (e.g. flowers).

The Flemish RIS 3, is looking at new product-service combinations, especially in increasing productivity and stimulating innovation. Cooperation between public and private actors, and cooperation between different sectors (e.g. tourism sector and agro-food) is described as crucial for success. The East-Flemish Smart Specialization strategy selected both the (re)creative sector and local food sector as cluster domains.

4.2. Policy actions to share/develop

A. TOURISM PRODUCTS:

4.2.1. Taste East-Flanders: Gastronomy and local products

- Promoting regional products as a touristic asset ('Lekker Oost-Vlaams'):
 - Regional products to visit (economic discovery tourism)
 - Public-private cooperation in the Butchers hall (promotion)
 - B&Bs and hotels with regional products
 - Experience regional food: food trips, workshops, market,...
 - Close cooperation with restaurants
 - Recipes
- Plan Beer: product creation, marketing, close cooperation with the brewers
 - Cluster/create a tourist product around different East-Flemish beers; collect information and stories on beers, breweries, authentic pubs, ...; creation of Plan beer maps with cycling and walking routes connecting breweries, authentic cafés, liquor stories where you can taste/see/buy East-Flemish beers; map contains a lot of history of beers, stories, tips form beer tasters, recipes with beers ...
 - Cooperation with tourist partners: hotels and B&B's for 'beer arrangements' (e.g. overnight stay + visit brewery + beer tasting); with breweries to open their production rooms for individual tourists, ...
 - Whole marketing campaign with special website, dedicated mailings, on line campaigns on facebook and You tube films, contest ('get to know your East-Flemish beer'), spots in cinema and on TV, ...
 - Beer calendar with overview of beer events, beer experience guide for sale, free magazine distributed by newsletters, ...
- Top gastronomy: 'Jong Keukengeweld' en 'Vlaanderen Lekker Land' Cooperation between different provinces and Tourism Flanders;
 - magazine on young kitchen rebels, distribution; marketing actions by Tourism Flanders abroad; marketing actions by provinces domestic market
 - actions on domestic market: top chefs offer top meals in top restaurants for cheap price to young people
 - actions abroad: top chefs take part in ambassador visits, participate in important cooking fairs, show cooking and tasting, cooking contests,
 - ambassadors: municipalities can participate in contest to become 'gastronomy ambassador' with a typical local product for 1 year (past action)
 - stimulate restaurants and cafés to use local products; cooperation with Horeca East-Flanders on gastronomy projects e.g. 'Taste the Flemish Ardennes' (placemats, menu cards, meals with local products);

4.2.2. Walking and cycling and cycling heritage

- innovative cycling network covering the whole province and even the whole of Flanders; provinces developed networks but did that in cooperation to

create network that is perfectly compatible and connected in the whole of Flanders and recently also with networks in Wallonia; provinces maintain the basis product and create network maps + inspiration guides + facilitate use of networks (e.g. online route planning), and stimulate the sector to create products (e.g. cycling routes on network for their clients); promotion of cycling through a cycling magazine with suggestions of routes;

- East-Flanders: Homeland of Cycling; enhance the experience of Tour of Flanders in the Flemish Ardennes; creating and clustering tourist products, cooperation with partners as the organizer of the cycling event, cycling musea, STRAVA, ..., creation of thematic routes and marketing activities
- Visitor Center of Tour of Flanders
- Collaboration between 5 Flemish provinces and tour operators and travel agencies; goal: get to know product + use is; inspiring (stories, themes, suggestion routes, ...) and work on
- Walking network covering large parts of the province; cf. cycling networks; flyers with suggestions of routes are printed and distributed to tourist partners (accommodation) so they get to know the product and can give information to their guests

4.2.3. Cultural heritage

- 'Flemish Masters': Van Eyck 2020
- Cities of Ghent (historical city), Oudenaarde (tapistry), Dendermonde (Ros Beiaard), Aalst (carnival)
- Beguinages and Belfries (Unesco)
- World war I (Scheldeland)
- Castles and rivers

4.2.4. Economic discovery tourism

- Flower region: public-private cooperation; inform growers and tourist partners of opportunities of local products; study touristic potential; inform growers and tourist sector; inspire them and facilitate connections between them; creation of a tourist product; marketing
- Waasland Port (& Fort Liefkenshoek)
- Regional cooperation platforms RESOCs: working together with municipalities and employer organisations on attracting/stimulating other sectors to participate in tourism activities (e.g. organizing company visits for tourists, 'open days', ...)
- Econotours in collaboration with employer organisations (VOKA)

4.2.5. MICE

- Attracting Meetings, Incentives, Conferencing and Exhibitions to Ghent and East-Flemish regions;
 - subregional: meetings and incentives by Flemish companies; familiarization trips for Flemish companies so they can get to know the meeting sector; promotion through website, e-newsletters, ...;

support of the meeting sector;

- Ghent: large scale conferences; cooperation with the university; marketing by participating at specialized fairs for conference organizers, ...

B. MANAGING THE TOURISM SECTOR:

4.2.6. Sector cooperation (public-private) focus on inform, inspire, facilitate cooperation and public-private cooperation to create products and promote products

- Strong communication: email, sector website, events
- Strong involvement in policy making
- 'Logeren in Vlaanderen': cooperation between tourism organizations and the lodging sector (< 15 beds)
- Professionalization of tourism SMEs
- Coping with non-registered stays (e.g. Airbnb)

4.2.7. Communication to tourists

- Social media: Youtube, facebook, Instagram, twitter,...
- On line campaigns and advertising, dedicated newsletters, promotion films (360° films), ...
- Printed media (experience guides, free magazines, maps)
- Blogging
- Other...

4.2.8. Welcoming the tourists

- No longer only hosting tourist offices in municipality buildings;
- Hosting tourist offices in e.g. a farm, a regional producers, private sector as ambassador for our regions (hotels, B&Bs, taxi-drivers, ...):

5. SWOT analysis

5.1. Strengths

Central position in Flanders, small distances;

Cultural heritage with rich history

Interesting and peaceful **landscapes** for domestic tourism

Cycling and walking as key asset; fully developed innovative cycling networks; walking networks in development

Regional products: beer, chocolate, flowers and other

Strong **involvement** of the tourism SMEs / willingness to work together

Cooperation between different levels: municipalities, provinces, Flanders

Local government with strong relationship with public and private tourism sector

5.2. Weaknesses

Getting tourists from the **city to the green** countryside (and vice versa)

A lot of domestic visitors – in need of more **foreign visitors**

All tourist assets are (very) good, but no outliers (cycling and walking focus in whole of Flanders); no large scale/popular touristic attractions (attraction park, ...) or accommodation partner (Pierre & Vacances, Center Parcs, ...)

Tourist partners usually **small scale**, not always professional exploitation; in need of management and marketing skills

Communicating our offer in an international context; subregions and provinces not known abroad as tourist destinations;

Small scale subregions

5.3. Opportunities

Storytelling

Valorizing the **experience economy**

Thematic development of:

- Growth potential of cycling tourism
- Gastronomy is world-class
- Art and Flemish masters are world-class (Van Eyck 2020)
- Water tourism
- Flowers
- Beers

Public-private cooperation and private-private cooperation both within tourism and with other sectors

Building the relation between tourism and other economic sectors (food, craftsmanship, agriculture, port,...)

Attracting more **MICE**

Tourist welcoming in tourist boards on unique locations and cooperation with private sector 'ambassadors'; **hostmanship**

Service quality more general

Professionalization and innovation in tourism SMEs

Cooperation with tour operators for cycling and walking holidays

5.4. Threats

Dependency on **economic** cycles (growth vs crisis)

Perception of **safety**, effects of possible terrorist attacks; strong effect from external factors on foreign market

Sustainability and tourism is an (coming) issue (although quite manageable nowadays) (cities)

Competition of other regions with more tourist assets; all regions in Flanders focus on cycling and hiking

Use of new and rapidly changing **communication trends**

Promotion and marketing without fully developed tourist product

6. East-Flanders Tourism Development Matrix

Policy theme	Strengths	Development priorities	Priority level
1) To develop better policy instruments that can help to: enhance the visibility and market uptake of known and less known destinations	Coping with seasonality (time and space): Homeland of Cycling in spring season. Tour of Flanders: cycling networks, visitor center, in landscape, time measure on hills,... Experience your own Tour of Flanders	Getting people from the city (culture) to the green surroundings (landscape) (using cycling routes from Ghent to the surroundings) / Longer stays	2
	Coping with seasonality: Events in wintertime: Ghent Light Festival, Castles and Christmas ; winter campaigns	Local food products as a unique selling point for calmer periods and less known regions?	
		Selling a region (e.g. Tuscany), instead of a city	
2) Valorise attractions through better marketing, branding and communication	Social media strategy and the importance of monitoring	Communicating on small unknown regions in an international context	3
	Printed magazine 'Stap af' and derivatives (direct mail, blog, community, ...)	Measuring service quality of the tourism sector	
3) Innovate the offer by clustering tourism SMEs and products	Structure and strategy on involvement and cooperation with tourism SMEs: sector cooperation focus on inform, inspire, facilitate cooperation to create products and promote products	Cluster program: regional and thematic	5
	Clustering the brewers: Plan Bier	Products on cultural heritage	
4) Increase synergies between tourism private and public stakeholders	Welcoming the tourist/hostmanship: tourist boards on unique locations. Making everyone who gets in touch with a tourist, an ambassador for the province	Excellence in MICE	5
	Butchers Hall cooperation public-private		

	Social economy maintaining the cycling and hiking routes		
5) Deliver more customised packages by diversifying the offer	Two customised packages: a) Flowers in East-Flanders: visit flower nurseries, walking and cycling routes, flowers and castles b) World War I in East-Flanders 1914-1918	Exploration of new niches: wedding, wellness,...	4
	City of Ghent: focus on 1.) veggie/foodie and 2.) kids	Festivals as a tourism product	
6) Leverage local value chains and excellence to develop thematic and experience oriented tourism	Regional food products: workshops and visits: cooperation with more than 200 producers (Lekker Oost-Vlaams) Gastronomy	Tourism and craftsmanship, creative industries	3
	Econotours: visiting regular companies as a tourism product (e.g. Waasland port)		