



International Marketing Strategy

Flanders-Brussels → 2012-2015



Taking a fresh start together



Promoting Flanders as a brand is a choice. It is also a challenge.

No marketing without challenges. No strategy without choices.

This new strategy is the result of the principles which have shaped the changes within the organisation of Tourism Flanders. We want to meet society's higher demands concerning service, speed and cooperation. The marketing strategy for the international markets we introduce here, will be executed and carried by our entire organisation.

This new strategy starts from the visitor, rather than the destination. Although we continuously need to invest in our destination, potential visitors just won't respond if we don't relate to them. Tourism Flanders consists of a network of partners and employees which are able to translate their knowledge on international visitors into appropriate actions both at home and abroad.

The new international marketing strategy came about thanks to a whole new approach. We invested in a new platform, starting with a survey and ending with integrating the feedback we received from the entire tourist sector. Let this be the start of a new tradition of dialogue with both the tourist sector and international visitors.

In 2010, six million international tourists and businessmen visited Flanders. This figure topped the result from 2006 with three percent and resulted in a market share of 2,14% compared to our main European competitors. With our new strategy for the international markets we want to do even better.

Improved quality in our international marketing strategy for Flanders?
Shall we leap forward together?



Focus on Flanders

2012 is a turning point for Tourism Flanders. This new marketing strategy for the international markets is the perfect example. From now on, we want to adapt to the recommendation marketing anno 2011: our return on investment will be acquired more and more indirectly. Apart from a growth in arrivals, overnight stays and tourist expenditure (financial capital), we also aim at an increase of reputation and visibility (symbolic capital). Furthermore, we want to emphasise Flanders as an high-quality society which cares greatly for accessibility and participation (social capital).

This turning point also focuses entirely on Flanders as a destination. Together with all our partners of the Flemish Government, we use a common brand strategy. That way we will consistently promote Flanders as an international top destination.

We want to achieve this goal by using smart endorsed branding. Instead of the old-fashioned method of convincing people, we recommend our destination based on people's needs and expectations. This is accomplished by designing specific choices for specific markets, destinations and experiences. We communicate via different media channels with a clear shift towards social media and personal contacts, both in the leisure market and in the rising meeting industry. We do not operate alone, of course, but cooperate with both public and private partners.

Strategic storylines

Flanders becomes a story

The visitor is the central focal point in all marketing phases. We listen to his needs, enter in dialogue and ultimately let him become the storyteller of Flanders. The focus is on warm, authentic stories which differ depending on the target market.



Flanders is a reputation

Together with our public and private partners, we promote the brand Flanders univocally and coherently as 'cutting edge craftsmanship'. Smart endorsed branding and long-term investments in our symbolic capital improve the reputation of Flanders abroad.



Flanders is a place to come to

We strive for a maximal return on our marketing actions for Flanders. We try to find the perfect combination between destinations and tourist experiences for every target market (DxE market combinations). Short holidays (up to 4 nights) are our primary focus on the leisure market. We proactively anticipate new opportunities and changing market conditions.



Flanders is a place to meet

The meeting industry plays a key role in Flanders and will gain a wider scope. A good price/quality relationship, new infrastructure, sustainable accessibility and our leisure assets all contribute to Flanders-Brussels Convention Bureau's unique positioning.



Flanders is a place to be

Tourism Flanders is committed to increase customer satisfaction. We will further develop Flanders as an international tourist destination in line with our strategic choices. By stimulating repeat visits we are determined to transform Flanders into a true lovemark.



Storytelling

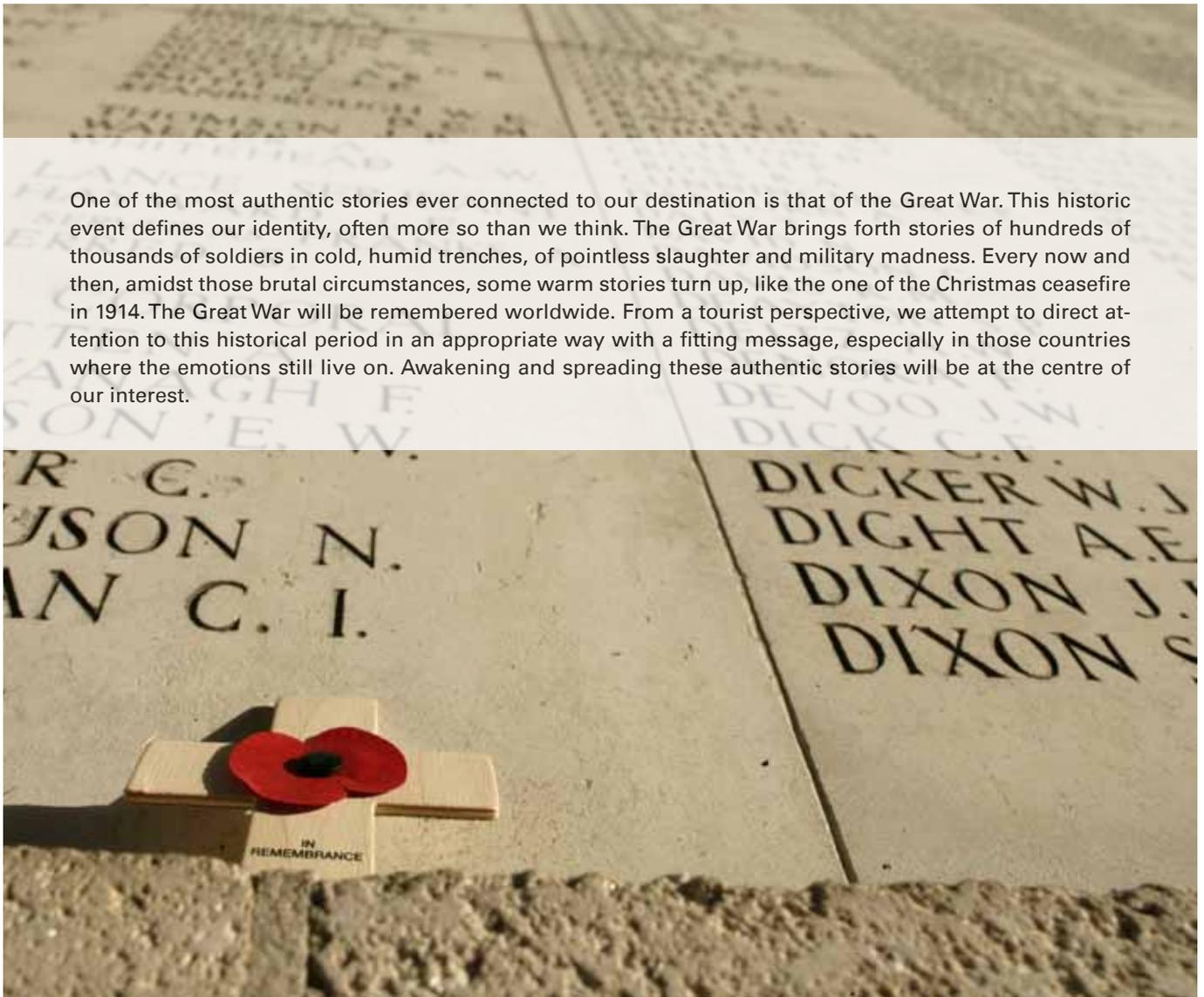
We live in an expectation economy which generates consumers who think and act along, especially with regard to the choice of their travel destination.

Nowadays, consumers take the lead in recommendation marketing. Therefore, Flanders wants to get praise rather than sing its own praises. So, instead of hard selling, the goal is to distinguish our destination and invest in a unique positioning. For that reason, we let others tell warm and authentic stories about Flanders and its inhabitants. Instead of making promises we can't keep, we stimulate words and images which steer expectations we are able to fulfil.

These warm and authentic stories should be present in every phase of the travel experience: during the moment of inspiration, when

gathering information, planning, booking, on the road, after arrival and even later on when tourists share their experiences. Our goal is to build up a reputation, stimulate repeat visits and get good references.

So let us tell these stories together: the passionate Flemish people along with tourists, enthusiasts and professionals. Tourism Flanders aspires a similar overall marketing quality, based on the same level of cutting edge craftsmanship.



One of the most authentic stories ever connected to our destination is that of the Great War. This historic event defines our identity, often more so than we think. The Great War brings forth stories of hundreds of thousands of soldiers in cold, humid trenches, of pointless slaughter and military madness. Every now and then, amidst those brutal circumstances, some warm stories turn up, like the one of the Christmas ceasefire in 1914. The Great War will be remembered worldwide. From a tourist perspective, we attempt to direct attention to this historical period in an appropriate way with a fitting message, especially in those countries where the emotions still live on. Awakening and spreading these authentic stories will be at the centre of our interest.



Flanders and its cutting edge craftsmanship

Flemish people are characterized by a hands-on mentality, self-will, durability, know-how and modesty. Flanders is the story of creative people, driven by knowledge and skills. It's all about passionate, decisive people who practise their trade with a sense of devotion and an excellent eye for detail. People who break new ground in their domain and belong to the international top. People from the past, the present and the future.

Flanders' DNA can be defined as cutting edge craftsmanship which will be the future trademark for all our international promotion.

We will promote this brand story univocally and coherently with all public and private partners. Therefore, we emphasise experiences which reinforce the essence of our brand. The brand story fully entails tourist products which we develop and disclose in our cities, regions and coastal area. We opt for smart endorsed branding by always using the same brand positioning in combination with strong local brands for specific markets: this can be a well-known product, a city, a region or even the whole of Europe. We appoint a brand manager who will keep a close watch on our brand positioning for every marketing action.

FLANDERS as endorsing brand

Brand values:

hands-on mentality, self-will, durability, know-how and modesty

Brand essence:

cutting edge craftsmanship



Brand positioning

Experience Flanders' cutting edge craftsmanship



Endorsed products

Tourist experiences in cities, regions and coastal area



Message



Cutting edge craftsmanship



We actively look for stories which emphasise Flanders' cutting edge craftsmanship. We combine these stories into tourist experiences and carefully select the right products and destinations for every target market (DxE market combinations).

The next four years, we will focus on the products which underline our cutting edge craftsmanship on all target markets: our rich gastronomy, cultural heritage, fashion and our love for cycling. We incorpo-

rate this trademark in both our product development and international promotion.

In addition to this, some destinations also excel in their own specific crafts: Antwerp with its diamonds, Brussels has its comics, Bruges is world-renowned for its lace, ... All these products will be promoted as cutting edge in specific target markets.



Sustainable growth

In 2010, Flanders welcomed six million incoming visitors. Two thirds of them came here on holiday, one third travelled to Flanders on business. Our destination thus obtained a market share of 2.14% compared to our most important competitors*. In total, recreational tourists spent nine million nights in Flanders. With a growth of one million arrivals we want to achieve a volume of seven million international incoming tourists and obtain a market share of 2.2%, surpassing the independent prognosis with 0.15 percent point (Source: Tourism Decision Metrics, Oxford Economics).

From an economic point of view, tourist expenditure is crucial. We aim to retain the same amount of tourist expenditure between now and 2015.

We also strive for a significant increase of customer satisfaction compared to 2011 as reference point. The way tourists evaluate Flanders is the most important indicator of our destination's quality.

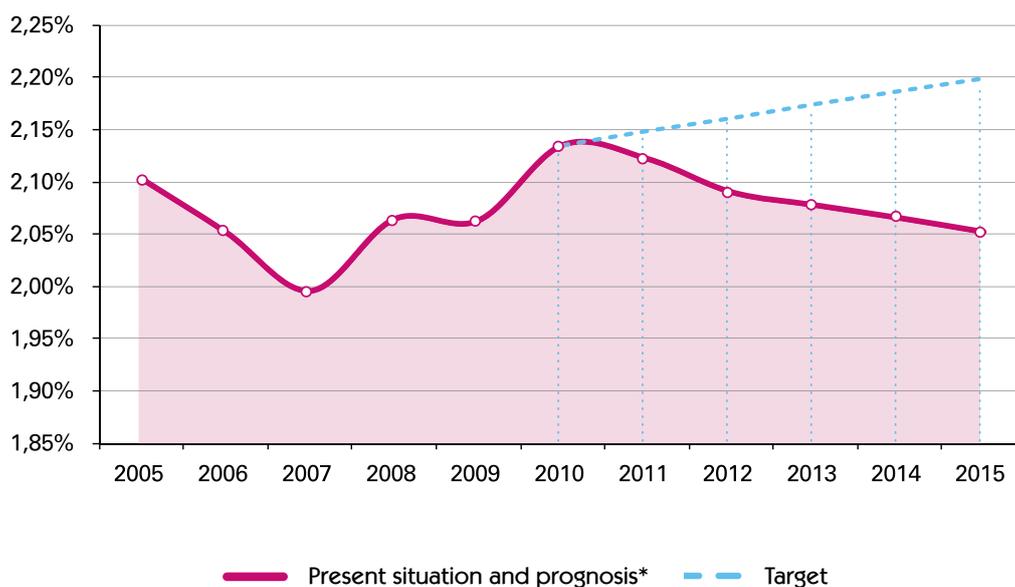
Finally, we also want to improve Flanders' reputation with this international marketing strategy. By 2015, we aim to score higher in reputation indexes and be more likely associated with cutting edge craftsmanship.

In order to measure our progress for these four targets, we will expand our monitoring system and make use of new methods which allow for international benchmarking.

* Based on all international arrivals, including meeting tourism

Evolution market share of foreign arrivals in Flanders compared to the main competitors*, prognosis from 2011 onwards

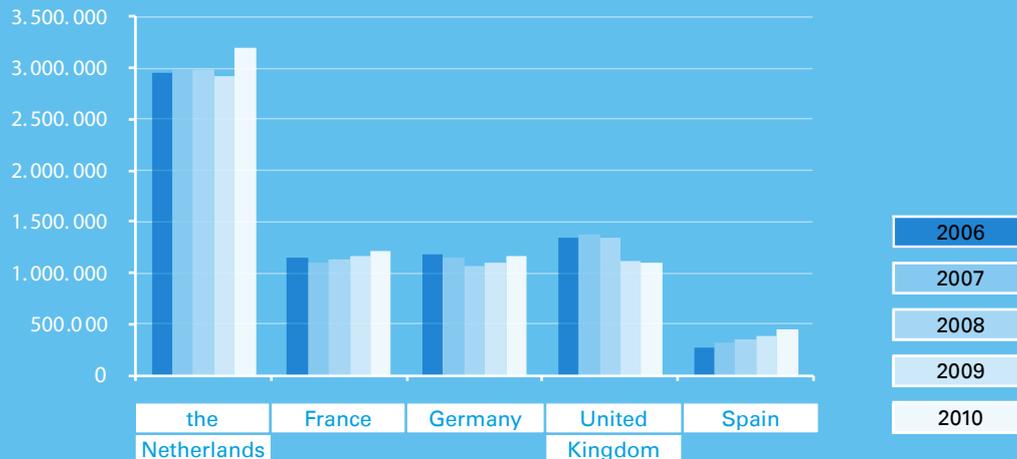
(source: TDM)



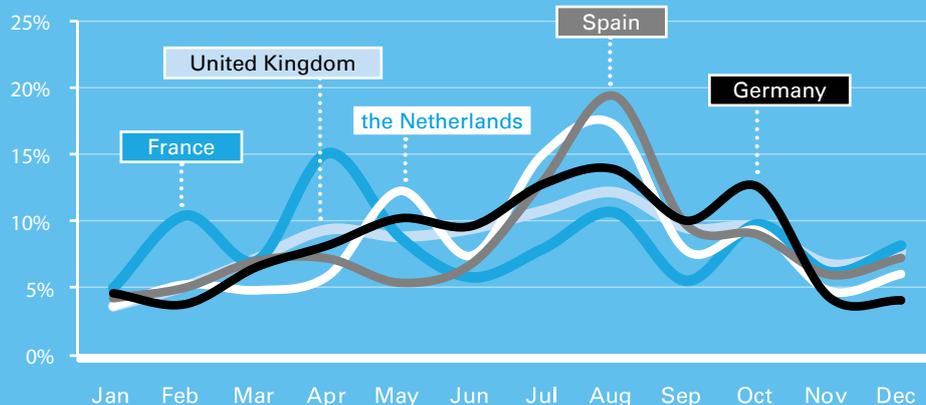
* competing countries: the Netherlands, Luxembourg, France, Germany, United Kingdom, Ireland, Austria, Czech Republic, Switzerland, Italy and Spain

Primary leisure markets

Evolution overnight stays (leisure market) for primary markets 2006 - 2010



Seasonal spread overnight stays (leisure market) for primary markets 2010 in %



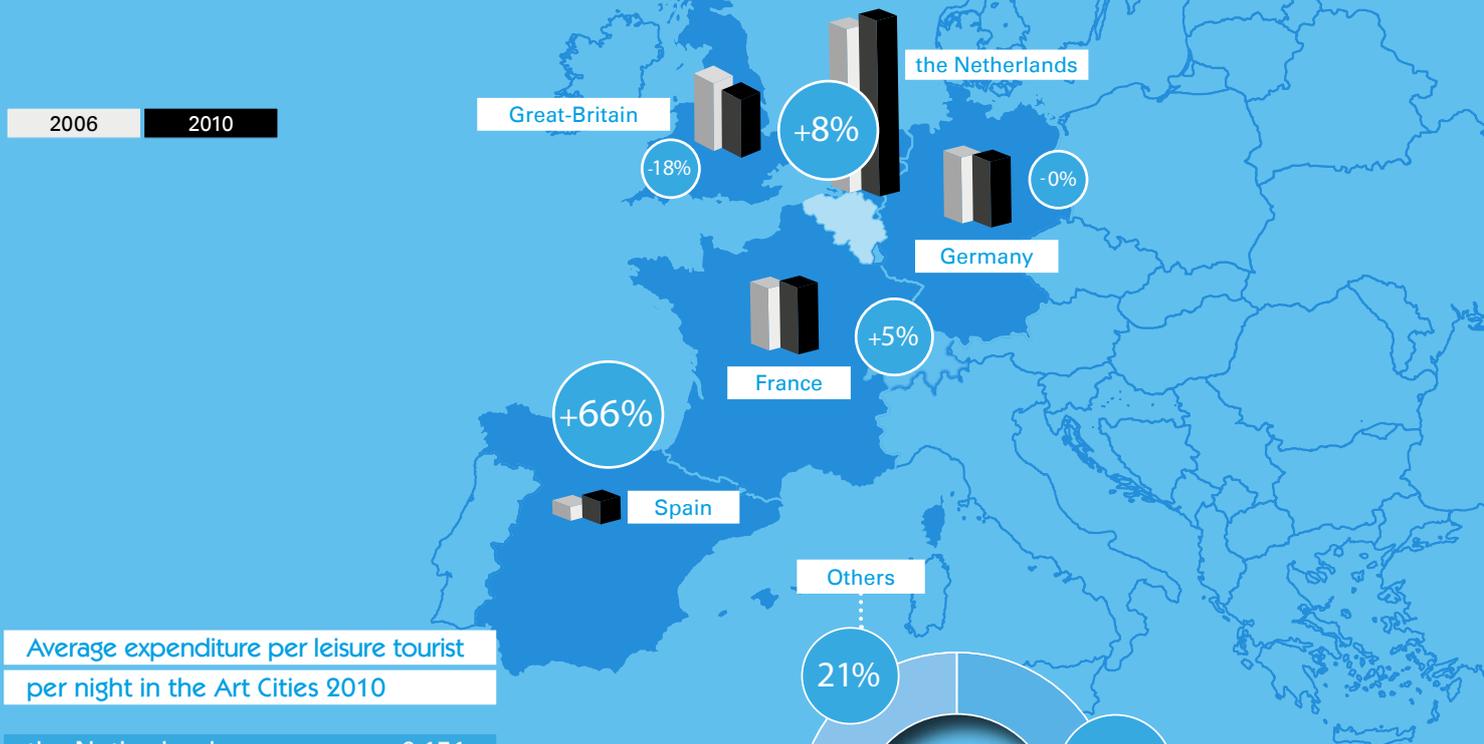
Consolidation of primary leisure markets

Destinations

- Brussels
- Bruges, Antwerp, Ghent
- Leuven, Mechelen
- Coastal area (neighbouring countries, especially the Netherlands and Germany)
- Specific regions (especially in the Netherlands)
- Specific DxE combinations for every target market

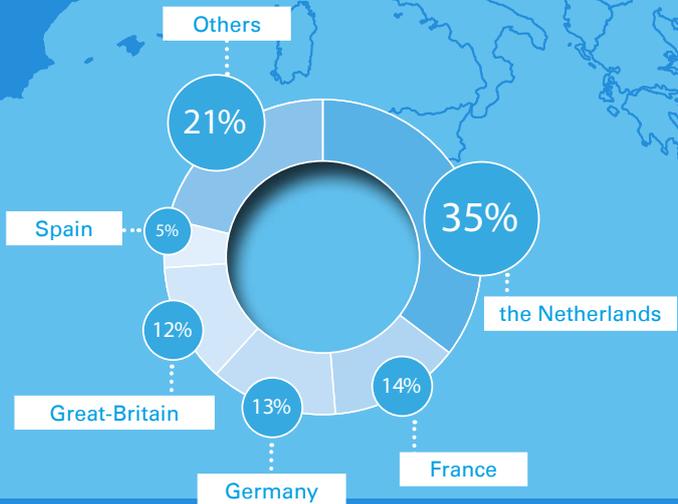


Situation and growth overnight stays (leisure market) of visitors from primary markets 2006 - 2010



Average expenditure per leisure tourist per night in the Art Cities 2010

the Netherlands	€ 151
Germany	€ 113
France	€ 134
United Kingdom	€ 151
Spain	€ 162



Market share primary markets compared to all overnight stays (leisure market) in Flanders 2010

- Target groups**
- Status lovers
 - Enjoyment seekers
 - Fun seekers
 - Explorers

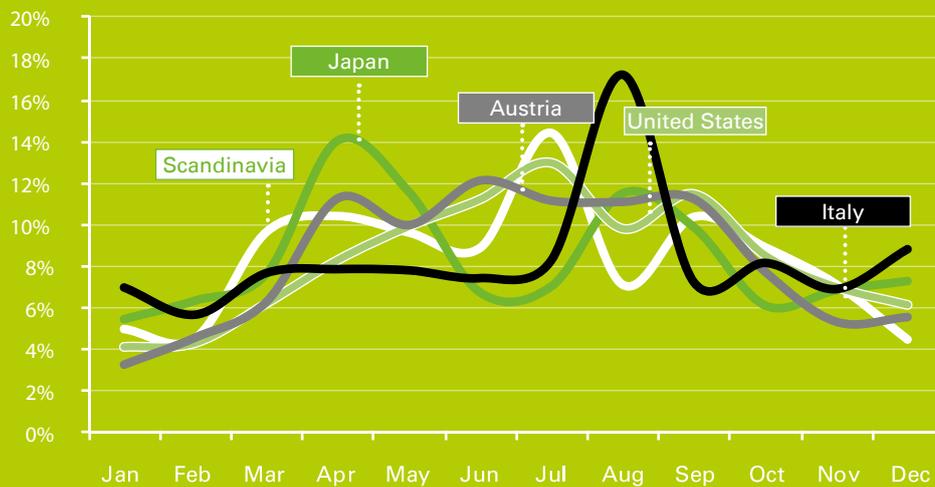
- Strategy**
- B2B → press & trade
 - B2C → consumer actions
 - C2C → social networks

Secondary leisure markets

Evolution overnight stays (leisure market) for secondary markets 2006 - 2010



Seasonal spread overnight stays (leisure market) for secondary markets 2010 in %



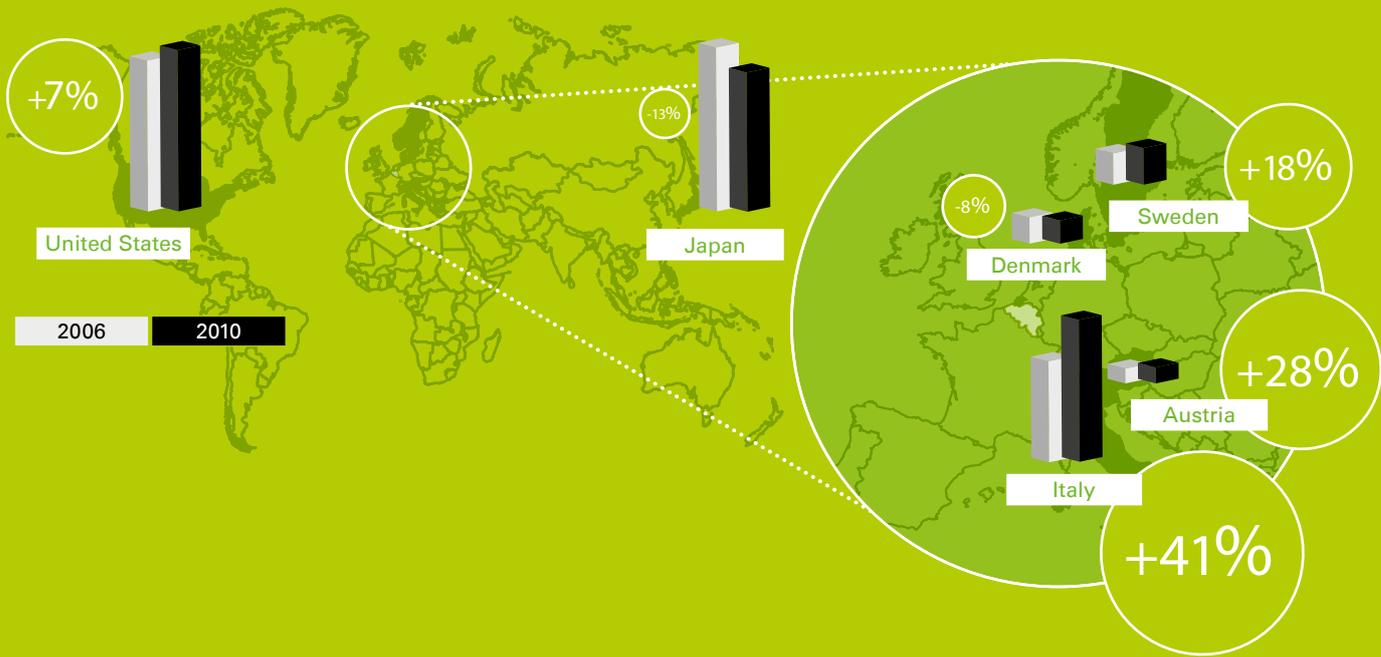
Growth in secondary leisure markets

Destinations

- Brussels
- Bruges, Antwerp, Ghent
- Mechelen, Leuven
- Specific DxE combinations for every target market



Situation and growth overnight stays (leisure market) of visitors from secondary markets 2006 - 2010



Average expenditure per leisure tourist per night in the Art Cities 2010

Japan	€ 138
United States	€ 177
Italy	€ 101
Scandinavia (Sweden + Denmark)	€ 120

Target groups

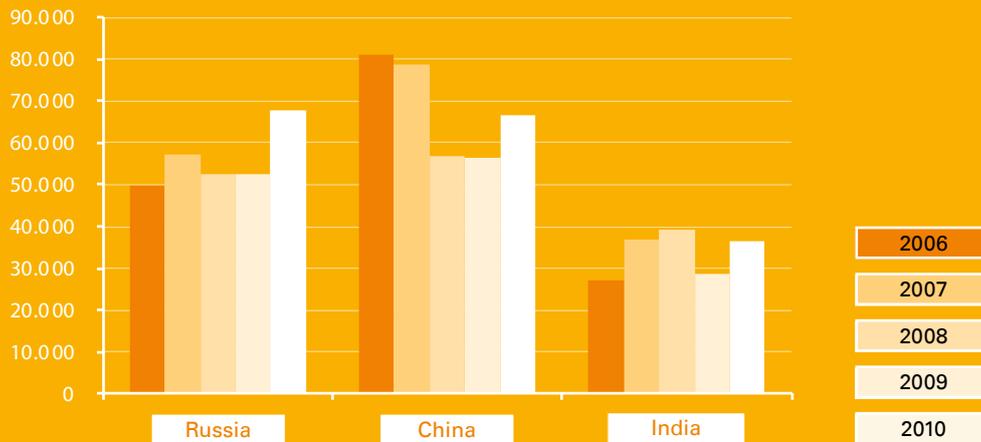
- Status lovers
- Enjoyment seeker
- Explorers

Strategy

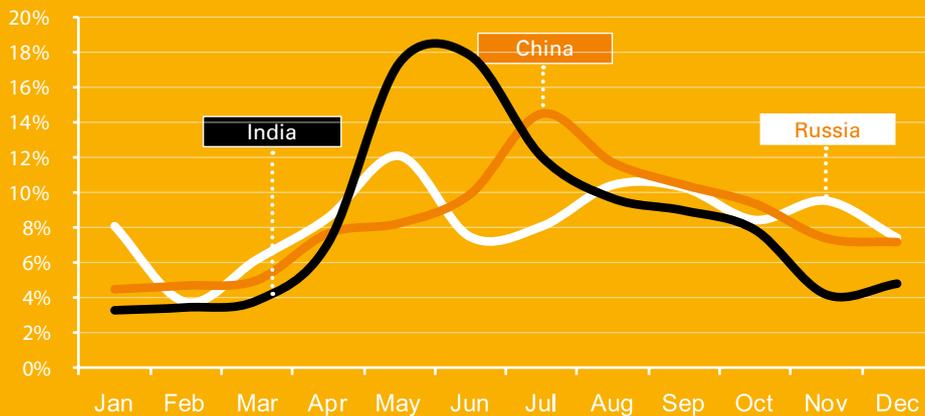
- B2B: press & trade
- C2C: social networks

Emerging leisure markets

Evolution overnight stays (leisure market) for emerging markets 2006 - 2010



Seasonal spread overnight stays (leisure market) for emerging markets 2010 in %



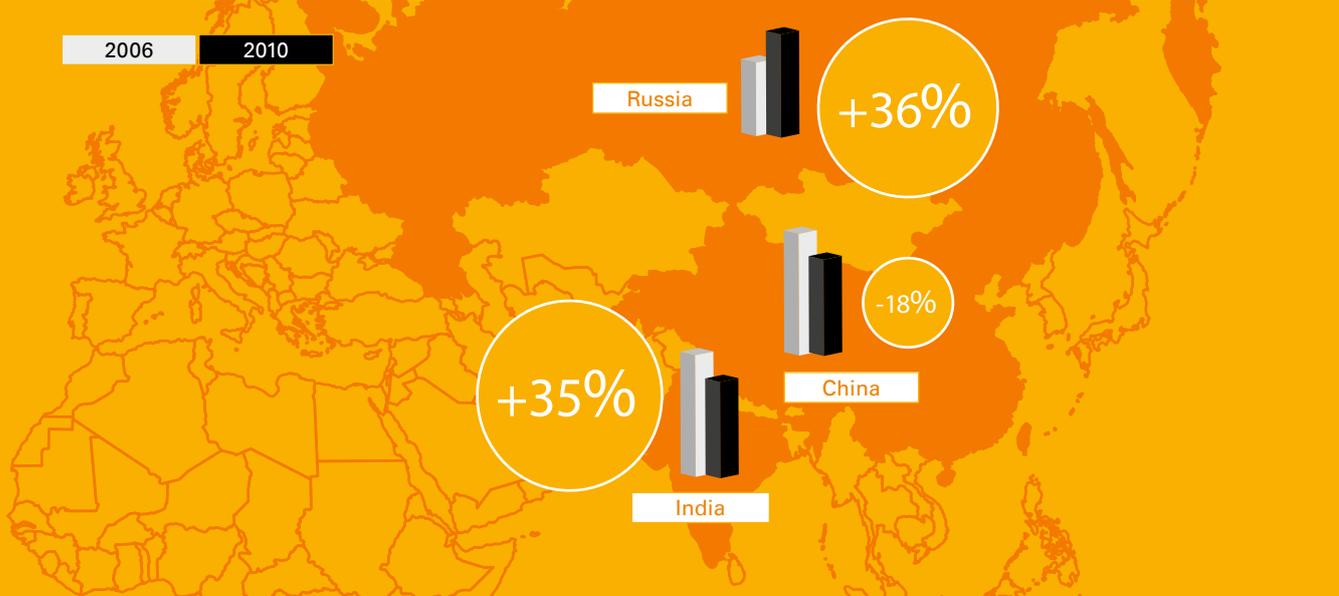
Market development in emerging leisure markets

Destinations

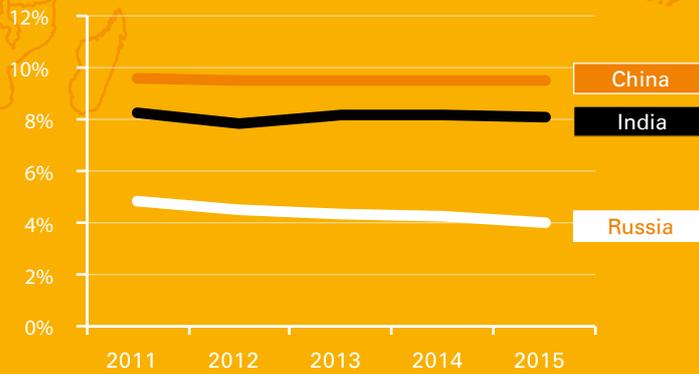
- Brussels
- Bruges, Antwerp, Ghent
- Specific DxE combinations for every target market



Situation and growth overnight stays (leisure market) of visitors from emerging markets 2006 - 2010



Prognosis economic growth 2011-2015 (source: IMF)



Target groups

- Status lovers
- Enjoyment seekers
- Explorers

Strategy

- B2B: press & trade
- Strategic alliances

Strategy for the leisure market

B2B

An intense use of media has to generate a maximum of free publicity. Press trips, personal contact with the media and print communication are amongst the most important tools.

Tour operators, incomings and other travel professionals (trade) remain an important target group in order to promote our destination abroad. We want to be more visible on the biggest trade fairs (WTM in London and ITB in Berlin) to reach these professionals. For emerging target markets, trade fairs remain an important introduction to Flanders. We provide training sessions for partners who want to attend these fairs. We organise workshops and familiarisation trips both at home and abroad to introduce professionals to our destination. We develop joint promotions to market our specific assets and communicate all these actions to our partners.

B2C

On the primary markets, we enjoy or aim to enjoy a good reputation as a tourist destination and undertake specific actions towards consumers. To that end, we organise campaigns and joint promotions with media partners and continuously communicate with the consumers through print, websites, newsletters and other media channels.

C2C

Nowadays, a consumer values the opinion of his peers to a greater extent than that of an official or commercial source. Therefore, we encourage visitors to share information (via e.g. Twitter and Facebook), we stimulate dialogue about our destination and listen to what is being said. On our portal site, we integrate as many online platforms as possible which enable tourists to share personal holiday experiences: TripAdvisor for comments and reviews, Tripline for itineraries, Flickr for pictures, YouTube for video images, etc. We constantly monitor the evolutions of social media, respond to new opportunities and keep into account market-specific media (such as Hyves in Holland).

Strategic alliances

Especially for the emerging markets, we look for alliances with strategic partners such as airlines or the national/regional tourist organisations in our neighbouring countries. On these markets, it is also advisable to have a broader perspective and make use of our destination's European context. The marketing activities of ETC or other European organisations who promote the national tourist organisations' interests also play an important role in these emerging markets.

Internet: a key aspect in our communications mix

Internet is no substitute for all other communication channels but it sure is essential to our target markets. We even leave our digital traces in countries beyond our marketing scope.

The portal site www.visitflanders.com is our worldwide business card. Our online marketing activities focus for 50% on our own website and for 50% on other online platforms.

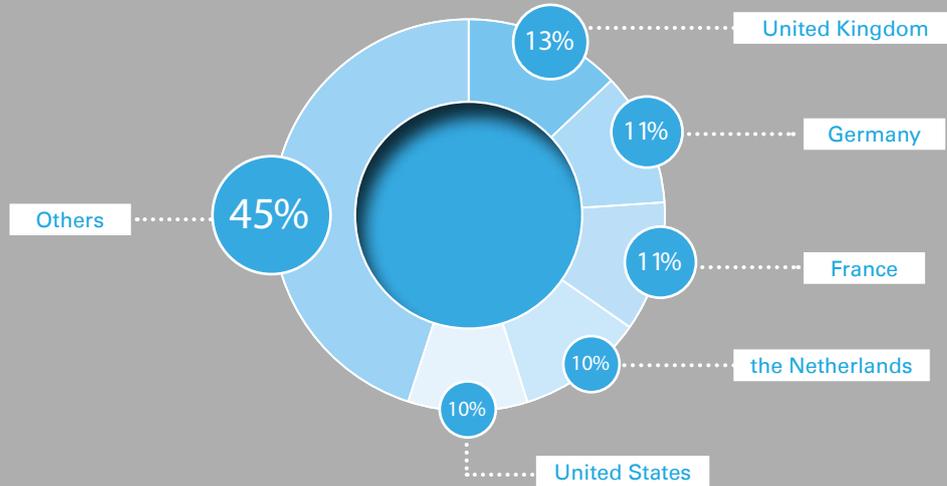
The main target of our online marketing activities is to increase customer contact and improve tourist experience during all the different phases:

- During the **inspiration** phase the potential visitor receives an overwhelming amount of travel impulses and messages. We have to increase our number of impulses in order to make Flanders more top-of-mind and, similarly, a more obvious travel destination.
- Tourists tend to **share** ideas and tips about travel destinations. Holiday destinations are also frequently the main subject on video and picture sites. We make sure Flanders is adequately represented on the most frequently used travel sites, search engines, wikipedia, ... We set up well-chosen strategic partnerships to achieve this goal.
- In the **research** phase travellers gather all the information they can find about Flanders. It is our task to provide easy-to-find information and provide the right answers at the right time and place.
- To help our visitors **plan** their holiday, our portal site features advanced search engines and enables everyone to print a personal guide or to download information on mobile phone.
- Tourism Flanders supports travel and accommodation **bookings** by guiding the visitors on the website. The actual bookings take place on the partner's or provider's website.
- Even when visitors are **on the road to** Flanders, we want to continue to rouse their interest in our destination and products.
- Once the visitors have arrived in **Flanders**, they not only need a physical, but also a digital welcome. Mobile applications, websites, augmented reality and location-based social networks are important applications. We will expand the use of these platforms and continue to strive for maximal visibility on these digital media.
- Finally, we also urge visitors to **share** their experiences and inspire other tourists through social networks.



MICE markets

Share MICE markets compared to all incoming overnight stays (MICE market) in Flanders 2010



Top 5 congress cities worldwide with regard to association congresses in 2010

Cities	number of congresses*
Singapore	725
Brussels	486
Paris	394
Vienna	257
Seoul	201

* International meetings with a minimum of 50 participants and/or which are held during minimally 3 days (source UIA)

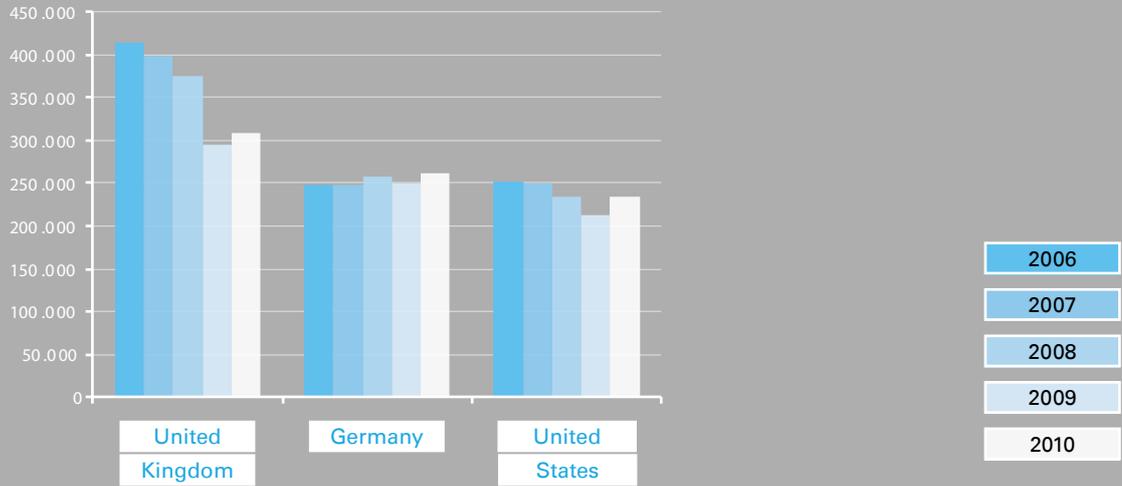
Growth in United States, United Kingdom and Germany

Destinations

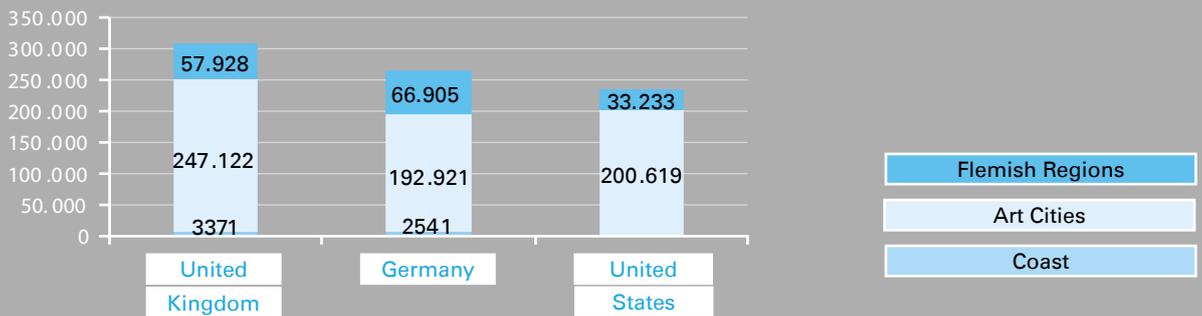
- Brussels, Antwerp
- Ghent, Bruges



Share overnight stays (MICE market) according to motive on the rising markets 2010



Share overnight stays (MICE markets) according to macrodestination 2010



Target groups

- Worldwide associations
- Companies
- Agencies

Strategy

- B2B with emphasis on personal contacts and networking



Strategy for the MICE market

Personal contact and networking are both extremely important for the meeting industry. Therefore, our events are often tailor-made. We maintain our regular communication efforts via print, websites and newsletters and will invest in instruments which focus on personal contact with our target groups :

- ▶ fairs with a lot of meeting planners and organisers (professional congress organisers, destination management companies, ...)
- ▶ be a member of expert associations and engage in networking activities
- ▶ familiarisation trips and site inspections which give meeting planners the opportunity to get to know our destination and the various potential meeting locations
- ▶ maximally emphasise our leisure assets

Improve customer satisfaction and repeat visits

Loyal customers guarantee a secure level of revenue and brand stability. They contribute to our destination's symbolic capital. Moreover, loyal customers are essential in order to realise the long-term intentions of this marketing strategy: gain more symbolic and economic capital.

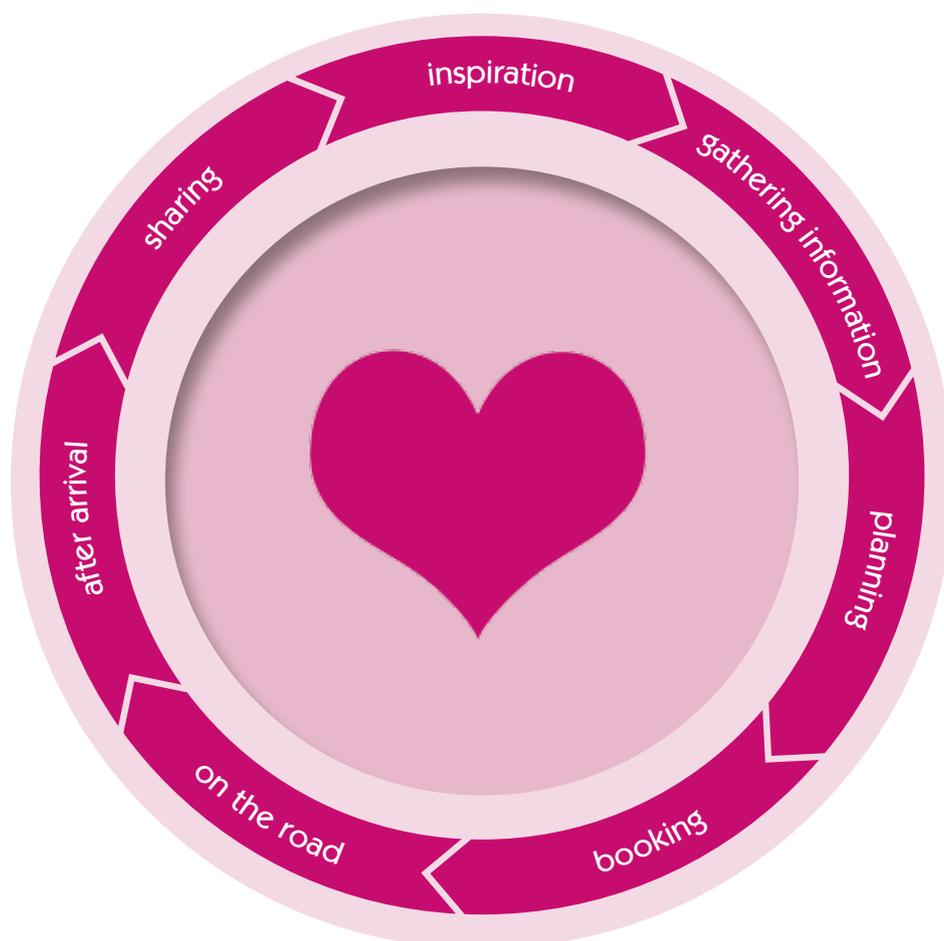
In order to enjoy customer loyalty, we need satisfied customers. This is only possible if we fulfil all the promises we made. That is why we continue to stimulate innovation and invest in destination development. Tailor-made product development will become a key feature in our organisation.

We will co-direct international top events which emphasise our identity and positioning. These events raise a lot of awareness and visibility for our destination. At the same time, they are the main reason for repeat visits.

We continue to invest in a hospitable welcome and disclose even more tourist products and experiences. Personal contacts make up for a large part of tourist experiences. That is why we want all employees within the tourist sector to become local ambassadors.

We need to encourage tourists to broaden their scope and discover other cities in Flanders. Therefore, we fully engage in an efficient and effective referral marketing in order to increase expenditures and repeat visits.

We aim to offer tourists an overwhelming experience during every phase of their journey. This is how we want to transform Flanders into a true lovemark.



Visit Tourism Flanders to visit Flanders

Our marketing strategy for international markets is translated into specific actions by an entire team, both at home and abroad. Do not hesitate to contact us if you have any questions or need any advice:

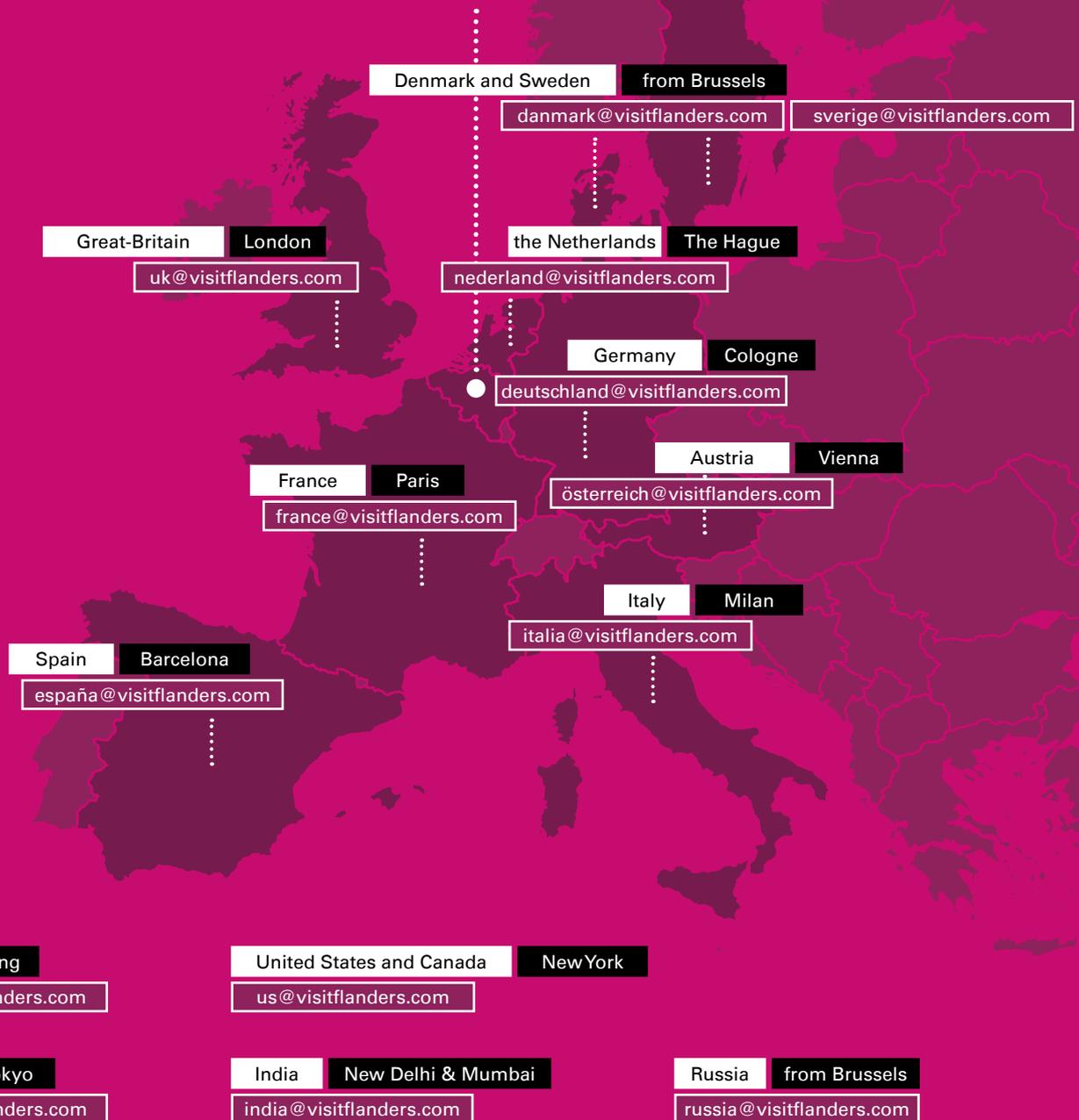
Brussels

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about our brand story:
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Our foreign representatives frequently visit Brussels. Contact us for more information via 0032 (0) 2 504 03 00 or communicatie@toerismevlaanderen.be

If you want to collaborate, do not hesitate to contact us. We will gladly inform you about the possibilities.



Colophon

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