CALYPSO STUDY ON
SOCIAL TOURISM
BELGIUM
**CONTENTS**

1. **Summary**  
2. **Focus on experiences and mechanisms for international exchanges**  
3. **Analysis of the four target tourism markets**  
   3.1 Structures and players  
   3.1.1 Representative organisations of the target groups  
   3.1.2 Tour operators and other representative organisations  
   3.2 Segmentation profile  
   3.3 Existing support systems and/or mechanisms  
   3.4 Demand drivers  
4. **Analysis of the tourism sector**  
   4.1 Market trends  
   4.2 Supply of services  
   4.3 Supply of services from a European point of view  
   4.4 Sustainable tourism aspects  
   4.5 Feasibility of social tourism  
5. **Legislative perspectives**  
6. **Development of products for social tourism**  
7. **Web portals**  

**Annexes**  
List of interviewees  
List of documents  
Good practice descriptions
1. SUMMARY

Belgium is one of the first countries in which social tourism has been developed. At the introduction of the mandatory annual holiday in Belgium in 1936, a number of initiatives were created to enable workers to take part in holidays. Holiday centres were founded by Trade Unions and the National Health Services to make holidays possible for these workers and their families (see 4.1.).

The first holiday experience often involved group travelling, initially in holiday camps at the seaside and later in the 1960’s abroad, in Switzerland or Austria for instance.

In the 1960’s-70’s the holiday centres and organisations went through a considerable expansion and the focus shifted from group holidays to individual and family holidays. From the 1980’s onwards, structural support for youth tourism also came into being.

The market trends have been shaped by two main elements:
- Above all by the administrative divisions between the regions of Flanders and Wallonia. This is also why the statistics in this report are usually divided into Walloon and Flemish statistics.
- To a smaller extent by the social organisation of Belgium which is composed of three different pillars: the liberal, the catholic and the socialist pillar.

These divisions influence this present report which tends to focus on the Flanders Region more than on the other Belgian Regions: quantitative and qualitative information on Social Tourism in Flanders was particularly numerous.

Due to the early introduction of social tourism, the supply in this field is relatively broad in Belgium. With respect to Flanders, the region covers the overnight stays in 425 centres for social tourism with a total capacity of 35,621 beds acknowledged by the authorities. This is about 50% of the supply as the commercial sector numbers about 60,000 beds.

The main players in the field of social tourism include both public and private organisations. Private players are limited to regional areas, as there is no national structure. The private players are mainly associations and NGOs. The public social tourism facilities collaborate actively with the private sector. As far as Flanders is concerned, the social tourism actors differ considerably in size, objective and way of working, and not every organisation is able to provide each form of support. The idea that everyone is entitled to a holiday is largely shared, and thus social tourism is accepted among the population as a justified governmental intervention.

With regard to demand drivers, the target groups have developed strong particularities in terms of expectations, constraints and sensibilities to prices and seasonality (see 3.4.). Peak season takes place during the spring, summer, and December’s holidays. The rest of the year is considered as off-season, above all during January and February. Taking into account that the tourism sector in Belgium cannot be characterised as “climate tourism”, seasonality should be linked to weather conditions and also school and professional calendar.

Each target group is assisted by public authorities, providing them with information and financial support. All the target groups benefit from a public support, but the cooperative organisms are not extremely developed.

The private actors (NGOs, associations) are also deeply involved in the promotion of their own support mechanisms. A striking example is provided by the Flemish social tourism facilities, which are unique due to the collaboration with the private sector.
There is a strongly humanitarian awareness present among the attractions, i.e. that everyone has a right to a holiday and recreation. Thus, many attractions are involved in social tourism based on charity considerations. This is the most important motivation for almost 40% of them.

In particular one interesting exchange deserves to be mentioned:

The UK (Family Holiday Association, Belgium and France have together introduced a family exchange programme. Tourism Flanders has cooperated closely with France and the UK in the field of social tourism for families, where, for example, British children have been on holiday in Belgium.
2. **FOCUS ON EXPERIENCES AND MECHANISMS FOR INTERNATIONAL EXCHANGES**

In particular one good practice in the field of social tourism was found in Belgium, also incorporating experiences and mechanisms for international exchanges.

The ‘European Holiday Experience’ project consists of an exchange of holiday participants between France, Flanders & the UK. The destinations are London, Paris, Nord Pas-de-Calais, and the Belgian Coast. The stakeholders involved are the Tourism Office of Flanders (also called “Flanders Tourism”), Family Holiday Association (UK) and Vacances Ouvertes (FR). The Flemish families pay their own accommodation, while Tourism Office of Flanders pays 75% of the transportation costs. This type of an exchange has been in place since 2006, both during off-season and peak-season. 5 to 10 families each year from each country are concerned.

In addition to the above practice, Belgium provides a number of additional interesting examples of social tourism:

The Holiday Participation Centre\(^1\) works for people with a low income. Senior citizens, young people, adults and families can benefit from holiday when they live in a vulnerable situation. For instance, holidays centres give the opportunity to young European interns to benefit from accommodations at an affordable price.

Moreover, the transferability and extension potential of these existing mechanisms to the European level is high, considering that the actions are not based on legal particularities but more on individual initiatives. The mechanisms are rather simple and can be implemented at the European level with few adaptations.

3. **ANALYSIS OF THE FOUR TARGET TOURISM MARKETS**

3.1 **Structures and players**

Due to the division of Belgium into federal states, there are no national level actors involved in the field of tourism. The main actors on the regional level are:

- Tourism Office of Flanders: The Tourism Office of Flanders promotes tourism in and towards Flanders and Brussels in a long-lasting way in order to create more prosperity and well-being.

- Commissariat Général au Tourisme – Wallonie: The General Office of Tourism – Wallonia is the public Walloon organisation in charge of the recognition of relevant actors and the financing of Social Tourism. The Direction of Touristic Attractions and Infrastructure is in charge of Social Tourism.

- Commission communautaire française - Direction de l'administration des Affaires culturelles et du Tourisme: The public organisation of the Region of Brussels promotes Social Tourism and is responsible of the allocation of subsidies.

The above stakeholders are well acquainted with the goals of the Calypso Study, and have a positive view of the study, which materializes the EC interest for Social Tourism. They have a good knowledge of the EC stakes and generally provide a high quality of implication to complete this current study.

\(^1\) Source: http://www.holidayparticipation.be/
Below, examples of other relevant actors in the field of social tourism are presented. This list should however not be considered to be a complete listing of all the Belgian actors in the field, but rather an example of important players.

### 3.1.1 Representative organisations of the target groups

- **Accès et Mobilité pour tous:** this organisation provides services and advice to the cities and the administrations of the Walloon Region and Brussels Capital Region, in order to shape reasonable solutions in the field of private and public places accessibility for the Disabled.

### 3.1.2 Tour operators and other representative organisations

- **AEP – Centre national de services de vacances:** this organisation is composed of four different associations. AEP is the logistic operator which aims to create, support and realize social and educative actions in the field of leisure and holidays - above all for youth and families.

- **Vacances Vivantes:** this organisation is a member of the AEP organisation and provides supervision of youth during holidays as well as training for coordinators.

- **Joie et Vacances -Floréal Club:** this organisation gathers accommodation facilities in Holiday centers, campings, hotels and flats. The services are dedicated to families. The accommodations are spread in all Belgium.

- **Centrum Voor Jeugdtoerisme –CVJ:** this Flemish organisation receives subsidies from the Flemish government to provide accommodation facilities to youth.

These stakeholders are familiar with the Calypso Project above all as a result of the communications actions of the National Contact Points. They show great interest on the project and expect new opportunities for Social tourism in the EU. They do not develop a personal opinion on its content or its objectives.

### 3.2 Segmentation profile

#### Senior citizens

| User profile (socio-economic profile, travel habit demographics) | In Belgium there are 1.8 million persons that are 65 years old or older (18% of the Belgian population). 1.1 million of these live in Flanders (18% of the Flemish population).  

Some facts of 2007 about seniors aged 60 and more:  
- 50% of seniors only went to school until the age of 12.  
- Seniors are happier than young people.  
- The group of divorced seniors doubled in the past 15 years  
- 1 out of 7 seniors go on a holiday five or more times a year  
- 70% of the seniors possess a cell-phone  
- 10% of the seniors do not meet another person in a month  

On 01/01/2008 the average pensions of employees was € 1016 per month, € 726 per month for independents and € 2237.27 per month for civil servants.  

Seniors have specific needs and requirements for transportation, accommodation, services, and activities. These are specified in

---

2 Unless otherwise stated, the information concerning senior citizens in this chapter is based on data from ADS.  
3 On 01/01/2008. Source: ADS.  
4 ADS 2007.  
5 Rijksdienst voor Pensioenen.
chapter 3.4.

In almost 40% of the cases a senior books his transport in advance. 57.8% of senior holidays are undertaken by car. Airplane (26.3%) and touring car are also popular.⁶

Seniors can be considered as a cross target group, also impacting the group of the disabled. In 2007 30% of the senior citizens (> 65) suffered from long-term illnesses or disabilities.

<table>
<thead>
<tr>
<th>Organisation responsible for support</th>
<th>Data not found.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration of stay</td>
<td>In 2008, a senior holiday lasted on an average 7.9 nights.</td>
</tr>
<tr>
<td>Main holiday destinations</td>
<td>In 2008 27.8% of the senior holidays were undertaken in Belgium itself (15% on the Flemish coast and 7.6% in Wallonia). Other popular foreign destinations are: France (23.4%), Spain (8.3%), Germany (7%), Holland (5.1%) and several non-European destinations (5.2%).</td>
</tr>
<tr>
<td>Average spending during holidays per year</td>
<td>In 2008, a senior spent in 56.2% of the cases between 150€ and 750€ when travelling, averaging 582€ per holiday per person. In 56.8% of the cases a senior paid 25-100€ per person per night, averaging 72€ per person per night. In 2008, a senior holiday was undertaken by an average of three persons, with an average of 1.9 people of the same family. Most seniors travel alone (20.5%) or with a partner (71.9%). 13.5% of senior holidays are undertaken in group.</td>
</tr>
<tr>
<td>Holiday participation statistics</td>
<td>In 2008, there were 3.1 million holidays undertaken by seniors.⁷ 61.2% of the people aged between 65 and 74 took a holiday in 2008 and 35.5% of the seniors aged 75 years or above took a holiday in 2008.</td>
</tr>
<tr>
<td>Barriers and reasons for non-participation</td>
<td>No specific barriers were identified.</td>
</tr>
</tbody>
</table>

### Young people

| User profile (socio-economic profile, travel habit demographics) | The group of 15-24 year olds represents 12.1% of the Belgian population⁶. Belgian youth have more temporary jobs than the rest of the population. They are independent from the parental house at 26.7 years old (men) and 25.4 (women)⁹. |

---

⁶ WES, Reisgedrag van de Belgen 2008. In this study seniors are 55 years and older.
⁷ Holidays are all commercial trips outside the home for at least one night, stays in second homes are not included.
⁸ Eurostat: People by age classes; Proportion of population aged 15-24 years.
In Wallonia, 1 out of 25 young people aged 18-25 are dependent on the support provided by the Public Center of Social Action, which represents 12,000 individuals. They stand for one third of the beneficiaries of the right of social integration in Wallonia.

| Organisation responsible for support | Ministère de la Jeunesse de la Communauté Française de Belgique  
Flemish Ministry for Culture, Youth, Sport and Brussels Affairs |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration of stay</td>
<td>Statistics not available</td>
</tr>
<tr>
<td>Main holiday destinations</td>
<td>Statistics not available</td>
</tr>
<tr>
<td>Average spending during holidays per year</td>
<td>Statistics not available</td>
</tr>
<tr>
<td>Holiday participation statistics</td>
<td>Statistics not available</td>
</tr>
<tr>
<td>Barriers and reasons for non-participation</td>
<td>Statistics not available</td>
</tr>
</tbody>
</table>

Families facing difficult circumstances

**User profile (socio-economic profile, travel habit demographics)**

With respect to families facing difficult social circumstances, ‘People on a low income’ is the main target group. This group contains people such as single parents, new migrants, unemployed parents, and people with in poor health conditions.

The Walloon statistics are not available, contrary to the Flemish statistics which are quite numerous.

14.5% of the Flemish people live in a family that cannot afford a week’s holiday away from home. This concerns over 880,000 people. In the lowest income group, this is as high as almost 40%.

Under the 60% poverty threshold, this is 43%. This relative poverty level is 60% of the national median equivalent income.

More than 20% of the elderly people (75 years or older) do not go on holiday for financial reasons. People with lower levels of education (22%), the unemployed (25%) and especially the sick and disabled (36%) are groups that are able to go on holiday less often. The group with the greatest level of exclusion is single-parent families where 50% cannot afford a week’s holiday, compared to 15% of total families with children in Flanders. Among families with children without paid employment, 67% are unable to take a one-week holiday.

The income to which the poverty level is compared includes all the monthly or yearly net income (salary, alimony, dividend, pension, family allowance, rental income etc).

---

11 The annual SILC survey (EU Statistics on Income and Living Conditions, organised by ADSEI, the former Institute for Statistics) has developed figures on the share or percentage of households that are unable to afford a week away from home. The SILC figures concern income quintiles, level of training and work status. These figures are included each year and are similar to other countries and regions in the EU.
12 Interview of the Tourism Office of Flanders
A household consists of one or more people (whether or not related) who are officially domiciled at the same address form a family. The corresponding poverty level is based on the composition of the household and the monthly family income:

Household consists of: Poverty level (based on monthly income)*
- Single: € 878
- 2 family members older than 14: € 1.317
- 2 family members older than 14 + 1 child: € 1.581
- 2 family members older than 14 + 2 children: €1.844
- 2 family members older than 14 + 3 children: €2.108
- 1 family member older than 14 + 1 child: €1.142
- 1 family member older than 14 + 2 children: € 1.405

* Calculation:
  - For every additional family member over 14 years old: + € 439 (half of the monthly threshold for singles)
  - For every additional child (under 14): + € 263 (30% of the monthly threshold for singles)

**Organisation responsible for support**

**Flemish Ministry of Welfare, Public Health and Family, agency "Child and Family"**
- Aligns itself with the requirements and requests of socially vulnerable families, support on raising children, provision of daycare

Ministry of the Walloon region, Directorate General for social action and health, family department
- Responsible for the financial support attached to family policies in the Walloon region

**Centre on Inequality, Poverty, Social Exclusion** and the City, based in Antwerp, publishes every year a yearbook about poverty & social exclusion (no information exists on the Walloon equivalent).

**Holiday participation Centre** (Steunpunt Vakantieparticipatie (SV)) is a governmental organisation that brings a public-private partnership together in Flanders, Belgium. Tourism & poverty comes together in the holiday participation Centre, a service of Tourism Flanders.

The organisation is the central axis in a co-operation between the Flemish government, the local tourism industry and the social sector (represented by social welfare organisations, charities and associations).

SV negotiates reduced tariffs for socially excluded groups with the private partners, and matches the offer of holidays and day trips to suitable holiday makers with the help of the social support organisations. The initiative exists since 2001 and has grown exponentially ever since: in 2007, 51000 holidays and day trips were taken, by people who would otherwise have no opportunity to enjoy a break.

**Duration of stay**
Short week: 5 days

---

| Main holiday destinations | Statistics not available.  
Most people want to go to the seaside. |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average spending during holidays per year</td>
<td>Statistics not available.</td>
</tr>
<tr>
<td>Holiday participation statistics</td>
<td>Statistics not available.</td>
</tr>
</tbody>
</table>
| Barriers and reasons for non-participation | Families with children are connected to school holidays.  
The School calendar is as follows:  
Spring holiday 15/2/2010-21/02/2010 (one week)  
Easter holiday 5/04/2010-18/04/2010 (2 weeks)  
Summer holiday 1/07/2010-31/08/2010 (2 months)  
Autumn 1/11/2010-7/11/2010 (1 week)  
Christmas 27/12/2010- 9/01/2011 (2 weeks) |

<table>
<thead>
<tr>
<th>Adults with disabilities</th>
<th></th>
</tr>
</thead>
</table>
| User profile (socio-economic profile, travel habit demographics) | Vzw Toegankelijkheidsbureau\(^7\) (2007) estimates that 16% of the population (16 – 64 years) suffer from long-term illnesses or disabilities\(^8\).  
18% of the Flemish population is 65 or older (+/- 1.000.000). In 2007, 30% of these senior citizens (> 65) suffered from a long-term illness or disability\(^9\). |
| Organisation responsible for support | No information available |
| Duration of stay | Statistics not available |
| Main holiday destinations | In Belgium: Ardennes, Flemish coast  
Abroad: The Netherlands, France, Germany\(^10\) |
| Average spending during holidays per year | No statistics available |
| Holiday participation statistics | No statistics available |
| Barriers and reasons for non-participation | +/- 30% of the disabled\(^{21}\) need an assistant (luggage, daily activities, excursions...) |

\(^{16}\) Interview of the Tourism Office of Flanders  
\(^{17}\) Zorgvakanties in Vlaanderen. Onderzoek naar de mogelijkheden en beperkingen voor de (verdere) uitbouw van zorgvakanties in Vlaanderen. Vzw Toegankelijkheidsbureau, 2007  
\(^{18}\) Interview of the Tourism Office of Flanders  
\(^{19}\) Interview of the Tourism Office of Flanders  
\(^{21}\) Vzw Toegankelijkheidsbureau, 2007.
3.3 Existing support systems and/or mechanisms

In Belgium, support systems in the field of social tourism are offered by both the public and the private sector. Most of these are applicable to all the four target groups. The public organisations propose services with possible co-financing. These include for example co-financing of the accommodation or of the transportation.

However, it is the private organisations which seem to be the most involved in the development of support mechanisms: NGOs and other types of associations provide a possibility of holiday financing which focus either on transportation or on accommodation.

In addition to the financing mechanisms, the private organisations also provide advice to the target groups. All of them integrate the idea that participants should pay a part of the travel. The reasons are not only economic, but are also believed to give dignity and responsibility to the participants.

For instance, a general service profitable for all the target groups can be evoked. Regarding transportation, everyone on a low income\(^22\) can obtain a service called “Omnio”, which entitles them to a higher refund of medical expenses and a reduction of 50% on public transport tickets (train & De Lijn). According to interviewees, people have to apply through their public medical insurance company\(^23\).

Social organisations are screened according to their ability to reach a specific target group. Examples of these social organisations are Social Services (OCMW), associations that give voice to the poor, neighbourhood centres in underprivileged neighbourhoods, Welzijnsschakels, family guidance services, asylum centres, naturalisation centres etc. All organisations that are members of the Holiday Participation Centre are required to follow training on screening, guidance and the procedures and functioning of the Centre.

There are many organisations interested in the offerings. If their target group is too broad and diverse, they do not receive collective access to the offerings. These organisations with a too wide target group (for example schools) cannot become a member, but can play a role as point of contact\(^24\).

One of the support mechanisms that is offered to the four target groups are the holiday participation centres run by NGOs. Holiday participation centres offer services, such as social activities (sports and games). The criteria for participation are based on financial resources of the participants (only the level of salary is checked, not the patrimonial possessions). People who use the services of the holiday participation centre are in a vulnerable situation. The criteria for participation are:

- Income (below EU poverty level)
- situation of employment (parents are unemployed are in susceptible jobs)
- education (no or low education level)
- living conditions (housing) (poor housing)
- health conditions
- widen perspective/ horizon opportunities (changes children or families have to develop)\(^25\)

---

\(^{22}\) Omnio is dedicated to individuals with an annual salary inferior from 14 776,26€, plus 2 735,85€ per added individual living in the same house.

\(^{23}\) Interview of the Tourism Office of Flanders

\(^{24}\) Interview of the Tourism Office of Flanders

\(^{25}\) Interview of the Tourism Office of Flanders
When three out of six criteria are assessed as ‘poor’, a person is categorised to be living in a vulnerable situation. When two criteria out of six are assessed as poor, the outcome depends on the situation. One criterion out of six is however not considered to be sufficient in order to be categorised as a person belonging to one of the target groups.

### 3.4 Demand drivers

Before looking at the demand drivers of the specific target groups, it is worth investigating the global needs and requirements concerning holiday participation.

The Holiday Participation Centre wants to make regular tourism accessible to everyone. According to the Tourism Office of Flanders, people make their own decisions: “They may prefer to pay for one night in a very luxury hotel or to enjoy more nights in a cheaper accommodation. It’s their own and independent choice. Poor tourists are as diverse as tourists with more money to spend”.

According to Tourism Office of Flanders, the specific barriers experienced by holidaymakers can be placed in different categories:

- The practical organisation of the holiday or day trip, such as issues related to luggage and transport. Most holidaymakers reach their destination via public transport as they do not own a car. Many problems and much uncertainty are generated by efforts such as taking luggage on the train and keeping an eye on the children throughout the entire journey.

- The planning of the holiday. Long-term planning is difficult for holidaymakers belonging to the target groups; they only plan holidays within a short-term period before leaving, as they face an uncertain situation. Holidays, however, must be booked far in advance. Consequently, these people opt for a day trip, since it can be arranged more easily within a short term period.

- The cheapest formulas in holiday offerings are also the ones that are booked up the quickest. It can be a barrier even for people able to come up with money. With the day trips, the cheapest options are often the most popular, and holidays require a much greater financial investment. Coming up with the deposit, for example, can be a barrier.

- Psychological or emotional barriers. Some of the holidaymakers think they do not have the feeling that they deserved a holiday or day trip, such services would then not be meant for them.

It is also worth mentioning that the share of Flemish people who are unable take a holiday for financial reasons decreased from 18% in 2004 to 14.5% in 2006. This applies to most groups, except for the lowest income group, sick people, the disabled and non-EU citizens.

### Senior citizens

<table>
<thead>
<tr>
<th>Constraints</th>
<th>Financial constraints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessibility</td>
<td>disabled equipment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Needs and expectations in terms of destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>A destination with nice nature is the main criteria (31.2%) for selecting a destination. Facilities in terms of transport to make it as comfortable as possible</td>
</tr>
</tbody>
</table>

---

26 Interview with the Tourism Office of Flanders.
27 The annual SILC survey (EU Statistics on Income and Living Conditions, organised by ADSEI, the former Institute for Statistics) has developed figures on the share or percentage of households that are unable to afford a week away from home. The SILC figures concern income quintiles, level of training and work status. These figures are included each year and are similar to other countries and regions in the EU.
28 Interview with the Tourism Office of Flanders.
Types of accommodation
Mainly hotels or holidays centres. 60.3% of seniors stay in a hotel and 18% in an apartment, villa or studio. When staying in a hotel the senior chooses a three- (39.1%) to four- (33%) star hotel. Seniors often choose a half pension formula (39.2%).

Activities
Passive recreation is the main activity of a senior during his holiday (resting and relaxing) and making short walks (29.8%). Besides this there is a mix of all sorts of activities: making long walks (34.8%), biking (11%), visiting attractions (cities and villages 37.9% and natural sites 16.5%), cultural activities as visiting a monument 21% or museum 16.9%, enjoying gastronomy 9.7%.

Specific equipment
A part of seniors are also disabled and should benefit from equipment for disabled.

Sensitivity to price
Important but pondered with criteria of comfort.

Seasonality aspects
High acceptability to go on holiday during off-season. Nevertheless, the preferred travelling time is in April-September (for example in 2008 there was a strong concentration of senior holidays during the months of April to September, with 11% to 15% of the departures). The main reason for this is assessed to be the willingness to travel to a warmer climate. If seniors go on holiday with their grandchildren, they are limited to school holidays and they will travel in-season.  

<table>
<thead>
<tr>
<th>Young people</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constraints</td>
</tr>
<tr>
<td>Needs and expectations in terms of destination</td>
</tr>
<tr>
<td>Types of accommodation</td>
</tr>
<tr>
<td>Activities</td>
</tr>
<tr>
<td>Specific equipment</td>
</tr>
<tr>
<td>Sensitivity to price</td>
</tr>
<tr>
<td>Seasonality aspects</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Families facing difficult social circumstances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Needs and expectations in terms of destination</td>
</tr>
<tr>
<td>Types of accommodation</td>
</tr>
<tr>
<td>Activities</td>
</tr>
<tr>
<td>Specific equipment</td>
</tr>
<tr>
<td>Sensitivity to price</td>
</tr>
</tbody>
</table>

29 Tourism Office of Flanders  
30 Tourism Office of Flanders  
31 Tourism Office of Flanders
### Seasonality aspects

Mostly high season, as parents having children follow the school calendar to book holidays.

### Adults with disabilities

<table>
<thead>
<tr>
<th>Constraint</th>
<th>Fear of the unknown is too great and they hold on tightly to a known structure. They often feel emotionally more at ease in a group, or with supervision.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Needs and expectations in terms of destination</td>
<td>Specific needs in terms of travelling facilities, such as accessibility and services in public space, accommodation and transportation.</td>
</tr>
<tr>
<td>Types of accommodation</td>
<td>Hotels and holiday centres are the most convenient accommodation of disabled.</td>
</tr>
<tr>
<td>Activities</td>
<td>Activities adapted to people in a wheelchair.</td>
</tr>
<tr>
<td>Specific equipment</td>
<td>Disabled equipment should be available in transport, accommodation and public areas.</td>
</tr>
<tr>
<td>Sensitivity to price</td>
<td>Important but depends also on the criteria of comfort</td>
</tr>
<tr>
<td>Seasonality aspects</td>
<td>Acceptability to go on holiday off-season.</td>
</tr>
</tbody>
</table>

### 4. ANALYSIS OF THE TOURISM SECTOR

#### 4.1 Market trends

Belgium is one of the first countries in which social tourism has been developed. At the introduction of the mandatory annual holiday in Belgium in 1936, a number of initiatives were created to enable workers to participate in holidays. Holiday centres were founded by Trade Unions and the National Health Services to make holidays possible for these workers and their families[^33].

The first holiday experience often involved group travelling, initially in holiday camps at the seaside and later in the 60's abroad, in Switzerland or Austria for instance.

In the 1960's-70's these centres and organisations went through a considerable expansion and the focus shifted from group holidays towards individual and family holidays. From the 1980's onwards, structural support for youth tourism also came into being.[^34]

The market trends have been shaped by two main elements:
- Above all by the administrative divisions between the regions of Flanders and Wallonia.
- To a smaller extent, by the social organisation of Belgium which is composed of three different pillars: liberal, catholic and socialist ones.

However, the social tourism market has cross-cultural and cross-regional needs. It can thus be expected that the above divisions, complex from an external point of view, are not an accelerating tool to develop European exchanges within Belgium.

The current economic situation is sufficiently bad to increase poverty. The demand side is growing in number and this trend is expected to continue at least during a middle term period while poverty and unemployment keep growing due to the economic downturn. This phenomenon mainly impacts the families with low income and youth through youth unemployment.

Demographically the target group of seniors will continue to grow. This aging population will have an important influence on travel trends. The interviewees estimate that there will be a bigger

[^33]: Tourism Office of Flanders
[^34]: Tourism Office of Flanders
demand for holidays with ‘care related services’. For example a stay in a hotel where 24h care and medical service is available is expected to become all the more popular in the future.

Youth and the disabled are less influenced by conjuncture-related events (economic and demographic ones), which make their future evolution steadier and much more connected to policies.

The social tourism demand is expected to grow more rapidly than the offer, considering that the offer generally reacts more than anticipated to the above-mentioned global trends.

### 4.2 Supply of services

The current existing products cover both transportation (airlines, rail and bus companies) and accommodation services, such as hotels and flat renters.

In 2008, 12,430,000 visited Belgium as tourists: 6,972,000 visited Flanders and 2,610,000 visited Wallonia, whereas 2,848,000 visited Brussels Capital. Compared to 2007, the figures represent an increase of 2.6%.

In 2008, there were almost 30 Million overnight stays in Belgium: 16.5 Million in hotel, 2.8 Million in camping, 4.7 Million in holiday centers, and 5.9 Million in group centers (Youth center, etc.). Of these nearly 30 Million overnight stays, 13.6 Million were undertaken by Belgian nationals and 16.3 Million by foreigners. The biggest foreign nationalities were the Dutch (5.2 Million), British (2.1 Million), French (2.1 million), Germans (1.9 Million), Americans (599,000), Spanish (586,000), Italians (472,000), Japanese (192,000) and Chinese (115,000). In 2007, Flanders received 13,725,600 Belgian tourists and 9,578,000 foreign tourists.

The evolution of tourism shows that foreign destinations are preferred by the Belgian tourists. The statistics (where year 2003 has the value 100) show us the evolution until 2007. In 2007, short holidays (1 to 3 overnight stays) reached 107 namely 94.3 in Belgium and 124.8 abroad. Long period holidays (more than 4 overnight stays) reached 102.6, namely 80.3 in Belgium and 109.7 abroad.

Social tourism is particularly developed in Belgium. In Flanders, there are overnight stays in 425 centres for social tourism with a 35,621 beds total capacity acknowledged by the authorities. It stands for 50% of the offer as the commercial sector reaches 60,000 beds.

Accommodation varies from the basic accommodation facilities, such as campsites, to youth hostels or holiday villages offering a considerable degree of activities and services. Youth hostels are at the basic accommodation facilities, and hotels and holiday villages are the more equipped ones. Acknowledgement in social tourism is only possible by meeting the imposed standards of quality, safety, hygiene and organisation. Flanders carries out its policy of tourism support through various action plans.

The ability to meet the requirements of the target groups is strengthened by the Belgian sensibility in favour of social tourism which impacts the legislative process; even though the

---

31 StatBel
32 StatBel
33 Flemish Department of Foreign Affairs;
34 StatBel
35 Sources : Interview of the Tourism Office of Flanders
36 Sources : Interview of the Tourism Office of Flanders
interviewees state that there is still room for improvement with respect to the supply of services available.

4.3 Supply of services from a European point of view

Despite of the fact that social tourism is well developed in Belgium, the supply of services is not actively targeted to the European public: the European public can benefit from accommodation and transportation facilities, above all within exchange programmes. However, it appears that Belgians are the ones who mostly benefit from social tourism.

In the European Union, Belgium is recognised to be a leader in terms of social tourism. Consequently, it is seen as a land of good examples and is an appreciated destination as far as social tourism is concerned.

Supplies exist for all the target groups in terms of advice and financial subsidies. However, it seems that the “youth” is the target group benefiting the most from European exchanges. For instance, youth accommodations are particularly opened to the European youth. Some of the most attractive offers for youth are language trips in summer and ski trips in winter. Moreover, many of the youth centres are interested in developing the tourism industry, including the share of European travellers.

Currently, there is a set of services dedicated to Social Tourism in the EU. The EU is provided by exchanges and international services. However, the European area appears to be not sufficiently used as a ground for social tourism. Its capacities of widening the exchanges are important, above all with EU countries without any common border with Belgium.

Without speaking of the will of the Belgian stakeholders to develop a wider social tourism with the EU, we can mention that one of the main issues to solve is the lack of infrastructure to develop social tourism, more particularly for the disabled. Indeed, Belgium is not attractive for the European disabled. Accommodation equipped for disabled is mostly expensive and cannot be found in the cheaper hotels. General urban facilities (such as easy accesses to public transport, toilets, restaurants...) are too rare in the public area. In addition, there is a Belgian specificity which is not in favour of disabled: the streets in the old touristic centers are often made with cobblestones, which complicates access for wheelchairs.

4.4 Sustainable tourism aspects

No experience promoting responsible behaviour of tourists has been identified.

4.5 Feasibility of social tourism

The main benefits of social tourism for the tourism operators/business are defined as follows:
- Reaching a target group they normally never reach
- Developing ethical entrepreneurship
- Realising human rights (article 24)

Any future investments of the tourism operators/business in social tourism will be definitely influence by their coming perception and acceptation of these benefits.

The lack of profitability is the main barrier which exists for the development of social tourism from the tourism industry's point of view. According to the interviewees, for example the hotels are not interested in improving their accessibility due to the investment costs attached to these improvements and the lack of financial profitability associated with the four target groups.

Youth hostels are mostly interested to develop the tourism industry, including a bigger part of European travellers.
A report on "holiday motivations, barriers & expectations for young mothers & teenage parents" from the Tourism Office of Flanders will be soon available.

5. LEGISLATIVE PERSPECTIVES

Belgium benefits from an existing set of legislation that enables the development of social tourism in the country.

An investigation of "tourism for all"/ social tourism practices operating across the then 15 EU Member States was a further initiative of the 2001 Belgian Presidency.

Belgium also has led the development of social tourism policy and practice. In 2001, government support was underscored through the adoption by the Flemish Government of a social tourism policy called ‘Tourism for All’. The policy seeks to promote tourism in and towards Flanders and Brussels in order to create more prosperity and well-being. The policy seeks to make sufficient financial resources available to ensure that holidays for persons on or under the poverty line are affordable and is funded by the Flemish Government, working with ‘intermediary organisations’ who also collect charity funding. The Government pays up to 75 per cent of the major cost of holidays to those living in poverty.

Since 2003, the region of Flanders disposes of legislation on Tourism for All, setting the terms for acknowledgement and support of tourist centres and social organisations. This new policy aims to support specific groups within the society, which globally fit with the target groups of Calypso:

- Families, senior citizens and socio-cultural groups
- Children & youngsters
- Handicapped people
- People living in poverty

According to interviewees, legislation on accessibility for disabled is not sufficiently developed to optimize social tourism for this target group. Accessibility in accommodation, transportation, and the general accessibility in the streets could be more developed.

No information on the other target groups has been given regarding the legislation in the country and whether it causes any limitations to the development of social tourism services.

6. DEVELOPMENT OF PRODUCTS FOR SOCIAL TOURISM

The development of products for social tourism at the European level could improve the situation of the four target groups and generate a new form of economy, able to mix growth with social care.

The opportunities with respect to developing European exchanges are very high: indeed, social tourism already exists and is well supported by the population. Moreover, supply already exists: accommodation facilities, private and public supports could theoretically be turned into European services. A larger set of supply could potentially generate a bigger demand (for example among youth).

The demand/supply gap is currently not balanced, as the demand side is not completely satisfied with the services offered. Several situations exist:

- Belgium still needs to improve its infrastructure: existing infrastructures generate frustration from the demand side (persons with disability)

---

Bernadette Quinn, Kevin A Griffin, Jane Stacey, Poverty, Social Exclusion and Holidaying : towards developing policy in Ireland, January 2008
Financing on the European level is also a question that needs to be solved: how to open the Belgian social tourism service providers to the European target groups if financing is provided by the Belgian government/federal states?

Recommendations from the stakeholders to develop social tourism are:

- Regarding the senior target group, the group seniors will demographically grow in time. This aging population will have an important influence on travel trends. Estimations have planned a bigger demand for holidays with 'care related services'. For example a stay in a hotel where 24h care and medical service is available.

- According to the Tourism Office of Flanders, good example of exchanges projects and expertise in EU can be found in Youth in action-programme.

### 7. WEB PORTALS

#### Portals of organisation:

**Public organisation:**

- [http://www.visitflanders.com/](http://www.visitflanders.com/) is the official Flanders website providing information for tourists. The website is available in English and it is adapted to the travelling particularities of the main difference nationalities in the world.
- [http://cgt.tourismewallonie.be/](http://cgt.tourismewallonie.be/) is the official Walloon website providing information for tourism. Available only in French.

**Private organisation:**

- [http://www.cjt.be/](http://www.cjt.be/) is a NGO promoting tourism towards Flemish Youth. They receive subsidies from the Ministry of Youth and distribute them to 10 accommodation centers in the framework of a three year contract. Available only in Flemish.
- [http://www.vacancesvivantes.be/](http://www.vacancesvivantes.be/) presents services for youth and children's holidays, including the possibility to book services. Available only in French.
- [http://www.florealclub.be/presents holiday centres and camping sites in Belgium, with the possibility to book them. Available in French, Flemish and English.](http://www.florealclub.be/)
General portal:

- www.holidayparticipation.be – a web portal evoked as a particularly good tool to find information on Social Tourism in Belgium.

This website provides an overview of the history of social tourism together with facts, and it includes information on the Holiday Participation Centre in Belgium and on the organisation. The site is available in English.

The Holiday Participation Center of Tourism Flanders develops holidays offerings for people on a low income by:

- Contributing to social tourism policy
- Searching for tourist partners with a social vision
- Targeted promotion to people on a low income
- Offering training to social and tourism partners
- Mediating for holidays tailored to individual needs
- Organising evaluation, discussion and exchange
- Exploring the international context and making contacts.

http://www.holidayparticipation.be/assets/ibrochure/large.html
More than 1000 social organisations are members of the Centre. Several of the tourism partners extend discounts up to 50%, sometimes even 75% on their normal rates. As far as organised holidays are concerned, 25 associations together organise more than 120 holidays for, among others children, young people, families and single mothers. Concerning group stays, more than 200 group accommodations have an offering for people for low income.
ANNEXES
### LIST OF INTERVIEWEES

<table>
<thead>
<tr>
<th>Name of the interviewee</th>
<th>Position</th>
<th>Organisation</th>
<th>Type of organisation</th>
<th>Interview date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luc Gobin</td>
<td>Manager of the Investment Department of Tourism Office of Flanders</td>
<td>Tourism Office of Flanders</td>
<td>Public organisation</td>
<td>18.01.2010</td>
</tr>
<tr>
<td>Karina Schuddinck</td>
<td>Personal Management Assistant to Luc Gobin</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alain Brohez</td>
<td>Deputy general Commissioner</td>
<td>Commissariat Général au Tourisme _ Wallonie</td>
<td>Public organisation</td>
<td>20.01.2010</td>
</tr>
<tr>
<td>Yves Godin</td>
<td></td>
<td>Joie et Vacances -Floréal Club</td>
<td>Private organisation</td>
<td>26.01.2010</td>
</tr>
<tr>
<td>M. Gerez</td>
<td></td>
<td>Accès et Mobilité pour tous</td>
<td>Private organisation</td>
<td>28.01.2010</td>
</tr>
<tr>
<td>M. Van Decelaere</td>
<td></td>
<td>AEP – Centre national de services de vacances</td>
<td>Private organisation</td>
<td>28.01.2010</td>
</tr>
<tr>
<td>Bernard Dangreau</td>
<td></td>
<td>Vacances Vivantes</td>
<td>Private organisation</td>
<td>28.01.2010</td>
</tr>
<tr>
<td>M. Calistri</td>
<td></td>
<td>Commission communautaire française - Direction de l'administration des Affaires culturelles et du Tourisme</td>
<td>Public organisation</td>
<td>29.01.2010</td>
</tr>
<tr>
<td>M. Vercammen</td>
<td></td>
<td>Centrum Voor Jeugdtoerisme – CVJ</td>
<td>Private organisation</td>
<td>29.01.2010</td>
</tr>
</tbody>
</table>

### LIST OF DOCUMENTS

**Documents:**
- Eurostat: People by age classes; Proportion of population aged 15-24 years.
- Study "Rijksdienst voor Pensioenen” (Tourism Office of Flanders)
- Study "ADS", 2007
- Bernadette Quinn, Kevin A Griffin, Jane Stacey, Poverty, Social Exclusion and Holidaying: towards developing policy in Ireland, January 2008

**Websites:**
### GOOD PRACTICE DESCRIPTIONS

#### The European Holiday Experience

<table>
<thead>
<tr>
<th>Name of the expert conducting research</th>
<th>Xavier Blancher</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td></td>
</tr>
<tr>
<td>Respondents/informants</td>
<td>Tourism Office of Flanders (Luc Gobin, Karina Schuddinck)</td>
</tr>
<tr>
<td>Target group involved:</td>
<td>Families (selection by low income)</td>
</tr>
</tbody>
</table>
| Description of exchange:               | The 'European Holiday Experience' project consists of the travel exchange of families between France, Flanders & the UK. The destinations included in the project are London, Paris, Nord Pas-de-Calais and the Belgian Coast.  
5 to 10 families travel each year from each country. The families are selected on their level of income. The exchange has been in place since 2006.  
Flemish families pay for their own accommodation during the trip, while Tourism Office of Flanders pays 75% of the transportation costs.  
Exchanges take place both during the off-season and the peak-season. |
| Handling of target group needs:        | /               |
| Description of support mechanisms      | The stakeholders involved are Tourism Office of Flanders, Family Holiday Association (the UK) and Vacances Ouvertes (FR). |
| Description of funding mechanisms:     | Tourism Office of Flanders pays 75% of the transportation costs | Flemish families pay for their accommodation | No additional financial support mechanisms are available. |
| Lessons learned                        | No lessons learned have been mentioned.  
However, the report on ‘holiday motivations, barriers & expectations for young mothers & teenage parents’ is a regional study which will analyze the lessons learned. It will be soon available. |