



Flanders  
State of the Art



# MARKET RESEARCH

# The Flemish Masters

VISITFLANDERS





# EXECUTIVE SUMMARY

Flanders is the birthplace of a considerable amount of European art and culture. In the coming years, VisitFlanders will enthusiastically dedicate itself to a 'Flemish Masters' theme. In particular in Rubens, Bruegel and the Flemish Primitives, including Van Eyck. In order to draw up a thorough and well-founded marketing plan for the Flemish Masters theme, it is important to make an estimate of the market potential for this theme.

## Three factors determine the market potential of the Flemish Masters theme:

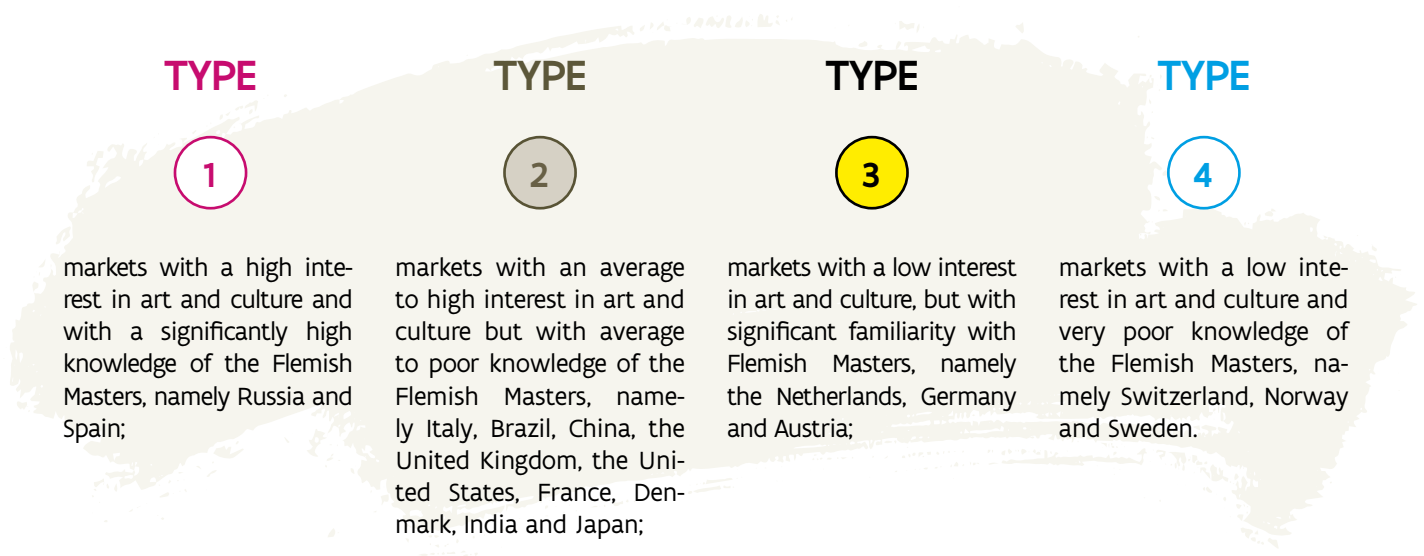
- 1 \ the interest in art and culture when on holiday;
- 2 \ how well known the Flemish Masters are in a particular market;
- 3 \ the size of the market.

An online survey was carried out to measure the first two factors. To do this, a survey was taken in the various markets in which VisitFlanders is present to measure the interest in art and culture and how well known the Flemish Masters (Rubens, Van Eyck and Bruegel) are. This was done by asking various questions, including the type of trips taken in the past three years, important criteria for choosing a travel destination, frequency of visits to museums

and exhibitions abroad, who the most important European and Flemish painters are, etc.

Based on the results of a number of key questions, we determined whether the interest in art and culture in each market was high or low and if the knowledge of the Flemish Masters was good or poor. The results from each market also form the baseline for the project.

## We can divide the various markets into 4 main clusters:



We measured the size of the market using the number of recreational arrivals in commercial accommodations in Flanders.

The four clusters and the size of the markets are the foundation for developing a market-specific approach in the international marketing plan for the Flemish Masters. In general we can say that markets with a high interest in art and culture will also be interested in experiences related to the Flemish Masters. More efforts will be needed to put the Flemish Masters theme at the foreground in the markets in which the Flemish Masters are not well known.

The survey has taught us, among others, that culture is an important criterion when choosing a travel destination. More than a third say this is important to them. Culture can of course be interpreted very broadly. It includes various types of heritage and art as well as the lifestyle elements of a destination. Historic heritage is mainly an important criterion for markets such as France, Italy, Russia and China when choosing a travel destination. Art is not as important a criterion when choosing a travel destination; Italy scores highest (11%).

More than a third of the Russians, Chinese, Americans and Brazilians surveyed visited a museum or exhibition abroad frequently to very often. Quite a few travellers from these countries go on organised holidays in which a visit to a certain museum or exhibition is often included. In almost all countries, history, folklore or archaeology museums are the types of museums visited most

often on holiday. Museums for traditional and fine arts come in at second place. In general, visits to a museum for modern or contemporary arts are less popular.

More than half of the tourists visit specific places or attend events associated with art and culture when on holiday. This applies to all markets except the Netherlands. The majority visit historical buildings and churches/cathedrals. Visiting a museum with an art collection is particularly popular with visitors from Spain, Italy, Russia, Japan, India, China, America and Brazil.

Rubens is the most well-known Flemish Master. In Russia, Germany and Spain more than 10% mention Rubens as one of the 5 most important European painters. In neighbouring countries (excluding the UK), Spain and Italy more than half are familiar with Rubens. In Russia even three out of four are familiar with him. Rubens is clearly less well known in the Scandinavian countries and in the intercontinental markets. Bruegel and Van Eyck are even less well known. Bruegel is the most recognized in the Netherlands, Austria and Russia, while Van Eyck is better known in the Netherlands, Spain and the United States. It comes as no surprise that important works by these masters hang in prestigious museums of those countries. It is striking that Rembrandt is more well known in all markets than any other Flemish Master and that he, together with renowned Dutch painters (Van Gogh, Bosch, Vermeer, etc.) is mentioned in answer to the question: "Who are the three most important painters from Flanders (Belgium)?"

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# INTRODUCTION

Flanders is the birthplace of a considerable amount of European art and culture. Since the Middle Ages, the Flemish Masters have been commanding international acclaim with their craftsmanship, creativity and technical innovations. They spread out all over the world and were excellent ambassadors for Flemish culture at the time. And they still are.

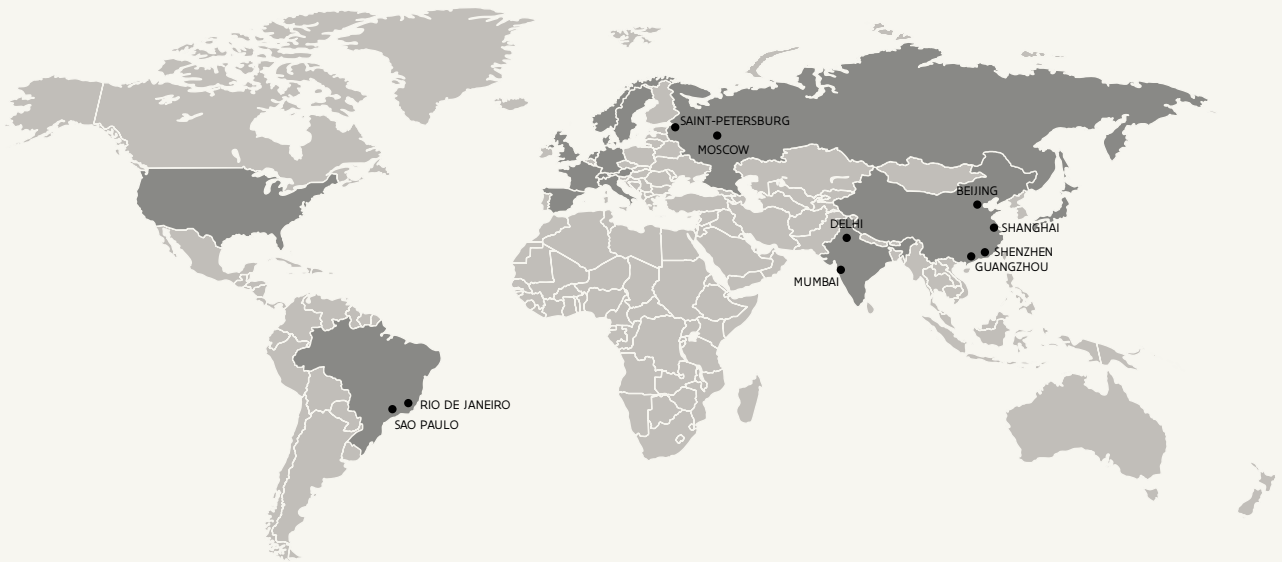
In the coming years, VisitFlander will enthusiastically dedicate itself to a 'Flemish Masters' theme. This theme fits right in with our destination's DNA, distinguishing Flanders from its tourism competitors. Moreover, several unique opportunities will arise in the near future for capitalising on the international fame and reputation of the Flemish Masters. These include the opening of the modernised Royal Museum of Fine Arts, Antwerp (in 2018), the 450th anniversary of the death of Pieter Bruegel the Elder (in 2019) and the restoration of the Ghent Altarpiece (in 2020). The starting point for the Flemish Masters project is paintings and heritage from 15th, 16th and 17th century painters. More specifically, it refers to Rubens, Bruegel and the Flemish Primitives, with Van Eyck being the most significant.

In order to draw up a thorough and well-founded marketing plan for the Flemish Masters theme, it is important to make an estimate of the market potential for this theme. Three factors determine the market potential of the Flemish Masters theme:

- the interest in art and culture when on holiday;
- how well known the Flemish Masters are in a particular market;
- the size of the market.

Market research was carried out to measure the first two factors. To do this, a survey was taken in these markets of the interest in art and culture and how well known the Flemish Masters (Rubens, Van Eyck and Bruegel) are. We measured the size of the market using the number of recreational arrivals in commercial accommodations in Flanders.

This report shows the results of this market research. These results are a contribution to develop the international marketing plan for the Flemish Masters.



# METHODOLOGY

An online survey measured the interest in art and culture of holidaymakers and how well known the Flemish Masters are. VisitFlanders carried out this survey in 17 different countries, namely: the Netherlands, Germany, France, the United Kingdom, Italy, Spain, Switzerland, Austria, Sweden, Denmark, Norway, the United States, Russia, Japan, India, China and Brazil. Respondents throughout the entire country were recruited for the majority of the markets.

In Russia, India, China and Brazil only respondents from major cities were recruited. It concerns the following regions:

- Russia: Moscow and Saint Petersburg
- India: Mumbai and Delhi
- China: tier-1 cities (=highly developed metropolises such as Beijing, Shanghai, Guangzhou and Shenzhen)
- Brazil: Sao Paulo and Rio de Janeiro

Survey participants had to be at least 18 years of age and have been on holiday abroad at least once in the past 3 years.

A quota of 1,000 respondents was set for each country. A total of 17,000 questionnaires were completed. The quota ensured sufficient reliable answers per country, but a comprehensive statement for all countries combined was not possible. As the population per country of those 18 or older who have taken a holiday abroad in the past three years is unknown, it is impossible to reach a total result.

The survey ran from 15 December 2015 to 8 January 2016.

The survey consisted of two parts. The first set measured the interest in art and culture of holidaymakers. The second set was about specific knowledge of European painters and Flemish painters in particular. We used this to estimate how well known the Flemish Masters are.

The questions that measured the interest in art and culture of holidaymakers were analysed further for specific sociodemographic characteristics. Research was done to determine if there was a correlation between age, gender or level of education and an 'interest in art and culture'. This analysis showed that in the panels from the BRIC countries, in particular in China and India, there is an over representation of those with a high level of education and an under representation of older citizens (55+). For the remaining countries the distribution of the respondents for the researched sociodemographic characteristics was good.

This more detailed analysis is explained succinctly in the report; a table with data regarding sociodemographic characteristics can be found on our website [Toerismevlaanderen.be](http://Toerismevlaanderen.be). The results of the analysis of 'interest in art and culture' according to educational level is not included in this text. It is very clear that the higher the level of education a person had, the greater the interest in art and culture was. Regarding the analysis according to gender, the differences are often small. The report indicates where there are significant differences between men and women.

Detail sheets with extra survey results per country are included in the appendix to this report.



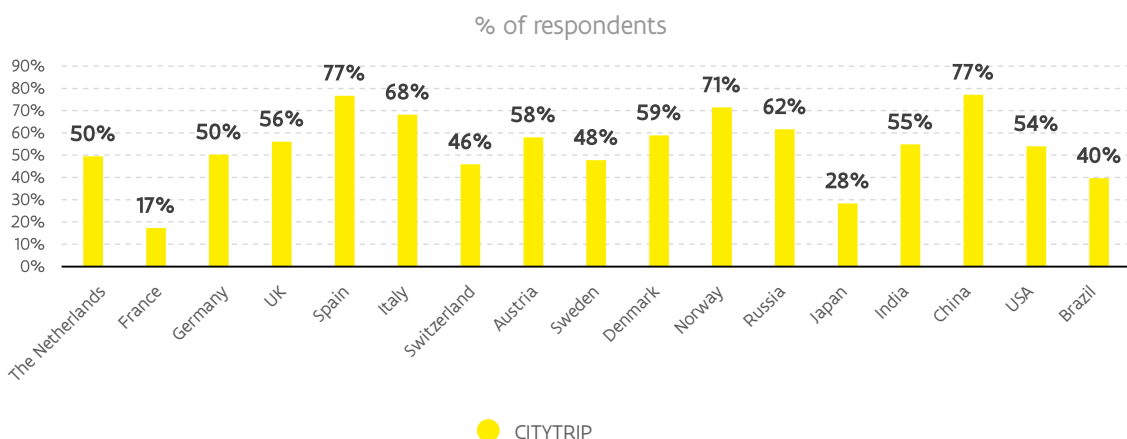
# RESULTS PART I: INTEREST IN ART AND CULTURE


**The first part of the survey contains questions measuring the interest in art and culture of holidaymakers.**

## 1 \ TYPE OF TRIP

The type of trip a respondent made in the last three years was examined in the survey. This can be both domestic trips and trips abroad. Different types of holidays can be associated with an interest in art and culture. For example, people often travel to cities to visit cultural attractions. In almost all of the countries, half or more of the respondents had been on a city trip during the last three years. In Spain, China and Norway, more than 70% had taken a city trip. In France and Japan, this percentage is particularly low; only 17% and 28% say they have taken a city trip.

**CHART 1: HAVE YOU TAKEN A CITY TRIP IN THE LAST 3 YEARS?**







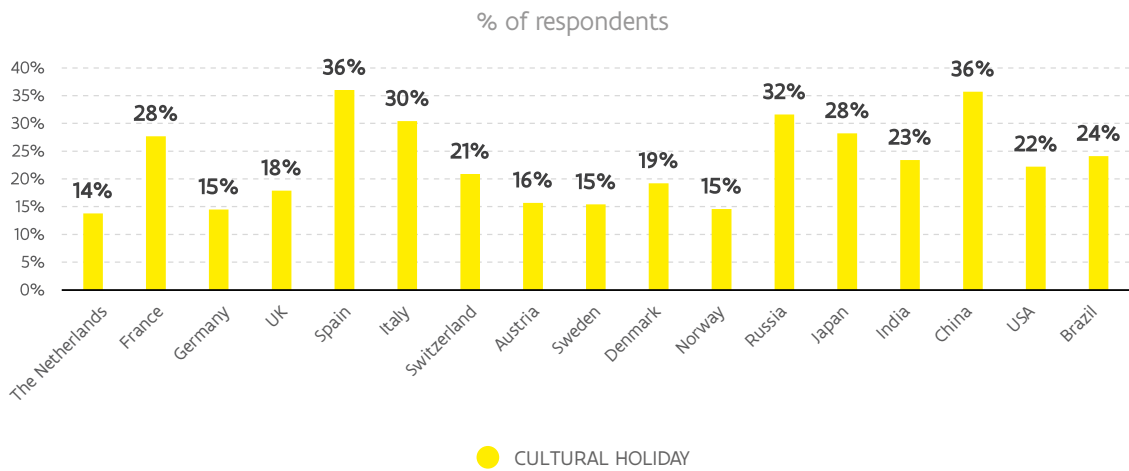
The percentage of young people (18-34 years) who took a city trip was, in almost all the European countries, higher than the global figure (figure for the three age categories combined in that country). However, the percentage of older tourists (55+) who took a city trip is lower than the global figure for most of the European countries. The differences were very high in the Netherlands, Germany, the United Kingdom and Switzerland. 61% of youth in the Netherlands have taken a city trip during the last three years while the percentage is 40% for older tourists. The percentage of young people (59%) is almost twice as high in Switzerland. The percentages of city trippers hardly vary for the intercontinental markets for the various age groups (18-34 years, 35-54 years and 55+) and thus mainly reflect the global figure of that market.

Tourists of course do not just take city trips with the goal of visiting cultural attractions. They also go shopping, walk around the city, etc. In short, whether or not people visit cities isn't sufficient as an indicator for whether a market is interested in art and culture.

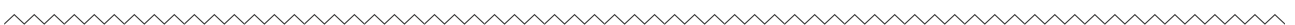
Whether or not the respondent had taken a cultural trip in the last three years was also examined. A cultural trip is of course a broad term and depending on the country will take on a different meaning. In general the goal of a cultural trip is to learn more about the culture of a particular destination. It is not only about the heritage (cultural, religious, industrial and natural heritage), art (museums, galleries, architecture, festivals, etc.) and creative industries (fashion, film, etc.), but also the way of life (language, beliefs, food, traditions, etc.). As a result, there is not a one-to-one relationship between a cultural trip and interest in 'art and culture' in the strict sense, but it does give an impression of whether a market is interested in culture.

The number of respondents who have taken a cultural trip is slightly lower than those who took a city trip. In Spain, Italy, Russia and China, more than 30% had been on a cultural trip during the last 3 years. This percentage is significantly lower in countries such as the Netherlands, Germany, Norway, Sweden and Austria.

**CHART 2: HAVE YOU TAKEN A CULTURAL TRIP IN THE LAST 3 YEARS?**



In Germany, Switzerland, Austria and the Scandinavian countries, the percentage of those between 35 to 54 who took a cultural trip during the last three years was markedly lower than the percentage of the younger group (34 or younger) and older tourists (55+). In contrast, for many markets (France, Spain, Italy, Russia, Japan and the US) age has relatively little influence when it comes to taking a cultural trip. In Switzerland and Germany, the percentage of young people who took a cultural trip was well above the global figure. The percentage of Swiss and Danish young people is 28% and 26%. In Brazil the percentage of older tourists who took a cultural trip was significantly lower than the global figure (a mere 12%).



## 2 \ CRITERIA FOR CHOOSING A TRAVEL DESTINATION

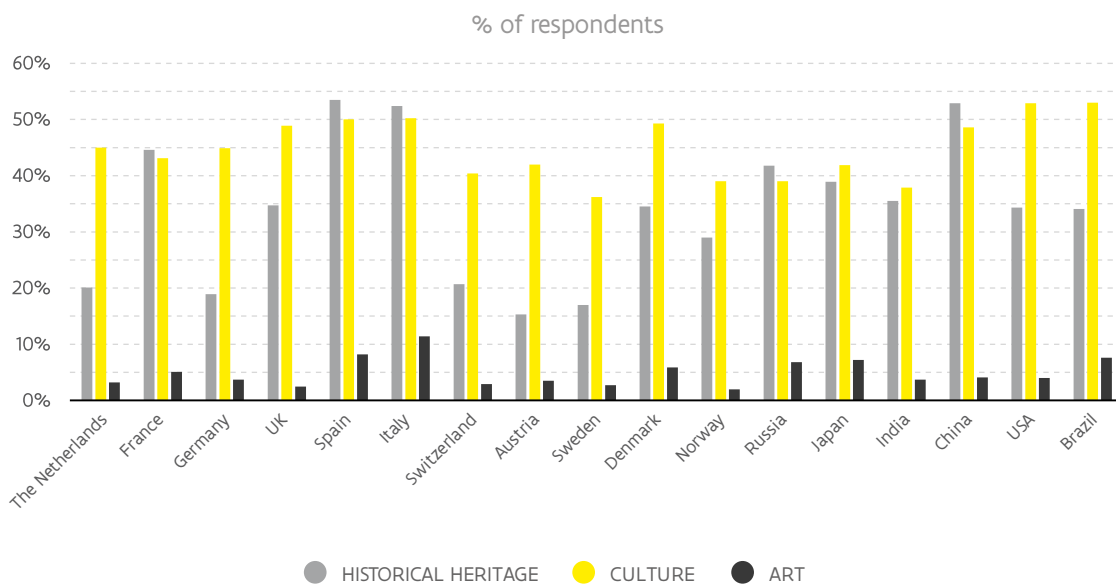
How important are culture, historical heritage and art when choosing a travel destination? This was examined by giving respondents a list of criteria that influence destination choice.

From the chart below we can infer that culture is an important criterion when choosing a travel destination. In all of the countries more than a third to half say this is important. However, as we mentioned previously, the concept of culture is a broad one. Culture includes heritage, history and way of life, which is why culture lovers are not necessarily art lovers.

Historical heritage is an important criterion for the travel choice of more than half of the Spaniards, Italians and Chinese. In the Netherlands, Germany, Switzerland, Austria and Sweden, only 15 to 20% of the respondents say that historical heritage is an important criterion for their travel choice.

The percentage of respondents for whom 'art' is an important criterion for choosing a travel destination is quite a bit lower than for historical heritage and culture in general. Nevertheless, this percentage exceeds 7% in Spain, Italy and Brazil.

**CHART 3:** IS CULTURE, HISTORICAL HERITAGE OR ART AN IMPORTANT CRITERION WHEN CHOOSING YOUR TRAVEL DESTINATION?



In nearly all European markets the criterion 'culture' is less important for those between 35-54. In the United States 61% of older tourists say culture is important when choosing a destination. This percentage is slightly higher than the global figure.

In all countries older tourists say more often that historical heritage is an important criterion when choosing a destination. In nearly all markets those 55 or older are more likely to say that 'art' is an important criterion. In Italy, this percentage is 18%, thus nearly 1/5 of older tourists consider 'art' to be an important criterion for their destination.

Men find the historical heritage criterion slightly more important than women. The differences are greater in countries such as the Netherlands, Sweden, Denmark and Norway. The importance of other criteria is about the same for both men and women.



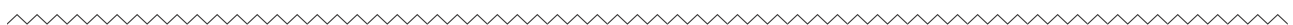
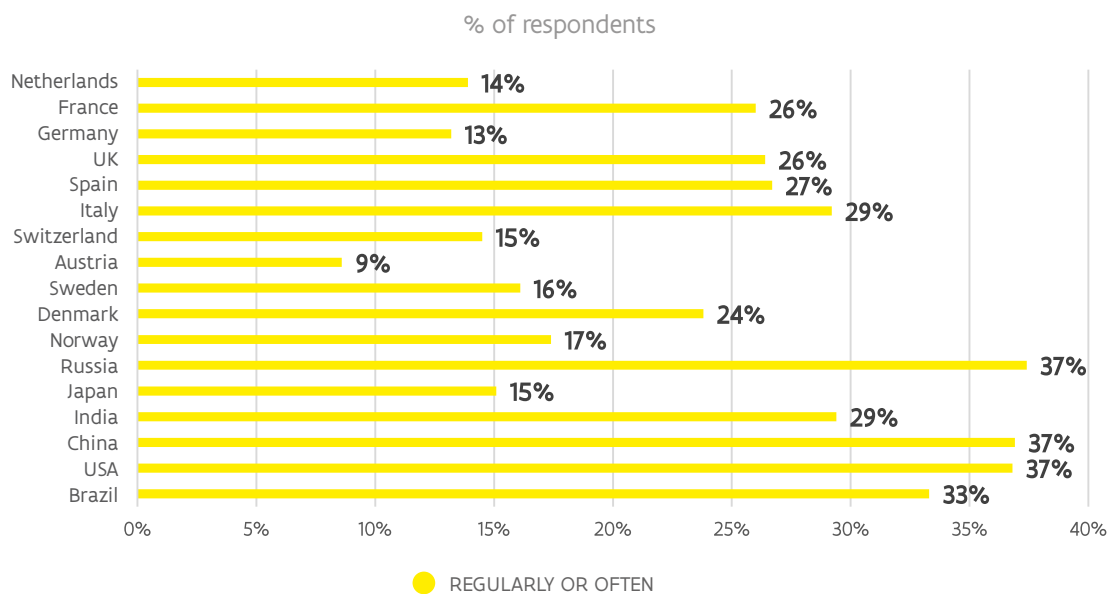
### 3 \ VISITING A MUSEUM OR EXHIBITION ABROAD

The survey examined how often people visit a museum or exhibition abroad, followed by which type of museum is visited most often.

More than a third of the respondents from Russia, China, the United States and Brazil surveyed visited a museum or exhibition abroad regularly to very often. This can be explained by the fact that the percentage of people from these countries taking organised holidays is relatively high. A visit to a certain museum or exhibition is often included in organised holidays.

This percentage is lower for most European countries. However, there are very large differences as well. In the Netherlands, Germany, Switzerland and Austria, the percentage of respondents who regularly or often visit a museum/exhibition is low in comparison to the other countries (< 15%).

**CHART 4: HOW OFTEN DO YOU VISIT A MUSEUM OR EXHIBITION ABROAD?**





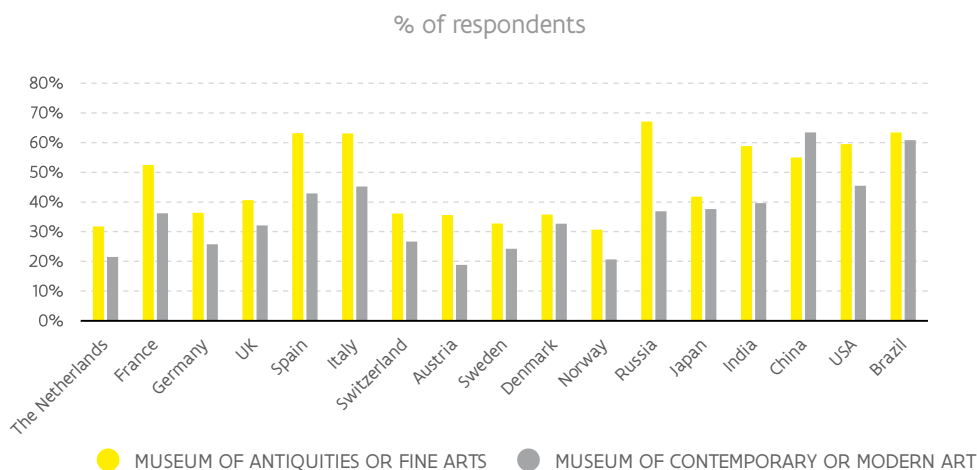
For several markets, the percentage of older tourists who visit a museum abroad regularly to often is lower than the global figure. This difference is relatively high in the United States. In contrast, in most countries the percentage of young people who visit a museum regularly to often is a bit higher than the global figure. The difference is very large in the United States, Brazil and the United Kingdom. In the Scandinavian markets, a reverse pattern can be observed; the percentage of older tourists who visit a museum/exhibition frequently to often is higher than the global figure.

The proportion of men and women who visit a museum or exhibition abroad regularly to often is about the same in all countries. Only in France is the percentage of men (31%) quite a bit higher than women (21%).

In almost all countries, history, folklore or archaeology museums are the types of museums visited most often on holiday. Museums of antiquities and fine arts come in at second place. More than 60% of holidaymakers from Spain, Italy, Russia, the United States and Brazil visit this type of museum. For most markets, the percentage of tourists who visit a museum of modern or contemporary arts is much lower. This type of museum is often visited by tourists from Brazil and China (61% and 63% respectively).

In the Netherlands, Germany, Switzerland, Austria, Sweden and Norway, visits to both museums of antiquities and fine arts and of modern or contemporary arts are much lower.

**CHART 5: WHAT TYPE OF MUSEUM DO YOU USUALLY VISIT ON HOLIDAY?**





For people of all age categories in a majority of countries, visits to fine arts museums are more prevalent than those to contemporary art museums. In nearly every market, the percentage of those above the age of 55 who visit a fine arts museum when on holiday is higher than the global figure. In contrast, in most markets the percentage of young people who visit a contemporary art museum is higher than the global figure. Do take into account that in general (see previous question) the percentage of older tourists who visit a museum abroad frequently to often is lower.

The percentage of men and women who visit a museum for fine arts and a museum for modern or contemporary arts is about the same in all countries. Only in the Netherlands is the percentage of women who visit a museum for fine arts lower than the percentage of men. In contrast, in Russia the percentage of women is quite a bit higher than men. Only in Italy is the percentage of women who visit a museum for modern and contemporary arts higher than the percentage of men.

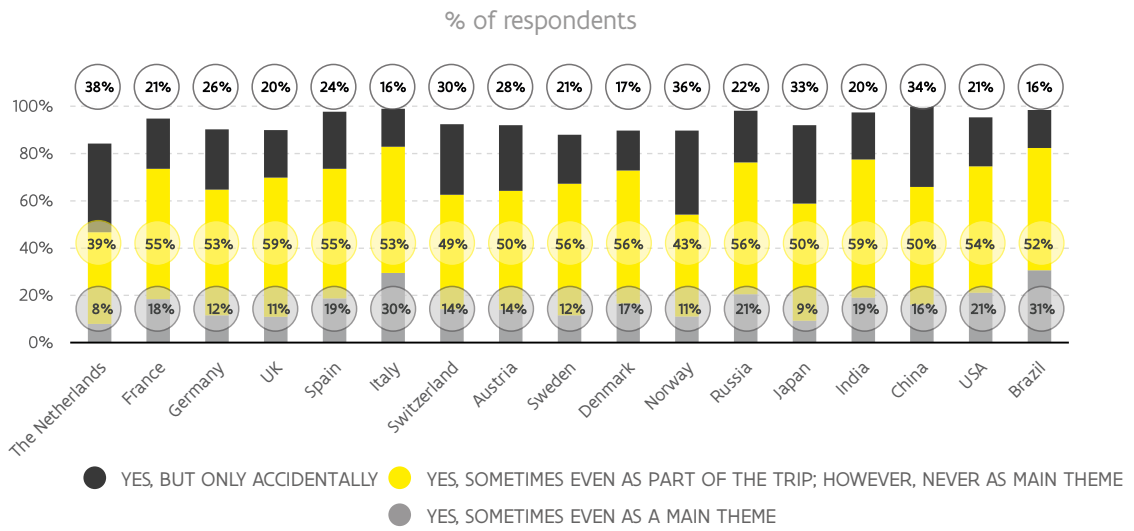


#### 4 \ VISITING PLACES OR ATTENDING EVENTS ASSOCIATED WITH ART AND CULTURE

The survey also examined if people visited places or attended events associated with art and culture while travelling. They were then asked what they visited.

More than half of the tourists visit specific places or attend events associated with art and culture when on holiday. This applies to all markets except the Netherlands. Sometimes visits to such places are the main goal of the trip, but in most cases this is just a part of the trip (not the main goal). Italians and Brazilians take the most trips with 'art and culture' (30% and 31%) as their main theme. In the Netherlands, the United Kingdom, Sweden, Denmark and Norway, more than 10% say they do not visit any places related to art and culture when on holiday.

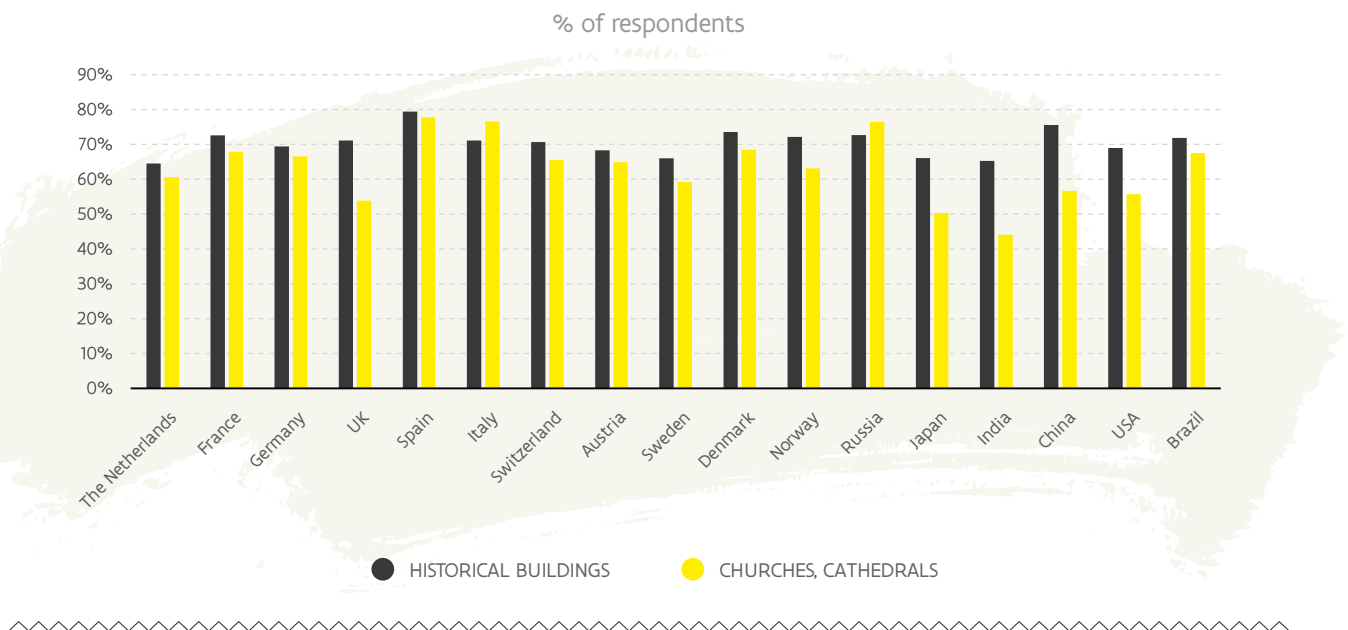
**CHART 6:** WHEN YOU TRAVEL ABROAD DO YOU EVER VISIT PLACES OR ATTEND EVENTS THAT ARE ASSOCIATED WITH ART OR CULTURE?



For many markets, the percentage of those over 55 who intentionally visit places and attend events associated with art and culture during their holiday is higher than the global figure. For the United States, this difference is relatively high (87% compared to 75%). There are two markets in which the percentage of young people who intentionally visit places or attend events associated with art and culture are higher than the global figure: the Netherlands and Norway.

If tourists visit locations associated with art and culture, then they mainly visit historical buildings and churches/cathedrals. These locations are often easily accessible, free and do not require a great deal of time to visit. That's why almost every tourist in Brussels will visit the Grote Markt (cluster of historical buildings and easily accessible). The percentage of respondents who say they visit a church or cathedral is related to the major religions and the followers of those religions in the visitor's own country. This percentage is clearly lower in countries such as Japan, India and China, while the percentage is quite high in Spain, Italy and Russia.

**CHART 7:** DO YOU VISIT HISTORICAL HERITAGE AND/OR CHURCHES/CATHEDRALS WHEN TRAVELLING ABROAD?

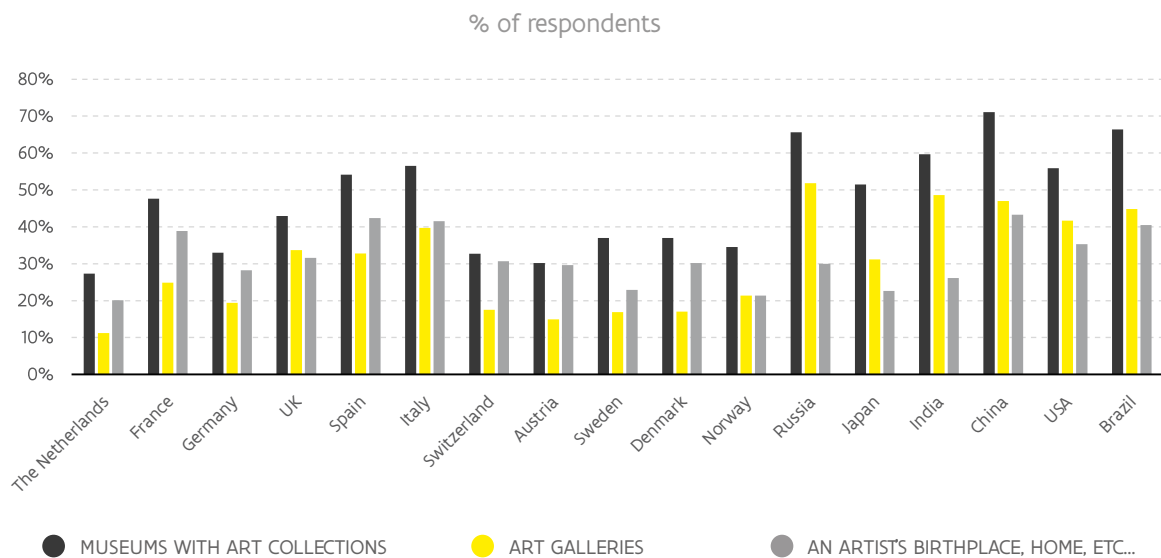


Visiting a museum with an art collection when on holiday is extremely popular in some countries. More than 50% of tourists from Spain, Italy, Russia, Japan, India, China, the United States and Brazil say they do sometimes visit a museum with an art collection when on holiday. As was mentioned earlier on, people from BRIC countries often take organised tours in which these types of locations are a standard part of the package tour.

The percentage of respondents who say they visit an art gallery is lower. But there are countries in which this percentage is relatively high. This is the case for Russia, India, China and Brazil.

What is also striking is the relatively high interest in the history of the artist (visiting the house where an artist was born or lived). In most countries, this is higher than 25%, with the exception of the Netherlands, Sweden, Norway and Japan.

**CHART 8:** WHEN YOU TRAVEL ABROAD DO YOU VISIT MUSEUMS WITH AN ART COLLECTION, ART GALLERIES AND/OR A HOUSE WHERE AN ARTIST LIVED OR WAS BORN?



For most countries, the percentage of older tourists (55+) who visit a museum with an art collection is higher than the global figure. Then again, the percentage of young travellers and those between 34-54 who visit an exhibition is higher than the percentage of older tourists in many markets. In practice, the difference between an art exhibition and a museum with an art collection is not always clear. Therefore, we can say that there is little difference in the age groups when it comes to visiting museums with an art collection/exhibition. Only in Russia do far more older tourists say they visit museums with an art collection/exhibition.

Visiting an art gallery is clearly more popular with young people and the 35-54 age group. For most markets, the percentage of older tourists who visit an art gallery is lower than the global figure. An exception here is Russia where 72% of older tourists say they sometimes visit an art gallery. In most markets, the percentage of men and women who visit an art gallery is quite similar. Exceptions to this are Italy, Russia and India where the percentage of women who visit an art gallery is quite a bit higher than the percentage of men.

For many markets, the proportion of respondents who visit an artist's home and the global figure vary only slightly when we aggregate this by age group. However, there is significant variation in France and Germany where a remarkably larger amount of older tourists report visiting a birthplace, home, etc. of an artist. Visiting an artist's home is clearly more popular among women than men. This percentage is (much) higher for women in almost all markets.



## RESULTS PART II: **KNOWLEDGE OF FLEMISH MASTERS**



Part II of the survey measures specific knowledge of the Flemish Masters (Rubens, Van Eyck and Bruegel).

### 1 \ KNOWLEDGE OF EUROPEAN PAINTERS

In the first place, familiarity with European painters was studied. The table below shows the 10 most mentioned European painters per market. Picasso and Van Gogh are in the top 3 of every market (with the exception of India). Other frequently mentioned painters are Da Vinci, Monet, Rembrandt and Michelangelo. Rubens is in the top 10 in the Netherlands, Germany, Austria, Russia and Norway.

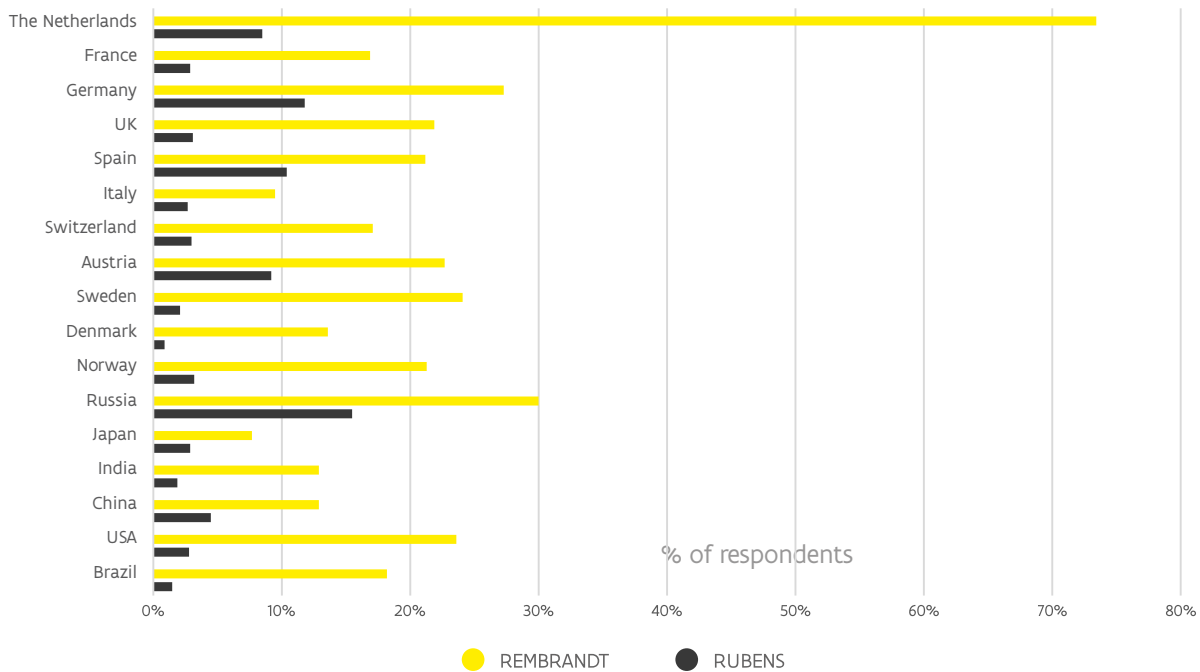


**TABLE 1: WHO ARE THE MOST IMPORTANT PAINTERS IN EUROPE?**

TOP 10	1	2	3	4	5	6	7	8	9	10
<b>NETHERLANDS</b>	Rembrandt	van Gogh	Picasso	Vermeer	Monet	Dalí	da Vinci	Appel	<b>RUBENS</b>	Mondriaan
<b>FRANCE</b>	Picasso	van Gogh	Monet	Dalí	da Vinci	Rembrandt	Renoir	Manet	Michelangelo	Matisse
<b>GERMANY</b>	van Gogh	Picasso	Rembrandt	da Vinci	Monet	Dalí	Dürer	<b>RUBENS</b>	Michelangelo	Chagall
<b>UK</b>	van Gogh	Picasso	Monet	da Vinci	Rembrandt	Michelangelo	Turner	Constable	Dalí	Renoir
<b>DENMARK</b>	Picasso	van Gogh	Monet	da Vinci	Rembrandt	Dalí	Michelangelo	Munch	Jorn	Krøyer
<b>SPAIN</b>	Picasso	van Gogh	Velázquez	Goya	Dalí	Rembrandt	da Vinci	Monet	Michelangelo	El Greco
<b>ITALY</b>	Picasso	van Gogh	da Vinci	Monet	Michelangelo	Caravaggio	Rafaël	Giotto	Dalí	Rembrandt
<b>AUSTRIA</b>	van Gogh	Picasso	da Vinci	Klimt	Rembrandt	Monet	Michelangelo	Dalí	Dürer	<b>RUBENS</b>
<b>SWEDEN</b>	Picasso	da Vinci	van Gogh	Rembrandt	Monet	Michelangelo	Dalí	Zorn	Larsson	Chagall
<b>SWITZERLAND</b>	Picasso	van Gogh	Monet	Dalí	da Vinci	Rembrandt	Michelangelo	Gauguin	Miró	Klee
<b>USA</b>	Picasso	van Gogh	da Vinci	Rembrandt	Monet	Michelangelo	Dalí	Renoir	Matisse	Rafaël
<b>RUSSIA</b>	van Gogh	da Vinci	Picasso	Rembrandt	Dalí	Monet	Michelangelo	Rafaël	<b>RUBENS</b>	Botticelli
<b>JAPAN</b>	van Gogh	Picasso	Monet	da Vinci	Renoir	Vermeer	Michelangelo	Gauguin	Dalí	Rembrandt
<b>INDIA</b>	Picasso	da Vinci	Michelangelo	van Gogh	Rembrandt	Rafaël	Goya	Monet	Titiaan	Cézanne
<b>CHINA</b>	da Vinci	van Gogh	Picasso	Monet	Michelangelo	David J.L.	Rembrandt	Rafaël	Rousseau	Goya
<b>BRAZIL</b>	Picasso	van Gogh	da Vinci	Michelangelo	Dalí	Monet	Rembrandt	Renoir	Caravaggio	Botticelli
<b>NORWAY</b>	Munch	van Gogh	Picasso	da Vinci	Rembrandt	Monet	Michelangelo	Dalí	Matisse	<b>RUBENS</b>

Through this question, we also examine to what extent Rubens is considered as an important European painter. In order to make a comparison possible, the results for Rembrandt are also included in the chart below. Rembrandt is clearly more known than Rubens as he is mentioned as one of the 5 important European painters more frequently than Rubens in all countries. However, in certain countries the results for Rubens are noteworthy. In Russia, Germany and Spain, more than 10% mention Rubens as one of the 5 most important European painters.

**CHART 9: WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?**



## 2 \ KNOWLEDGE OF FLEMISH MASTERS

Familiarity with the Flemish Masters was also measured. In a list of famous painters, respondents could place a check mark next to the painter they had heard of. Rubens, Van Eyck and Bruegel were in the list along with other painters such as Rembrandt, Van Gogh, etc. The chart below shows the results for the Flemish Masters.

Of the Flemish Masters, Rubens is the most well known painter. In neighbouring countries (excluding the UK), as well as Spain and Italy, more than half of the respondents are familiar with Rubens. In Russia, as many as three out of four respondents say they have heard of Rubens. Rubens is clearly less well known in the Scandinavian countries and in the intercontinental markets.

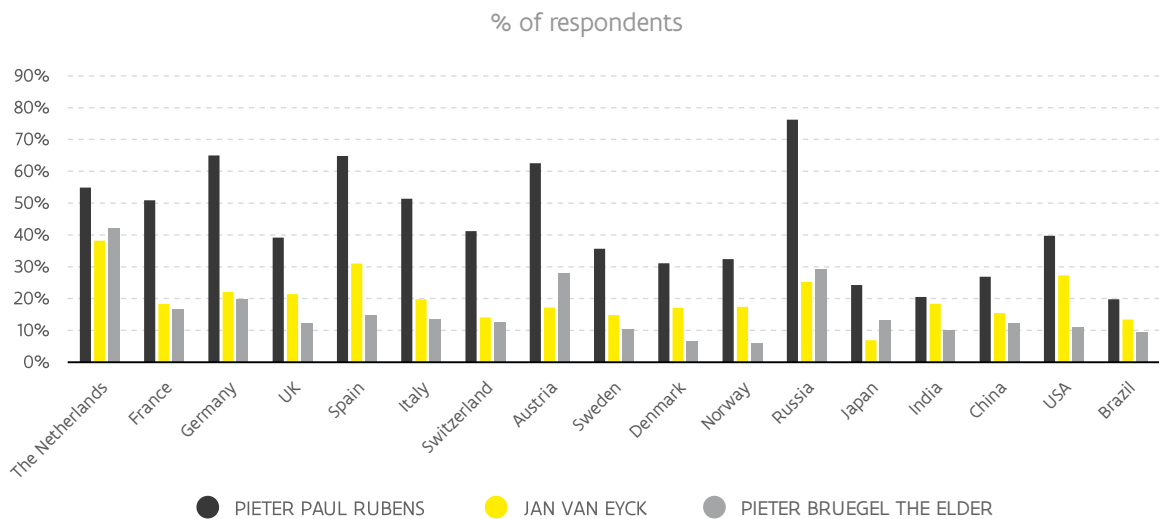
Bruegel and Van Eyck are significantly less familiar than Rubens. Bruegel is best known in the Netherlands, Aus-

tria and Russia. The higher percentage in the Netherlands is not surprising due to the proximity of this country. Bruegel's fame in Austria and Russia is likely due to the fact that renowned works by the Bruegel family hang in Vienna and Moscow.

Van Eyck is best known in the Netherlands, Spain and the United States. For a time, Van Eyck was the court painter for the Count of Holland and had a 'Dutch period'. This likely contributed to Van Eyck's increased renown in the Netherlands. Jan van Eyck gained international fame as a result of his journeys to distant lands in the service of Philip the Good, Duke of Burgundy. This is how he ended up in Spain where his work had an enormous influence on Spanish art. Van Eyck's fame in the United States is associated with his works hanging in Washington, New York and Philadelphia.



**CHART 10: DO YOU KNOW PIETER PAUL RUBENS, JAN VAN EYCK OR PIETER BRUEGEL THE ELDER?**



In every country, Rubens is considered to be one of the three most important painters from Flanders. For many markets Rubens is even the most important Flemish painter. According to respondents in respectively 8 and 7 markets, Van Eyck and Bruegel are among the three most important Flemish painters (of the top 3). What is striking is that Rembrandt is also often mentioned as one of the most important painters from Flanders (top 3 in 8 markets). In France, Sweden and Switzerland, Rembrandt is even considered to be the most important Flemish painter. In Spain, Russia, China and Brazil, Van Dyck is also mentioned as an important Flemish painter. Magritte is in the top 3 in China and Japan.

**TABLE 2: WHO ARE THE THREE MOST IMPORTANT PAINTERS FROM FLANDERS (BELGIUM)?**

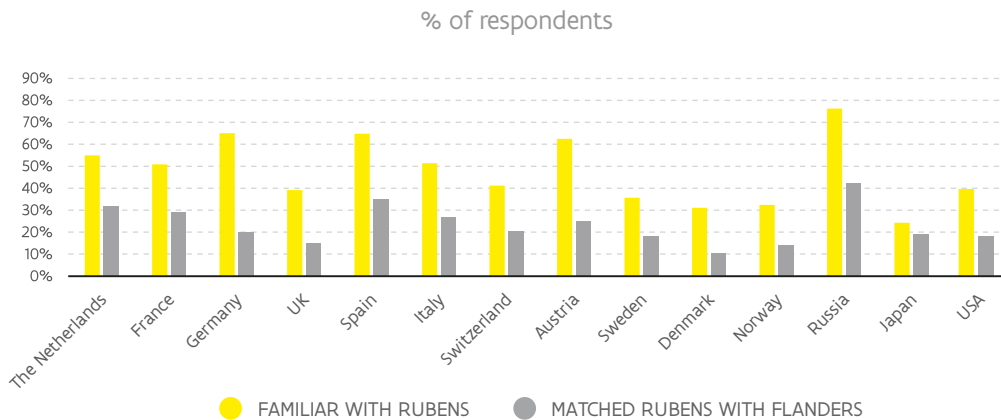
	1	2	3
<b>NETHERLANDS</b>	Rubens	Bruegel	van Eyck
<b>FRANCE</b>	Rembrandt	Rubens	Bruegel
<b>GERMANY</b>	Rubens	Rembrandt	van Gogh
<b>UK</b>	Rubens	van Eyck	Bruegel
<b>DENMARK</b>	Rubens	Rembrandt	Bruegel
<b>SPAIN</b>	Rubens	van Eyck	van Dyck
<b>ITALY</b>	van Eyck	Rembrandt	Rubens
<b>AUSTRIA</b>	Rubens	Bruegel	Rembrandt
<b>SWEDEN</b>	Rembrandt	Rubens	Van Gogh
<b>SWITZERLAND</b>	Rembrandt	Rubens	Bruegel
<b>USA</b>	Rubens	van Eyck	Rembrandt
<b>RUSSIA</b>	Rubens	van Dyck	van Eyck
<b>JAPAN</b>	Rubens	Bruegel	Magritte
<b>INDIA</b>	van Eyck	Rubens	Campin
<b>CHINA</b>	Rubens	van Dyck	Magritte
<b>BRAZIL</b>	van Eyck	Rubens	van Dyck

The survey also measured how well known a number of contemporary artists are. Flemish contemporary artists are not nearly as well known as the Flemish Masters. This can also be inferred from the question above in which Flemish Masters are almost always mentioned in the top three of Flemish painters. That is why it is most certainly worthwhile to invest in the Flemish Masters.

### 3 \ THE CONNECTION WITH FLANDERS

The chart below shows how renowned Rubens is per country and the percentage of respondents who associate Rubens with Flanders. These results clearly show that Rubens is relatively well known in many markets, but is certainly not always associated with Flanders. Several markets do not know exactly where Rubens is from. The results for China, Brazil and India are not shown in the chart below because they are insufficiently reliable for this question.

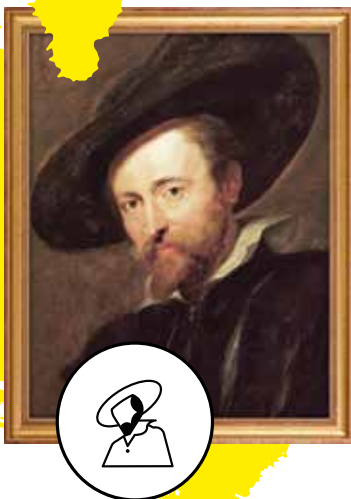
**CHART 11: DO YOU ASSOCIATE PIETER PAUL RUBENS WITH FLANDERS?**



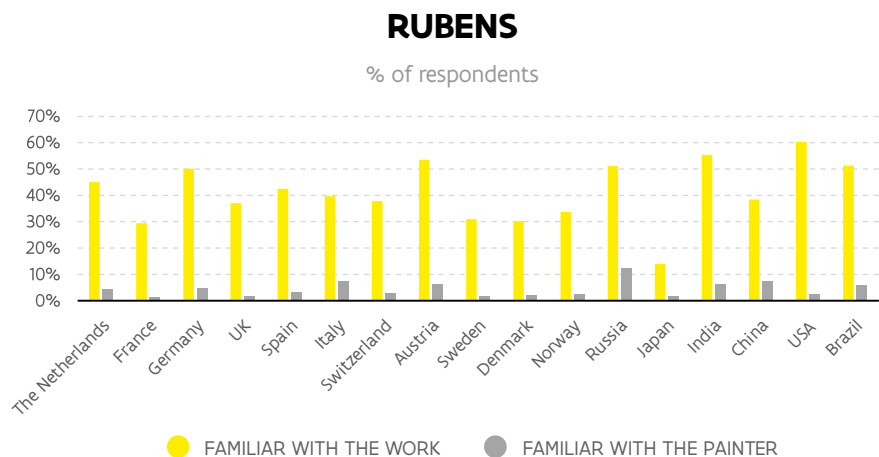
### 4 \ CONNECTION BETWEEN PAINTING AND PAINTER

For the Flemish Masters, the renown of certain paintings was also measured. Respondents were shown works by Rubens (a self-portrait), Van Eyck (Ghent Altarpiece) and Bruegel (The Peasant Wedding) and asked if they recognised it. They were then asked if they knew who the painter was.

In many markets, the knowledge of Rubens's self-portrait is high. Between 30 and 60% of those surveyed say they recognise this painting. However, the work's painter is considerably less familiar. In Russia, 12% say it is by Rubens. In the other markets, the percentage is much lower.



**CHART 12: ARE YOU FAMILIAR WITH THIS WORK?  
DO YOU KNOW WHO PAINTED THIS?**



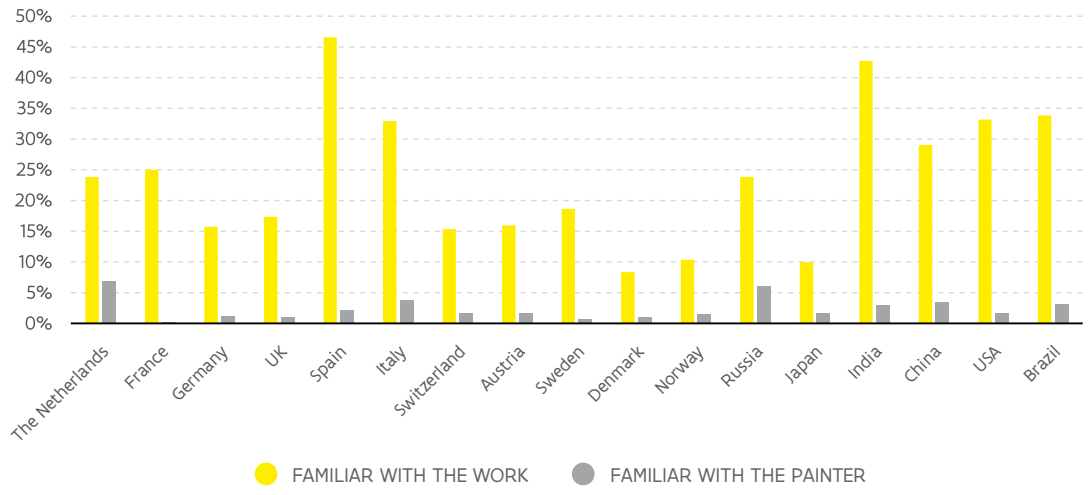


The level of familiarity with the Ghent Altarpiece is lower than that of Rubens’s self-portrait in a majority of markets. It is primarily the Spanish who are familiar with the Ghent Altarpiece. Intercontinental countries also professed more recognition for this painting. However, in India and to a lesser extent in China and Brazil, social acceptability plays more of a role in answering questions. Consequently, there is a higher chance that they will say they recognise this painting. Almost no one from the countries surveyed knew who painted this work of art. The percentage of respondents who were able to name the painter is the highest in the Netherlands and Russia.

**CHART 13: ARE YOU FAMILIAR WITH THIS WORK? DO YOU KNOW WHO PAINTED THIS?**

**VAN EYCK**

% of respondents



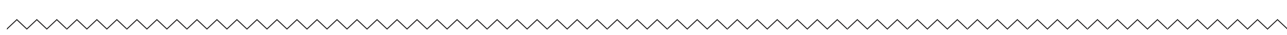
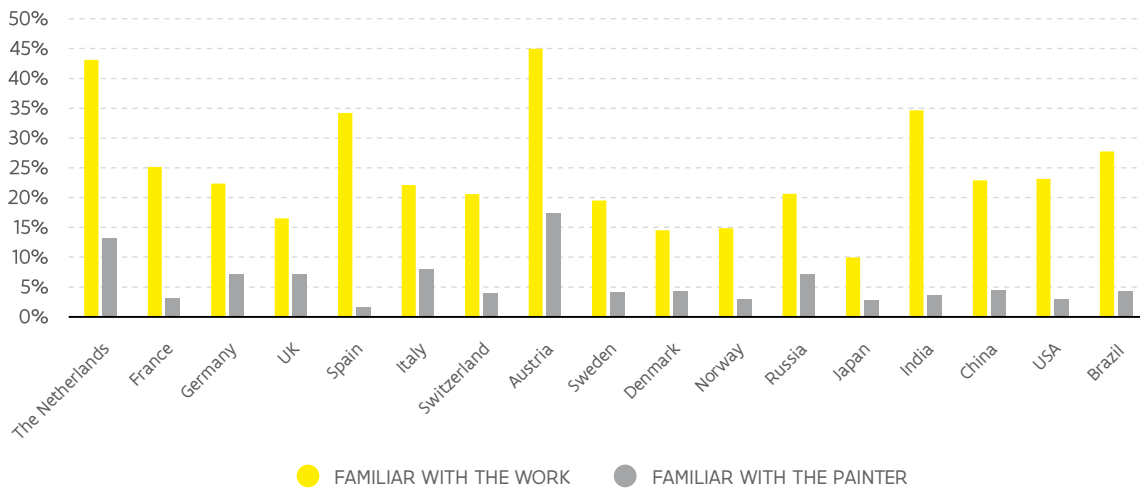
Recognition of Bruegel’s The Peasant Wedding is higher than that of the Ghent Altarpiece in many markets, but still lower than Rubens’s self-portrait. Many respondents from the Netherlands, Spain and Austria say they are familiar with The Peasant Wedding. The percentage aware of who painted it is much lower. However, in the Netherlands and Austria, more than 10% know that Bruegel painted it. In other countries, the percentage is much lower. It is very clear that more respondents associate Bruegel with The Peasant Wedding than Van Eyck with the Ghent Altarpiece. This is logical, as Bruegel has a more recognisable painting style.



**CHART 14:** ARE YOU FAMILIAR WITH THIS WORK? DO YOU KNOW WHO PAINTED THIS?

**BRUEGEL**

% of respondents





# MARKET POTENTIAL FOR THE THEME FLEMISH MASTERS

The market potential of the Flemish Masters theme has been estimated based on three factors:

- the interest in art and culture when on holiday;
- how well known the Flemish Masters are in a particular market;
- the size of the market.

In order to determine if the interest in art and culture in a market is high or low, several results from part one of the survey were combined. As indicators, we used the percentage of respondents who:

- take city trips;
- take cultural trips;
- say that historical heritage is an important criterion for choosing their travel destination;
- say that art is an important criterion for choosing their travel destination;

- visit a museum or exhibition abroad regularly to often;
- sometimes visit places related to art and culture when on holiday (as part of their travels but not as a main goal);
- sometimes visit places related to art and culture when on holiday (sometimes as a main goal);
- visit museums with an art collection when on holiday;
- visit art galleries when on holiday;
- visit the house where an artist lived or was born when on holiday.

In order to determine if the Flemish Masters are well known or less well known on a market, we took into consideration the percentage of the respondents who:

- mention Rubens as an important European painter;
- report familiarity with Rubens;
- report familiarity with Van Eyck;
- report familiarity with Bruegel;





The results for each indicator were aggregated into 4 groups and given a score:

- **high score** = 1 point (= higher than average + standard deviation).
- **average high score** = 0.75 points (= between average and average + standard deviation).
- **low to average score** = 0.25 points (= between low and average - standard deviation).
- **low score** = 0 points (= lower than average - standard deviation).

In this manner a score was calculated for each of the indicators above. Afterwards all the scores were added together. This was calculated for the two dimensions above and, based on these results, a visual overview was created in chart fifteen.

Interest in art and culture are shown on the horizontal axis. Knowledge of the Flemish Masters is shown on the vertical axis. Each market is represented in the figure. The size of the sphere reflects the current market size.

We measured the size of the market using the number of recreational arrivals in commercial accommodations in Flanders. This is based on the figures for 2015.

**TABLE 3: ARRIVALS FOR LEISURE PURPOSES IN FLANDERS (FIGURES 2015)**

<b>NETHERLANDS</b>	1 019 494	<b>DENMARK</b>	22 449
<b>FRANCE</b>	631 458	<b>NORWAY</b>	13 508
<b>GERMANY</b>	483 838	<b>RUSSIA</b>	40 633
<b>UK</b>	621 239	<b>JAPAN</b>	55 782
<b>SPAIN</b>	216 252	<b>INDIA</b>	27 917
<b>ITALY</b>	134 036	<b>CHINA</b>	104 925
<b>SWITZERLAND</b>	57 699	<b>USA</b>	182 222
<b>AUSTRIA</b>	18 899	<b>BRAZIL</b>	46 575
<b>SWEDEN</b>	23 384		

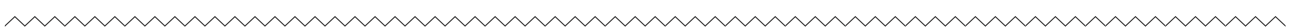
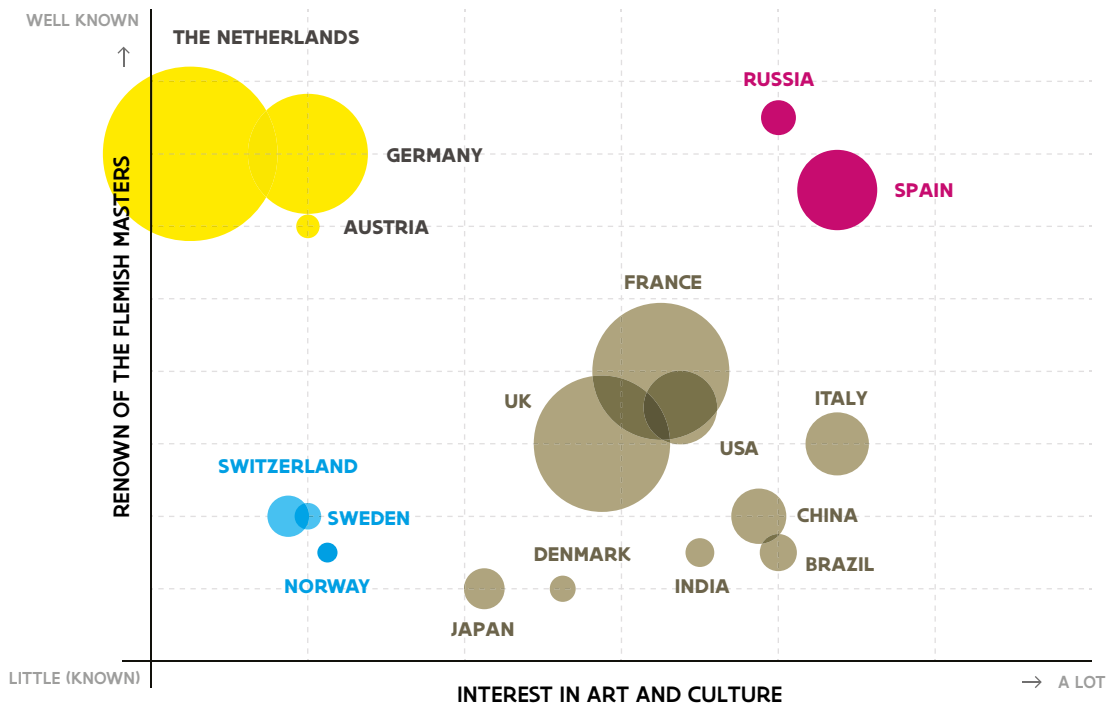


CHART 15: MARKET POTENTIAL FOR THE FLEMISH MASTERS THEME

### TOURIST POTENTIAL OF THE FLEMISH MASTERS



We can divide the various markets into 4 main clusters:

**TYPE**

1

markets with a high interest in art and culture and with a significantly high knowledge of the Flemish Masters: Russia and Spain;

**TYPE**

2

markets with an average to high interest in art and culture but with average to poor knowledge of the Flemish Masters: Italy, Brazil, China, the United Kingdom, the United States, France, Denmark, India and Japan;

**TYPE**

3

markets with a low interest in art and culture but with significant familiarity with Flemish Masters: The Netherlands, Germany and Austria

**TYPE**

4

markets with a low interest in art and culture and very poor knowledge of the Flemish Masters: Switzerland, Norway and Sweden.

The four clusters and the size of the markets are the foundation for developing a market-specific approach in the international marketing plan for the Flemish Masters. In general we can say that markets with a high interest in art and culture will also be interested in experiences related to the Flemish Masters. More efforts will be needed to put the Flemish Masters theme at the foreground in the markets in which the Flemish Masters are not well known.

# APPENDIX FACTS SHEETS





# THE NETHERLANDS

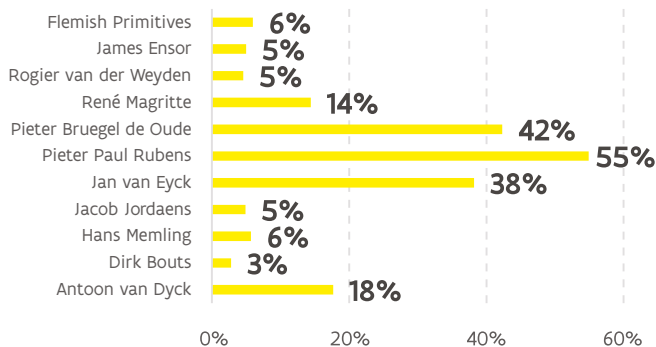


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

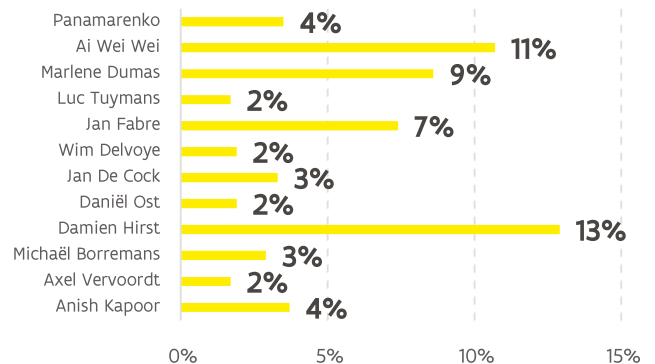
A painter must be mentioned at least 20 times before he will appear in the word cloud.



## WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



## WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

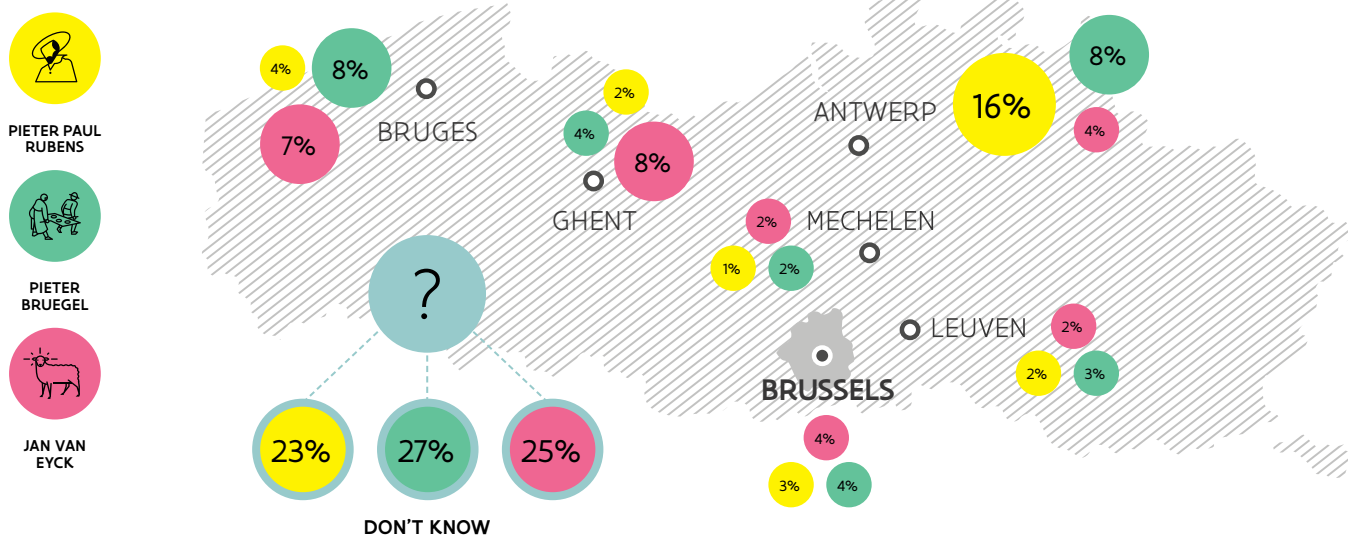


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=508)

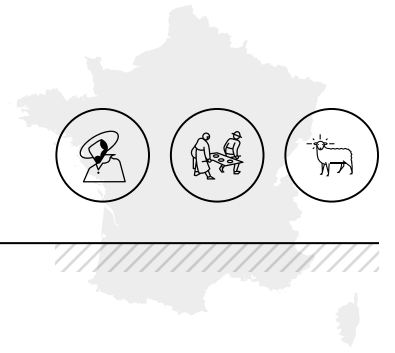


87% of the Dutch can name at least one European painter. According to the Dutch, the five most important European painters are: Rembrandt, Van Gogh, Picasso, Vermeer and Monet. The Flemish historical painters are well known in the Netherlands with Rubens (55%), Bruegel (42%) and Van Eyck (38%) at the top of the list. Antoon Van Dyck and René Magritte are also surprisingly well known. Contemporary artists, however, are not nearly as well known. Damien Hirst (13%)

and Ai Wei Wei (11%) are the most well known. In the case of Ai Wei Wei, his fame is probably due to his political activism. In the Netherlands, 58% say they are familiar with the term 'Flemish Masters', 8% of the respondents associate this term with Flemish painters from the 15th to the 17th centuries. The Dutch associate the term 'Flemish Masters' mainly with famous Flemish painters.

Approximately half of the Dutch people (51%) were asked to match three Flemish Masters with an art city. Approximately a quarter of Dutch people could actually match the Flemish Masters with an art city. The most well-known match was for Rubens and Antwerp (16%), followed by Van Eyck and Ghent (8%). Bruegel is most often associated with Bruges (8%), although Bruegel lived and worked near Brussels and Antwerp.

# FRANCE

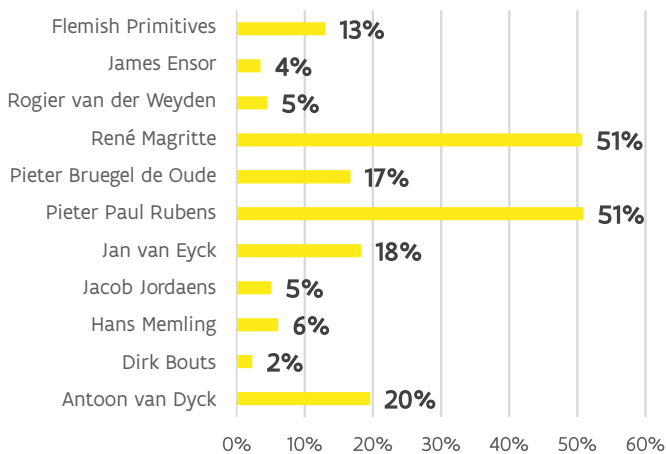


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

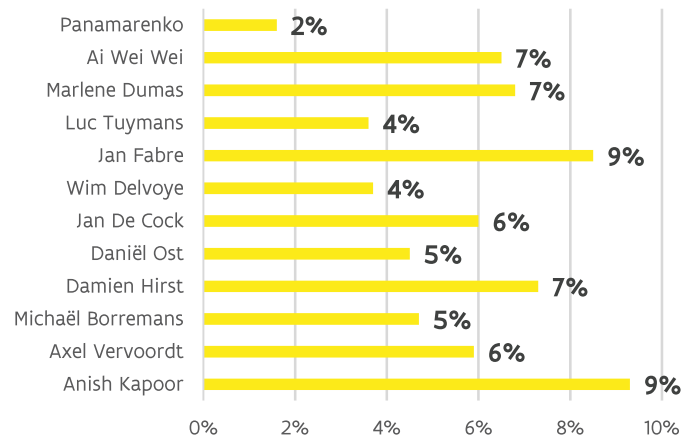
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?



## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=521)



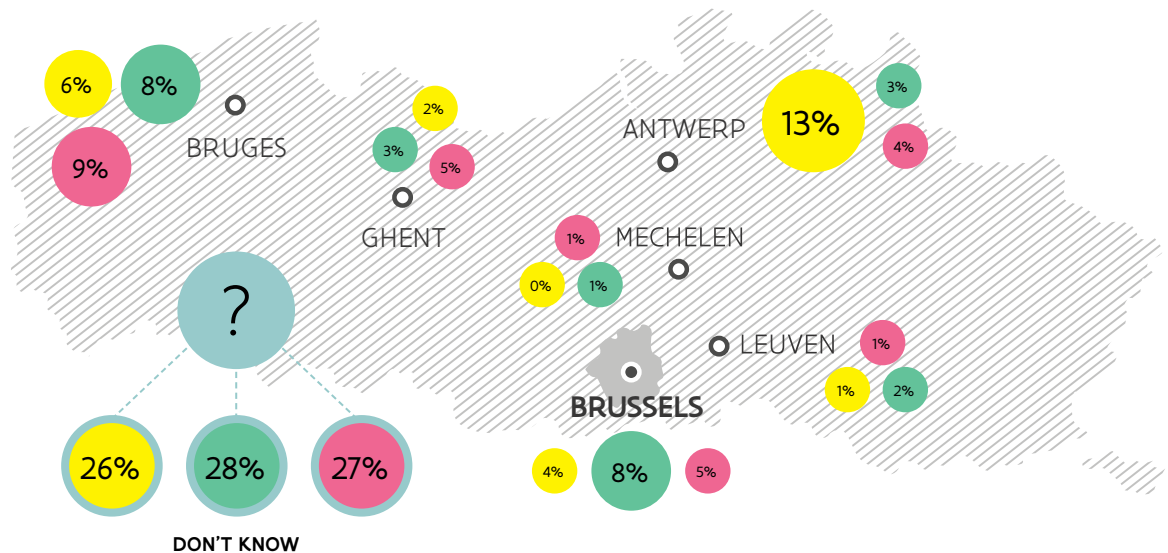
PIETER PAUL RUBENS



PIETER BRUEGEL



JAN VAN EYCK



88% of the French can name at least one European painter. The five most important painters are: Picasso, Van Gogh, Monet, Dali and Da Vinci. Belgian painters are recognised rather less than in the Netherlands. Between 17% and 20% say they are familiar with Bruegel, Van Eyck or Van Dyck. More than half are familiar with Rubens and Magritte. Knowledge of contemporary painters is very limited: not a single one of the artists were mentioned by more than 10% of the respondents. Contrary to many other countries, Ai Wei

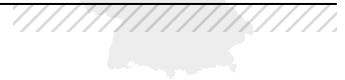
Wei is not the most well known. Anish Kapoor (9%) and Jan Fabre (9%) are the most well known.

In France, 56% say they are familiar with the term 'Flemish Masters', 6% of the respondents associate this with Flemish painters from the 15th to the 17th centuries. The French associate the term Flemish Masters mainly with painters, a school of painters, Belgium and the Renaissance.

Just over half of the French people (52%) were asked to match the three Flemish Masters with an art city. The most well-known match was for Rubens and Antwerp (13%), followed by Van Eyck and Bruges (9%). Van Eyck lived and painted in Bruges for a season. In France, as in almost all the other countries, the connection between Van Eyck and Ghent is less well known, despite the Ghent Altarpiece hanging in the St. Bavo Cathedral. Bruegel is mainly associated with Bruges and Brussels.



# GERMANY

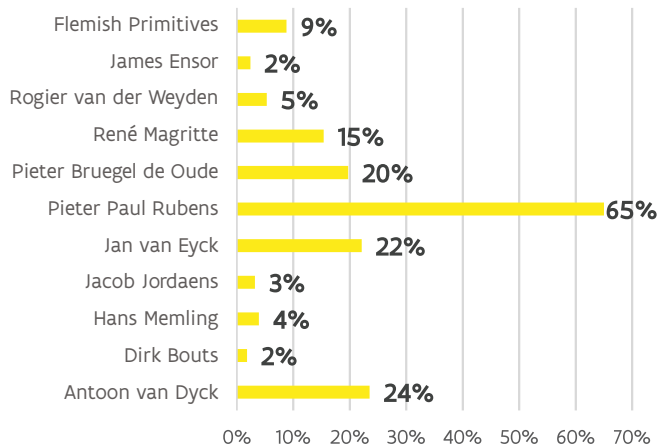


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

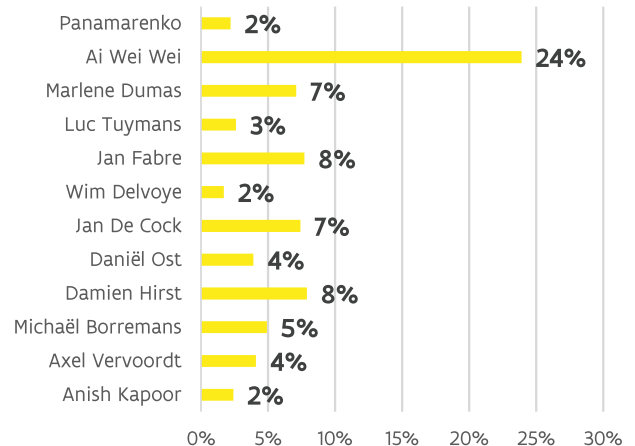
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

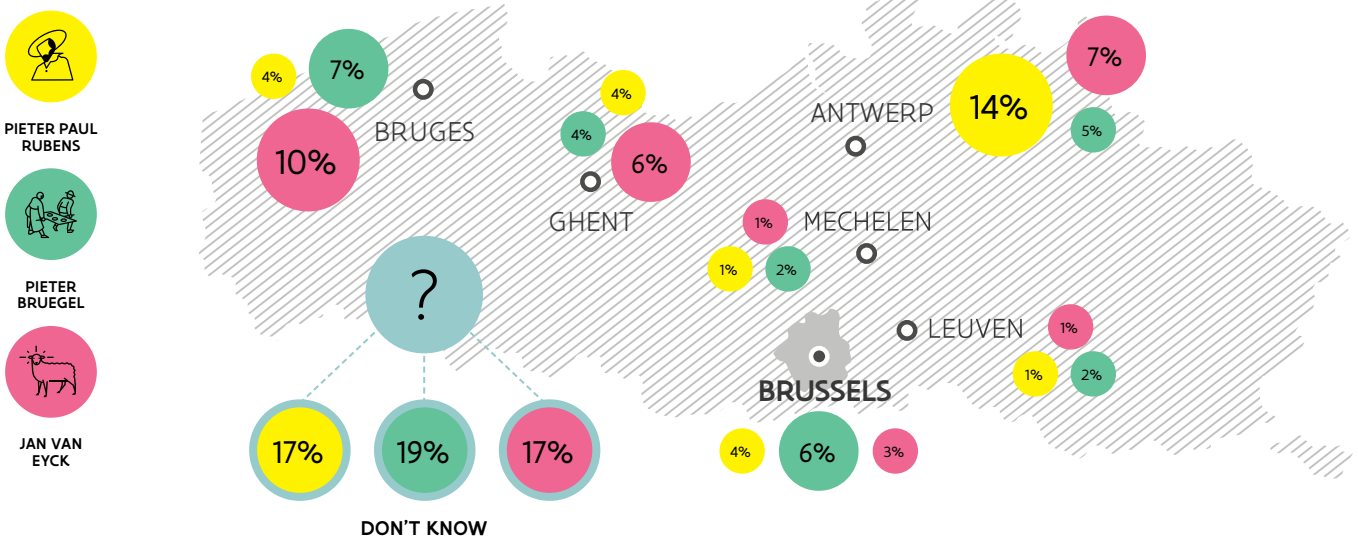


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=440)



78% of Germans can name at least one European painter. According to the Germans, the 5 most important European painters are: Van Gogh, Picasso, Rembrandt, Da Vinci and Monet. 20 to 25% of Germans are familiar with the Flemish painters Bruegel, Van Eyck or Van Dyck. Rubens is the most well known (65%). Knowledge about contemporary painters is quite limited overall, with less than 10% having heard of the painters on the set list. Ai Wei Wei is an exception, nearly a quarter of the Germans say they

have heard of him. Ai Wei Wei's fame is probably due to his political activism.

In Germany, 54% say they are familiar with the term 'Flemish Masters', 6% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. The term Flemish Masters is mainly associated with painters from the Netherlands and Belgium.

Less than half of the Germans (44%) were asked to match three Flemish Masters

with an art city. Just over 20% could actually match the Flemish Masters with an art city. The most well-known match was for Rubens and Antwerp (14%), followed by Van Eyck and Bruges (10%). Van Eyck lived and painted in Bruges for a season. Here, as in almost all the other countries, the connection between Van Eyck and Ghent is less familiar, despite the Ghent Altarpiece hanging in the St Bavo Cathedral. Bruegel is mainly associated with Bruges and Brussels.

# UNITED KINGDOM

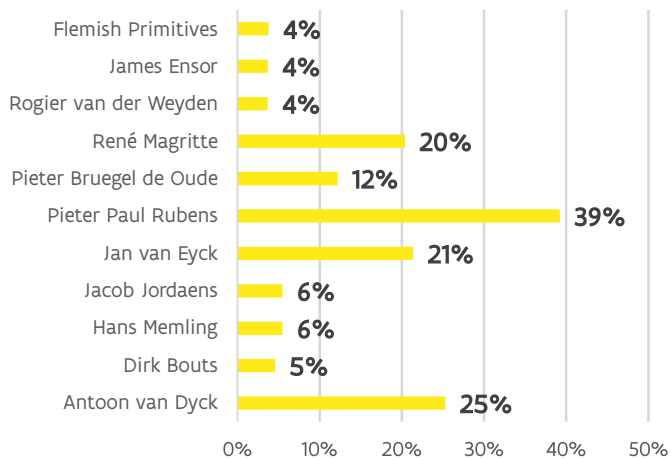


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

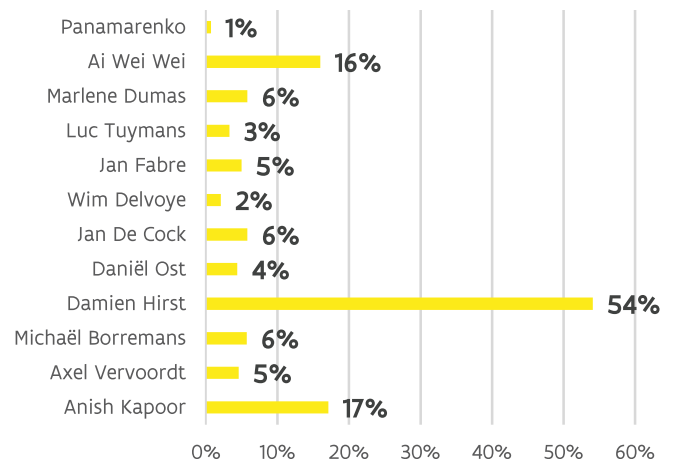
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

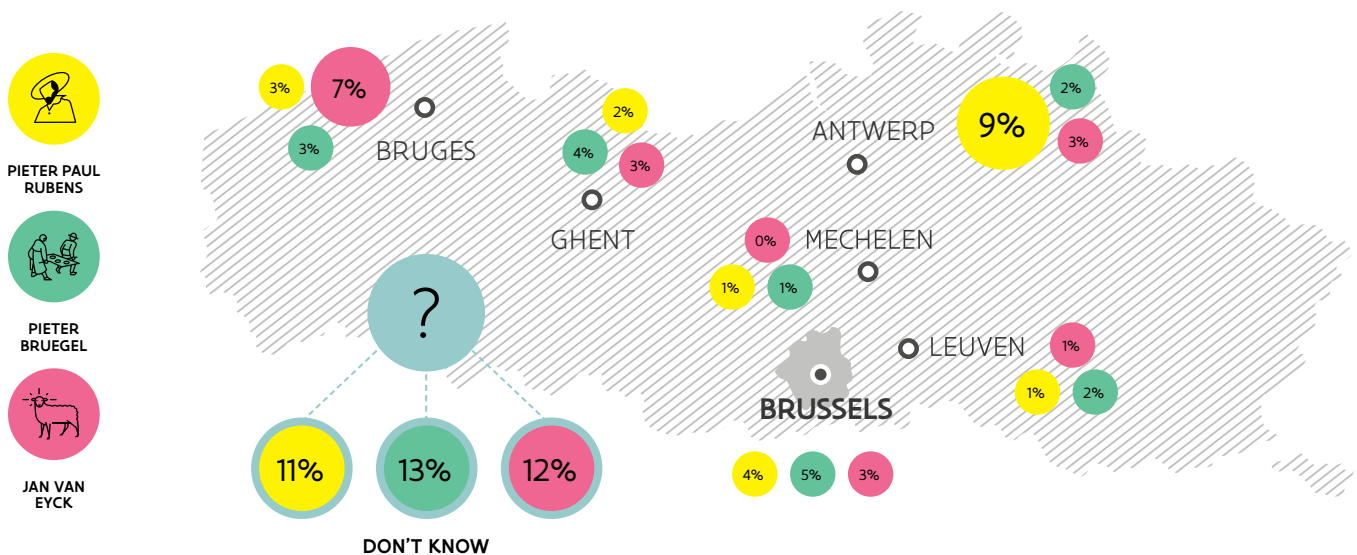


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=304)



British knowledge of painters is fairly low. 30% of respondents could not name a single European painter. According to the British, the 5 most important European painters are: Van Gogh, Picasso, Monet, Da Vinci and Rembrandt. Of the Belgian painters, Rubens is the most well known. Between 20% and 25% of the Brits are familiar with Magritte, Van Eyck or Van Dyck. Only 12% are familiar with Bruegel. Knowledge about contemporary painters is generally limited, although three painters do stand out. More than 10% say they have heard of both Anish

Kapoor (who lives in the United Kingdom) and Ai Wei Wei. More than half of the respondents have heard of Damien Hirst, a Briton.

In the United Kingdom, 43% say they are familiar with the term 'Flemish Masters', but only 4% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. The term Flemish Masters is mainly associated with painters from Belgium and Flanders.

30% of British respondents were asked to match three Flemish Masters with an art city. Just under 20% could actually match the Flemish Masters with an art city. The most well-known match was for Rubens and Antwerp (9%), followed by Van Eyck and Ghent (7%). Van Eyck lived and painted in Bruges for a season. In the United Kingdom, as in almost all other countries, the connection between Van Eyck and Ghent is less well known, despite the Ghent Altarpiece hanging in the St. Bavo Cathedral. Bruegel is mainly associated with Brussels.

# SPAIN

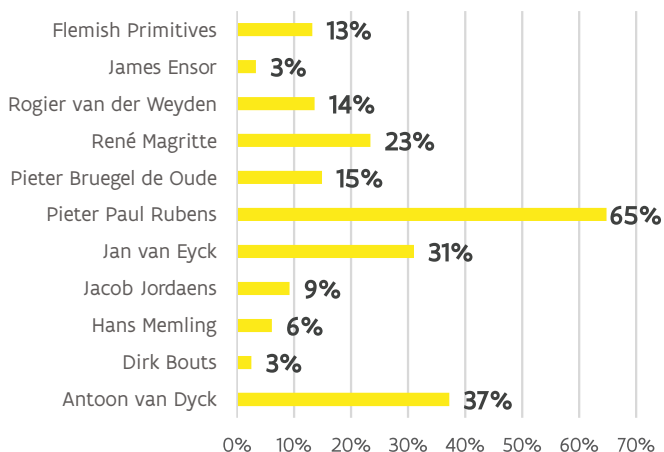


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

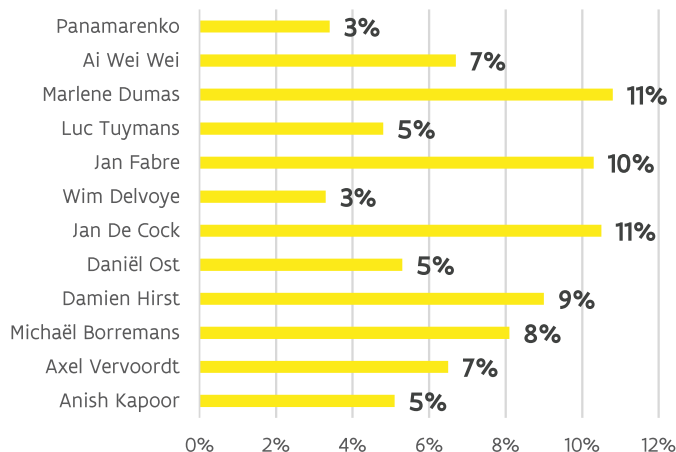
A painter must be mentioned at least 20 times before he will appear in the word cloud.



## WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



## WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

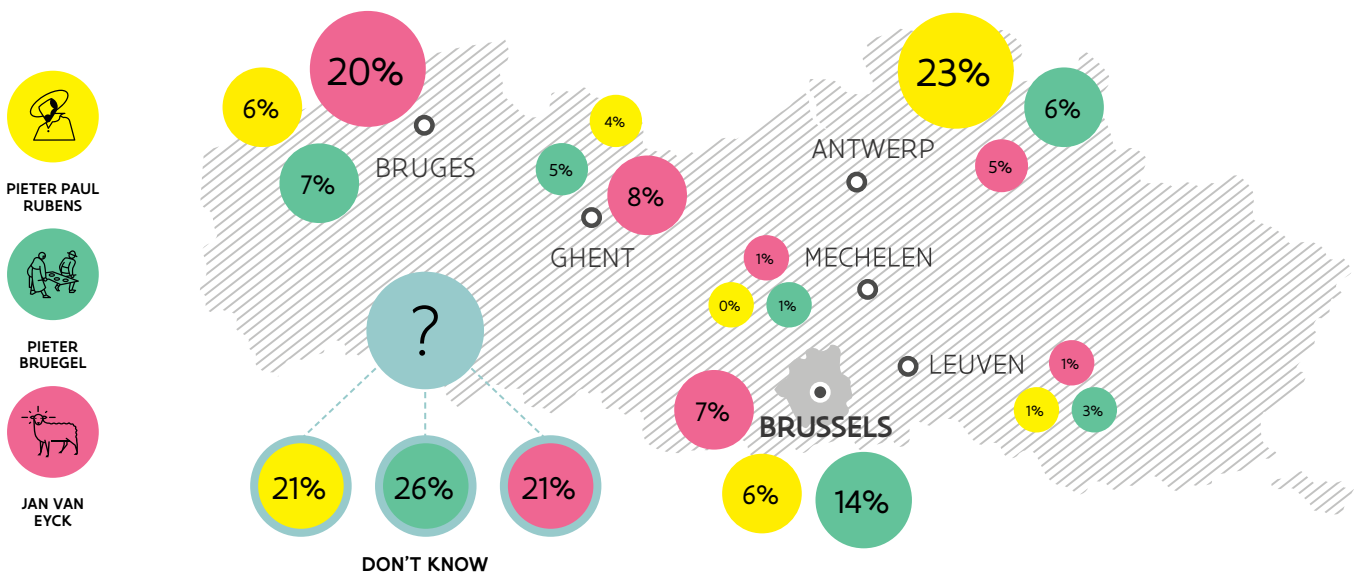


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=617)



The Spanish are highly knowledgeable about painters. 95% can name at least one European painter. For Spain, the 5 most important European painters are: Picasso, Van Gogh, Velázquez, Goya and Dalí. All but one of these are Spanish painters. The most famous Belgian painter is Rubens. But more than 20% of the Spaniards also say they are familiar with Van Dyck, Van Eyck or Magritte. Bruegel is less well known (15%). Knowledge about contemporary painters is generally more limited, but in this area Spain also scores better than other countries. The most

well-known contemporary painters in Spain are: Marlene Dumas, Jan De Cock and Jan Fabre.

In Spain, 73% say they are familiar with the term 'Flemish Masters', 10% of the respondents associate this term with Flemish painters from the 15th to the 17th centuries. They mainly associate this with painters from the Netherlands and Belgium, a painting school and the Renaissance.

62% of Spanish respondents were asked to match the three Flemish Masters with

an art city. This is the highest percentage after Russia. More than 35% could actually match a Flemish Masters with an art city. The most well-known combination is for Rubens - Antwerp, almost a quarter of the respondents mentioned this. Van Eyck is most often associated with Bruges (20%) and Bruegel with Brussels (14%). Van Eyck lived and painted in Bruges for a season. In Spain, as in almost all other countries, the connection between Van Eyck and Ghent is less well known, despite the Ghent Altarpiece hanging in the St. Bavo Cathedral.

# ITALY

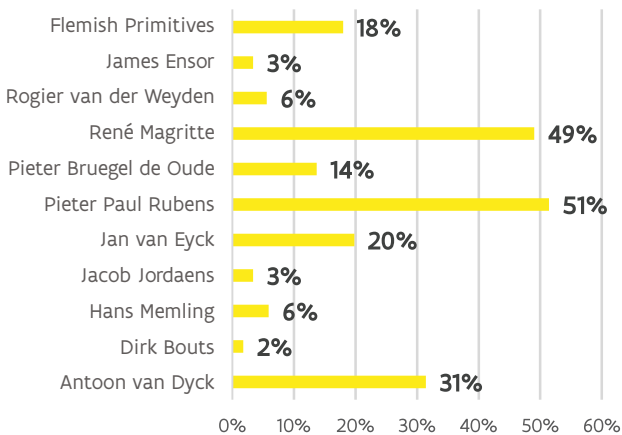


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

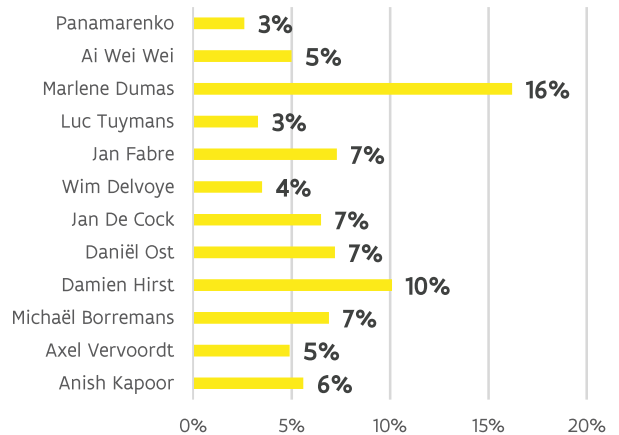
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

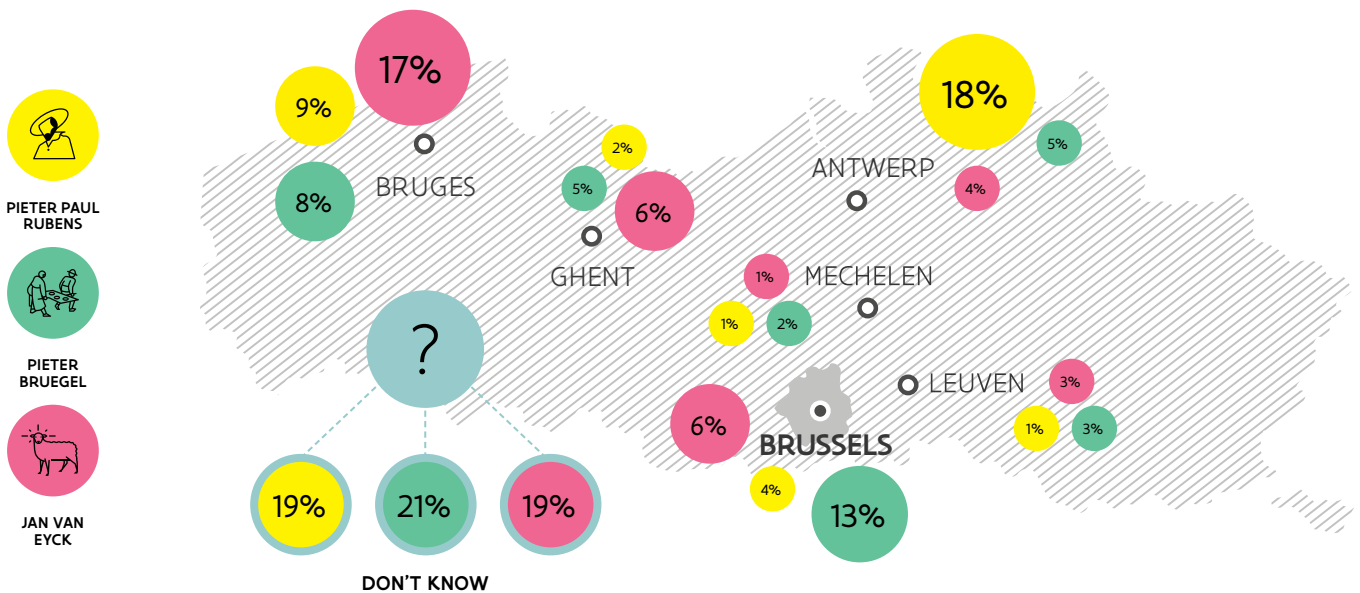


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=546)



The Italians have an extensive knowledge of painters. 93% can name at least one important European painter. According to the Italians, the 5 most important European painters are: Picasso, Van Gogh, Monet, Da Vinci and Michelangelo. The most well-known Flemish Masters are Rubens (51%), Van Dyck (31%) and Van Eyck (20%). Almost half of the Italians surveyed also say they have heard of Magritte. Only 14% are familiar with Bruegel. Knowledge about contemporary

painters is limited overall. Marlene Dumas is the most famous (16%).

In Italy, 78% say they are familiar with the term 'Flemish Masters', 10% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. They mainly associate this with painters, the Netherlands, the 15th centuries and oil paint.

Just over half of the Italian respondents

were asked to match the three Flemish Masters with an art city. Approximately 30% of the respondents can actually match a Flemish Master with an art city. 18% associated Rubens with Antwerp; 17% Van Eyck with Bruges and 13% Bruegel with Brussels. Van Eyck lived and painted in Bruges for a season. Here, as in almost all the other countries, the connection between Van Eyck and Ghent is less well known, despite the Ghent Altarpiece hanging in the St. Bavo Cathedral.



# SWITZERLAND

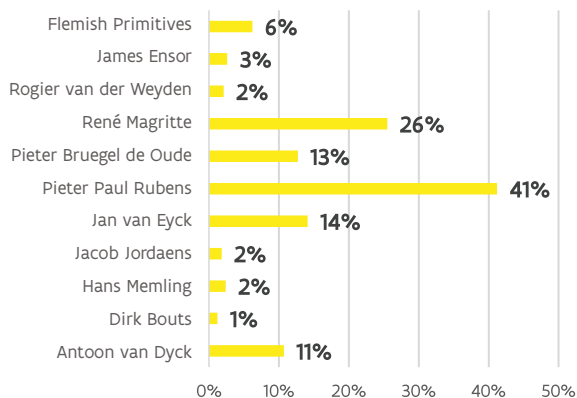


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

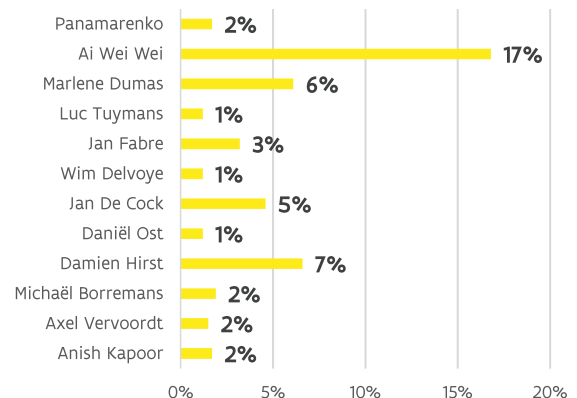
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

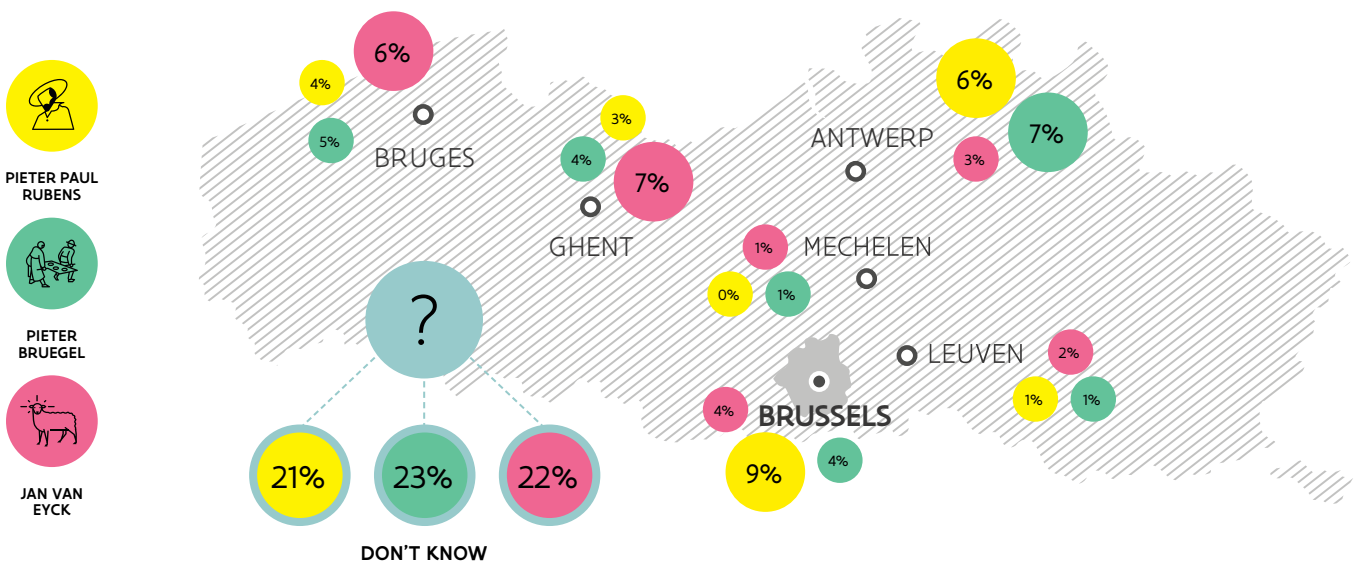


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=438)



85% of the Swiss can name at least one European painter. According to the Swiss, the 5 most important European painters are: Picasso, Van Gogh, Monet, Dali and Da Vinci. Of the Flemish Masters, Rubens (41%) is the most well known. Van Eyck is almost as well known as Bruegel (approximately 14%). One in 4 say they are familiar with Magritte. Knowledge about contemporary painters is very low, only Ai Wei Wei is somewhat more well known (17%). His fame is probably due to his political activism.

In Switzerland, 42% say they are familiar with the term 'Flemish Masters', and 5% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. They mainly associate this with painters, the Netherlands, Belgium and a painting school.

44% of the Swiss respondents were asked to match the three Flemish Masters with an art city. Approximately one in five of the respondents can actually match the Flemish Masters with an art city. Where

the rest of the European interviewees mainly associate Rubens with Antwerp, the Swiss associate Rubens first and foremost with Brussels (9%). Further, they associate Van Eyck with Ghent (7%) and Bruegel with Antwerp (7%).

# AUSTRIA

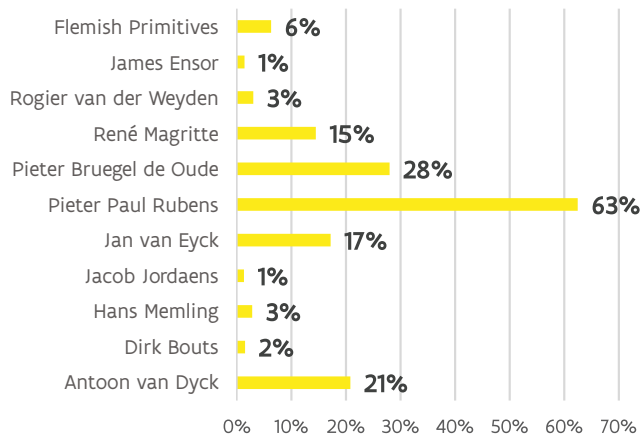


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

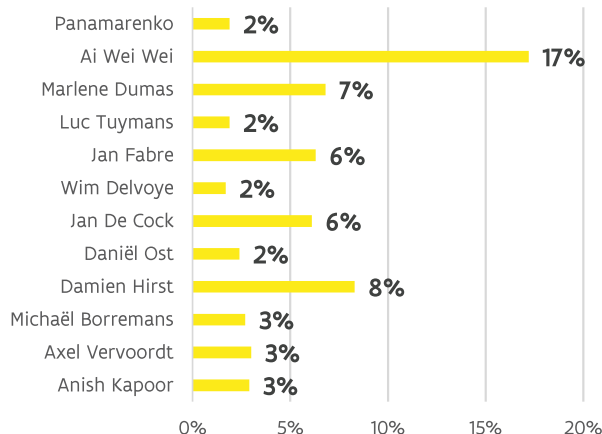
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

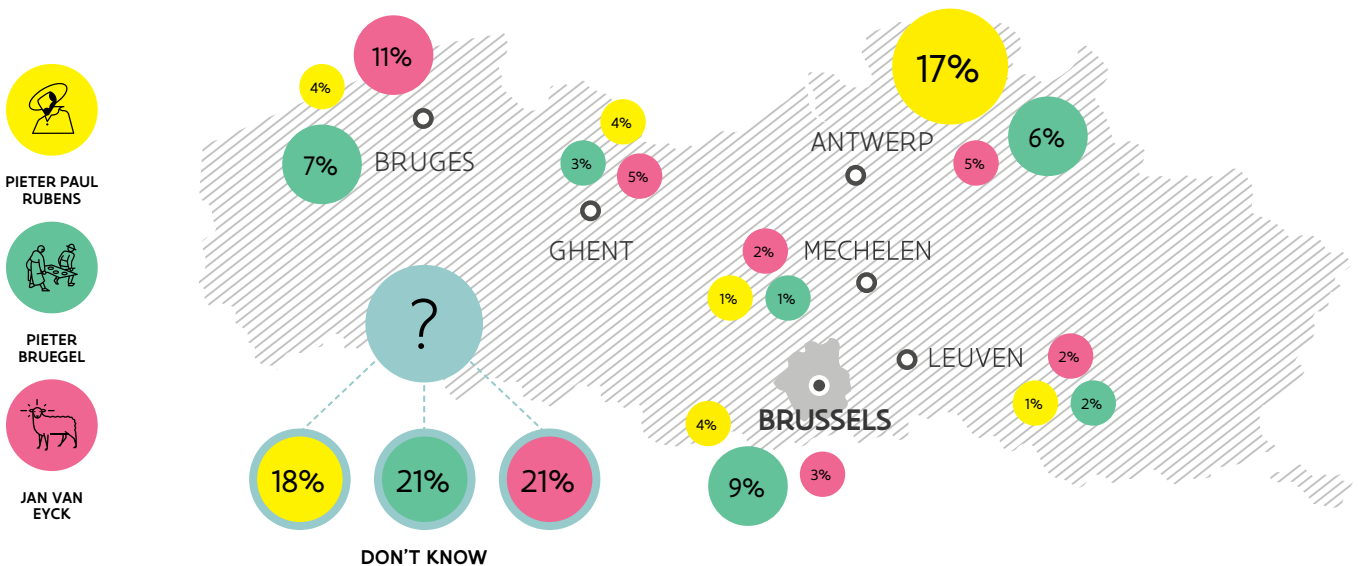


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=483)



85% of Austrians can name at least one European painter. The 5 most important European painters are: Van Gogh, Picasso, Da Vinci, Klimt and Rembrandt. Klimt is an eminent painter from Austria. The most well-known Belgian painter is Rubens (63%). 28% say they have heard of Bruegel and 21% Van Dyck. Knowledge about contemporary painters is limited overall. The only one who is vaguely recognised is Ai Wei Wei (17%).

In Austria, 51% say they are familiar with the term 'Flemish Masters', and 6% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. They mainly associate this term with painters from the Netherlands.

48% of the Austrian respondents were asked to match three Flemish Masters with an art city. Approximately one in five could actually match a Flemish Master with an art city. 17% associated

Rubens with Antwerp, 11% Van Eyck with Bruges and 9% Bruegel with Brussels. Van Eyck lived and painted in Bruges for a time. Here, just as in almost every other country, the link between Van Eyck and Ghent is less well known despite the fact that the Ghent Altarpiece hangs in the St. Bavo Cathedral.

# SWEDEN

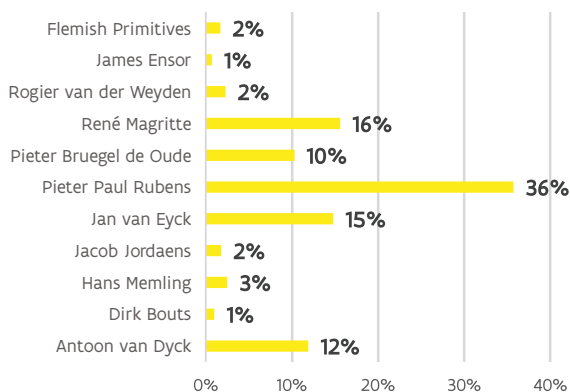


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

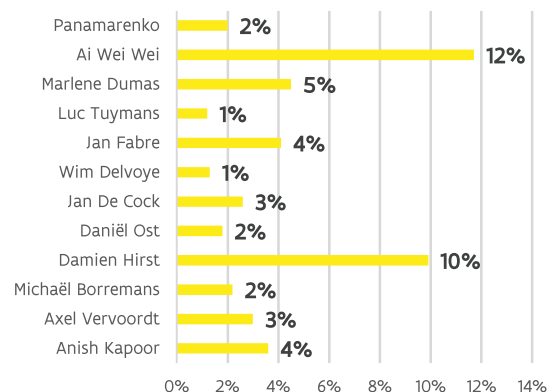
A painter must be mentioned at least 20 times before he will appear in the word cloud.



## WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



## WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

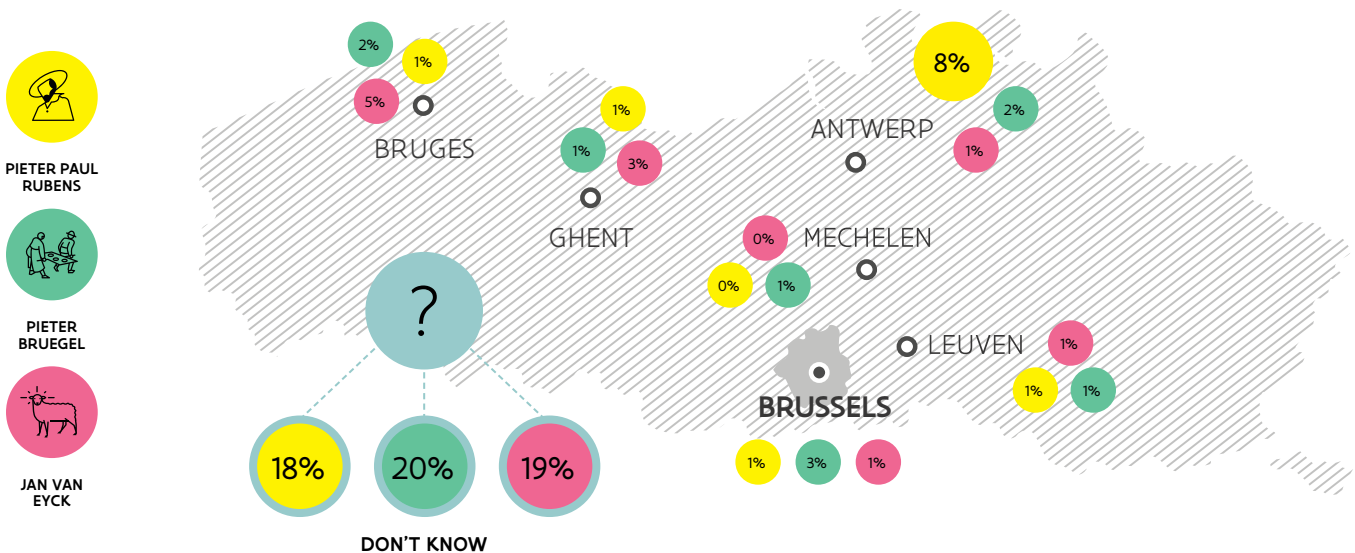


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=299)

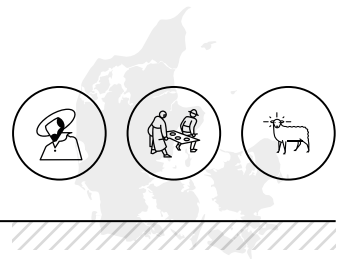


In Sweden, just as in the other Scandinavian countries, knowledge about the painters is lower than average. 37% cannot name a single European painter. According to the Swedes, the following painters are the most important in Europe: Picasso, Da Vinci, Van Gogh, Rembrandt and Monet. Between 10 and 16% of the Swedes are familiar with Magritte, Van Eyck, Van Dyck or Bruegel. Only Rubens is known by more than a third of the Swedish people surveyed. Knowledge about contemporary painters is very low; no more than 5% are familiar

with the artists mentioned. Only Ai Wei Wei and Damien Hirst are known by more than 10% of Swedish people. In Sweden, 38% say they are familiar with the term 'Flemish Masters', and 3% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. They mainly associate this with famous painters from the Netherlands and Belgium, and with Rembrandt and Rubens. Only 30% of the Swedish respondents were asked to match the three Flemish

Masters with an art city. Less than 10% could actually match a Flemish Master with an art city. The most well-known link is that between Rubens and Antwerp (8%), followed by Van Eyck and Bruges (3%) and Bruegel and Brussels (3%). Van Eyck lived and painted in Bruges for a time. In Sweden, just as in almost every other country, the link between Van Eyck and Ghent is less well known despite the fact that the Ghent Altarpiece hangs in the St. Bavo Cathedral.

# DENMARK

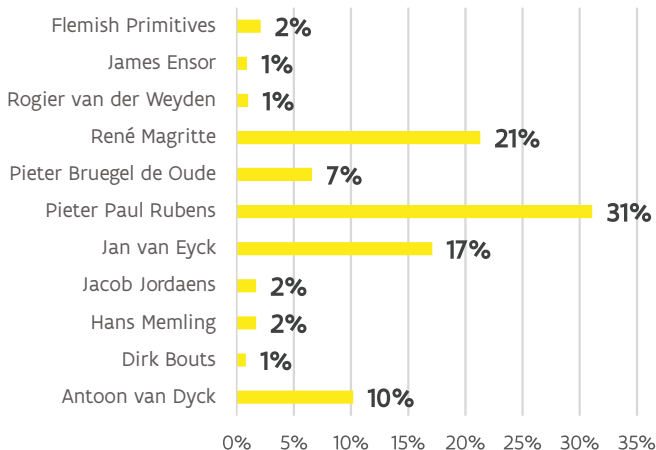


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

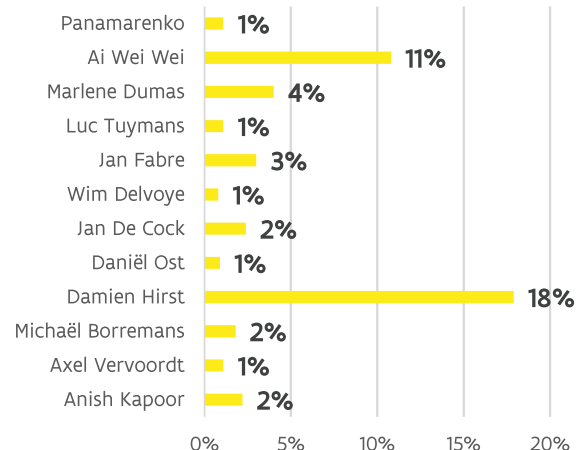
A painter must be mentioned at least 20 times before he will appear in the word cloud.



## WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



## WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

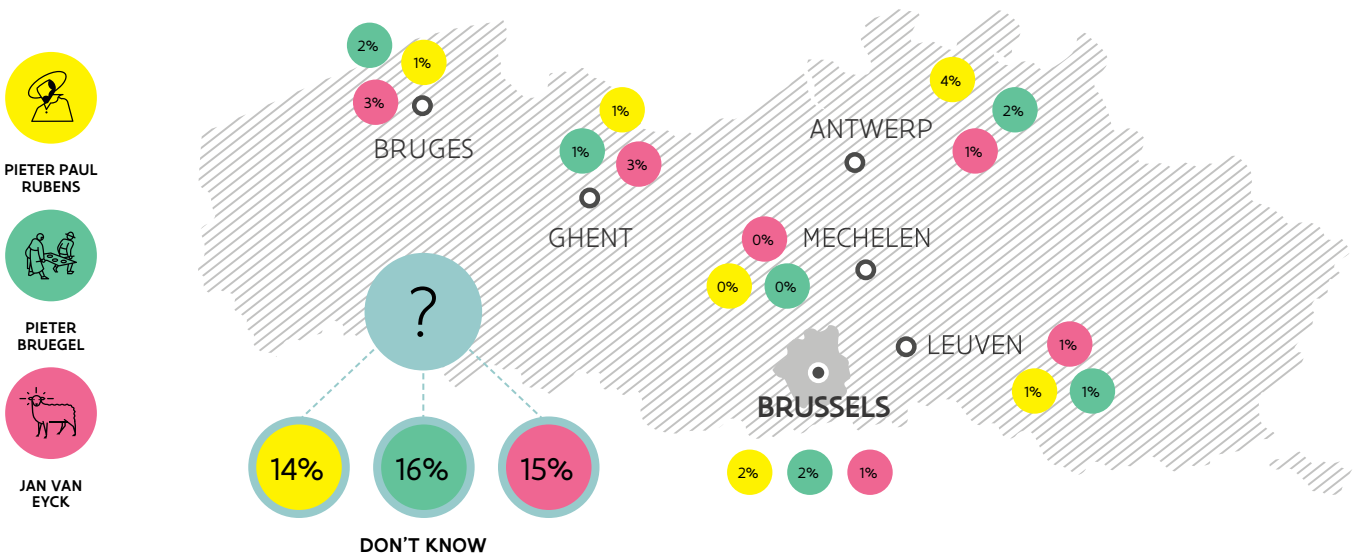


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=232)



In general, the Danes can name relatively few painters; 40% cannot name a single European painter. According to the Danes, the following painters are the most important in Europe: Picasso, Van Gogh, Monet, Da Vinci and Rembrandt. Regarding Flemish Masters, only 7% of Danes have heard of Bruegel, 17% have heard of Van Eyck and 31% have heard of Rubens. 21% of Danes are familiar with Magritte. As with a majority of countries, knowledge about

contemporary painters is limited overall. Less than 5% are familiar with the painters mentioned. However, more than 10% of the Danes are familiar with Damien Hirst and Ai Wei Wei.

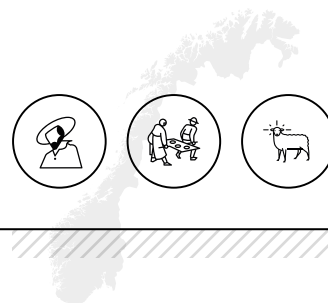
In Denmark, 26% say they are familiar with the term 'Flemish Masters', and 4% of the respondents associate this term with Flemish painters from the 15th to the 17th centuries. The term Flemish Masters is

mainly associated with painters from the Netherlands and Belgium.

Only 23% of Danish respondents were asked to match the three Flemish Masters with an art city. Less than 10% could actually match a Flemish Master with an art city. Only 4% associated Rubens with Antwerp; 3% associated Van Eyck with Bruges and 2% associated Bruegel with Brussels.



# NORWAY

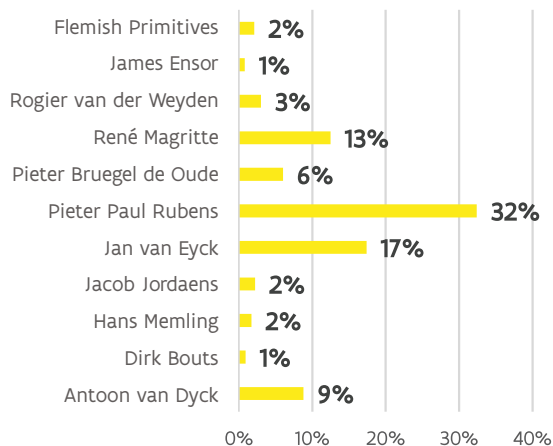


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

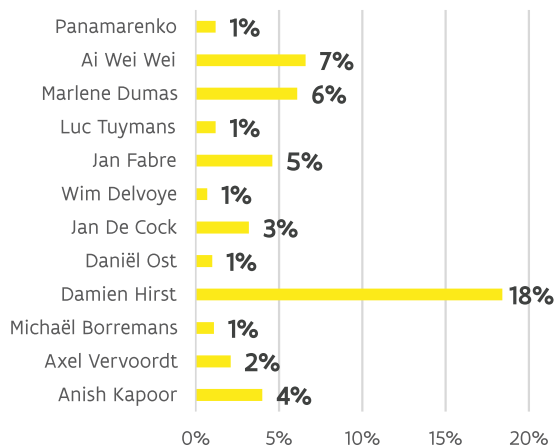
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

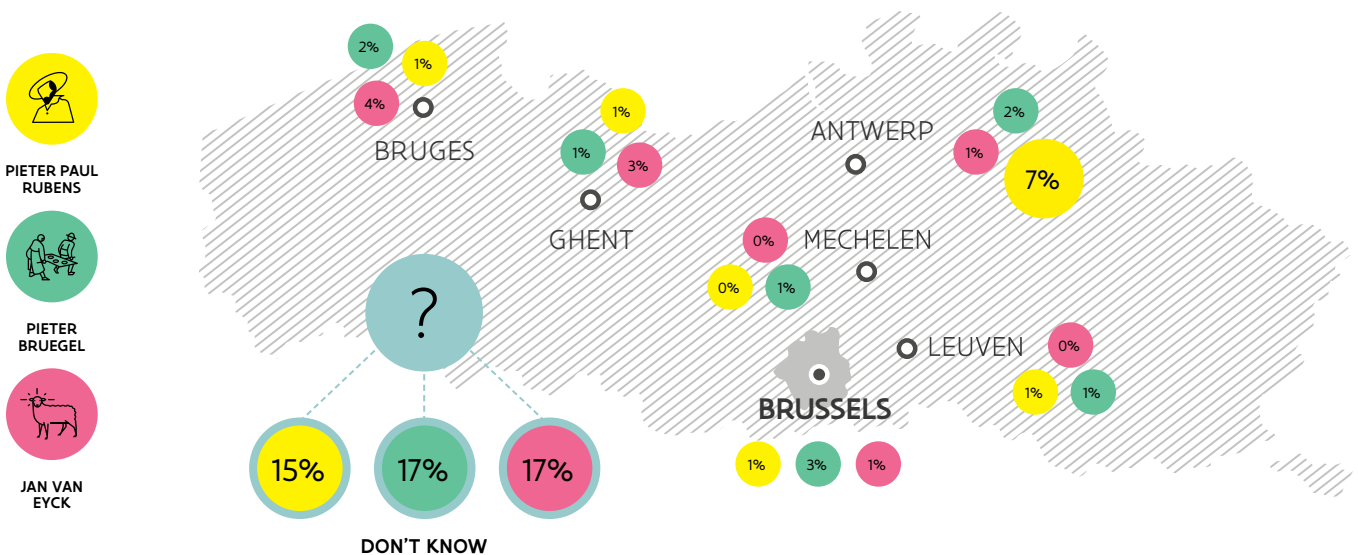


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=257)



In Norway, just as in the other Scandinavian countries, knowledge about painters is lower than the average of all countries surveyed. 26% of respondents cannot name a single European painter. The most important European painter is the Norwegian painter Munch. Other frequently mentioned European painters are: Van Gogh, Picasso, Da Vinci, and Rembrandt. Of the Flemish Masters, Rubens is the most well known. 17% have heard of Van Eyck, but only 6% have heard of Bruegel. Most contemporary

painters are fairly unknown (less than 10% say they have heard of them). Only Damien Hirst is more well known (18%).

In Norway, 43% say they are familiar with the term 'Flemish Masters', and 3% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. The term Flemish Masters is mainly associated with painters from the Netherlands and Belgium.

25% of the Norwegian respondents were asked to match the three Flemish Masters with an art city. Less than 10% could actually match the Flemish Masters with an art city. 7% of Norwegians associated Rubens with Antwerp; 4% Van Eyck with Bruges and 3% Bruegel with Brussels. Van Eyck lived and painted in Bruges for a time. In Norway, as in almost all the other countries, the connection between Van Eyck and Ghent is less well known, despite the Ghent Altarpiece hanging in the Saint Bavo Cathedral.

# RUSSIA

ONLY RESPONDENTS FROM  
MOSCOW AND ST.-PETERSBURG

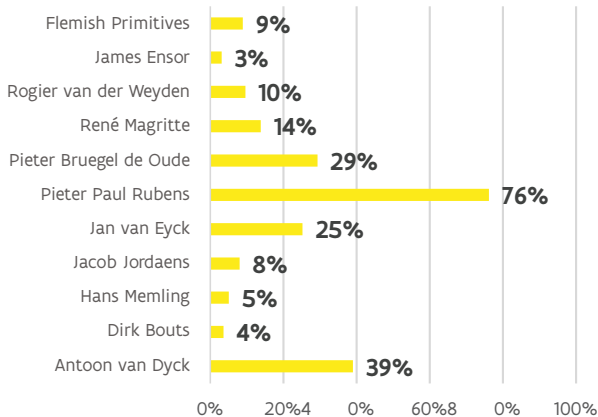


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

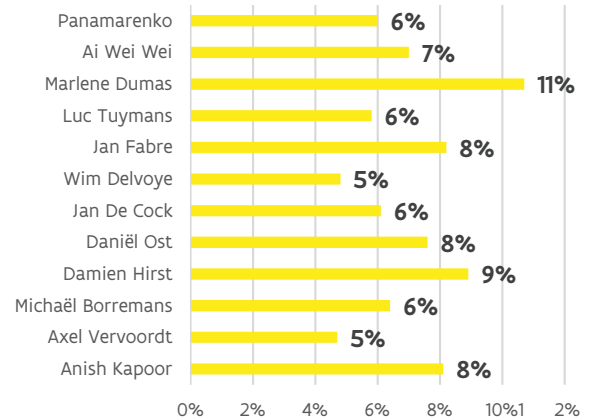
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

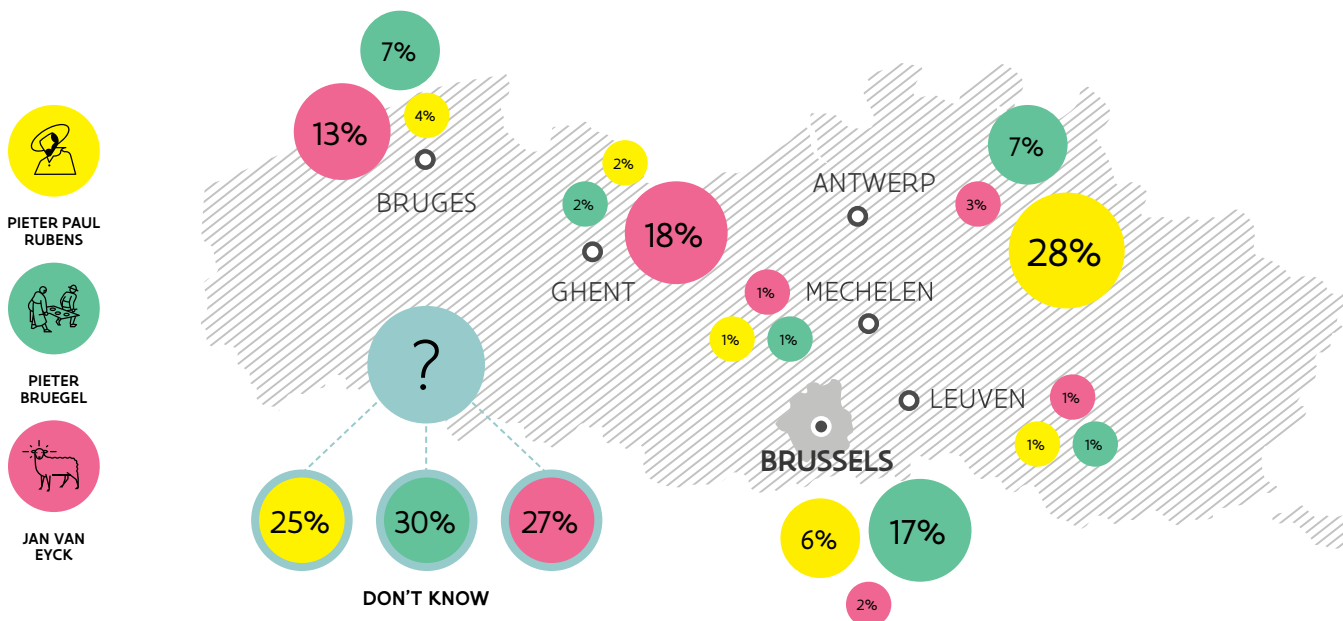


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=658)



Russians are familiar with many European painters. 93% can name at least one European painter. According to the Russians, the 5 most important painters are: Van Gogh, Da Vinci, Picasso, Rembrandt and Dali. The Russians are familiar with many Belgian painters. Most well known is Rubens, 76% of the Russians say they have heard of him. But even Van Dyck, Bruegel and Van Eyck are very well known, more than a quarter of Russian respondents say they are familiar

with them. The contemporary artists are far less known. Marlene Dumas (11%) is the most famous female artist.

In Russia, 74% say they are familiar with the term 'Flemish Masters', 16% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. Of all the people surveyed, the Russians are most aware of what the term 'Flemish Masters' means. The term Flemish Masters is associated with artists,

Renaissance, realism and various Flemish artists, including Rubens and Van Dyck.

66% of Russian respondents were asked to match the three Flemish Masters with an art city. More than 35% could actually match the Flemish Masters with an art city. Almost 30% associated Rubens with Antwerp; 18% Van Eyck with Bruges and 17% Bruegel with Brussels (17%). Russia is one of the few areas where Van Eyck is associated more often with Ghent than Bruges.

# JAPAN

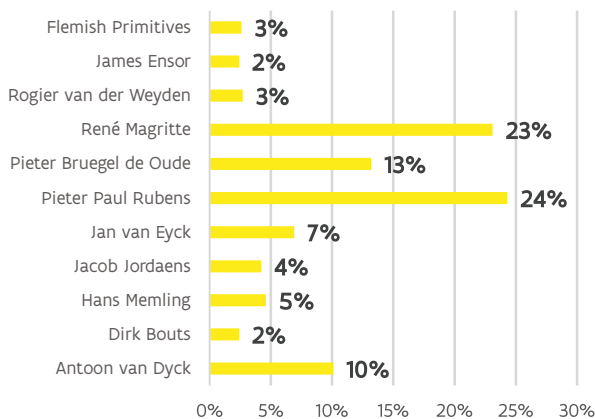


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

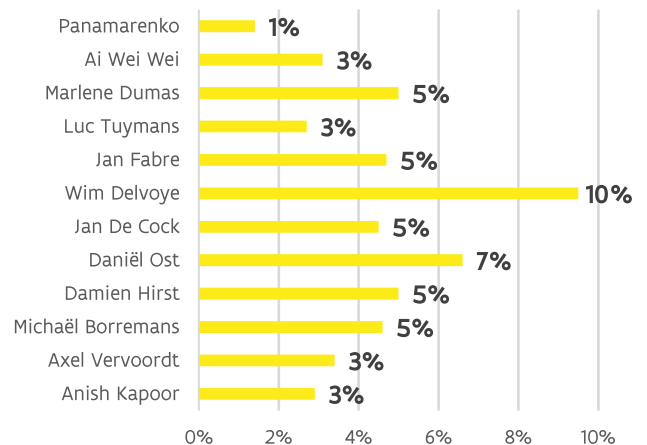
A painter must be mentioned at least 20 times before he will appear in the word cloud.



## WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



## WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

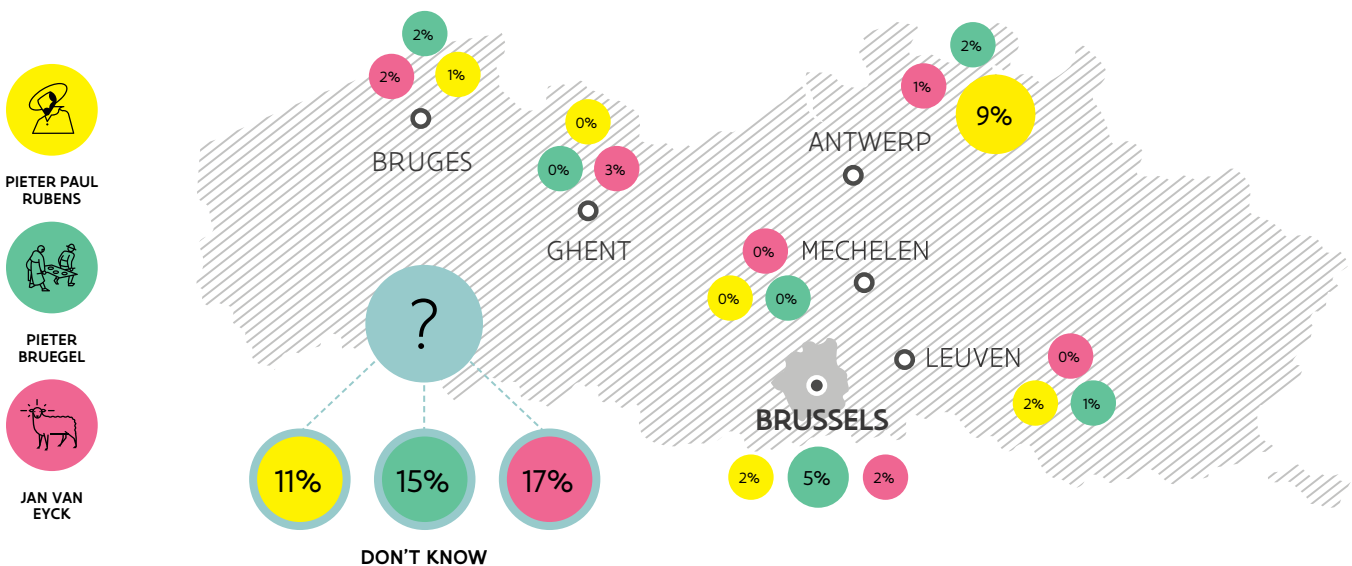


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.

**RUBENS** SCHOOL  
REMBRANDT  
ANTWERP  
FAMOUS FLANDERS MUSIC  
**BELGIUM** BRUEGEL

### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=245)



85% of the Japanese can name at least one European painter. According to them, the 5 most important European painters are: Van Gogh, Picasso, Monet, Da Vinci and Renoir. Most Belgian painters are relatively unknown. Rubens is the most well known, followed by Magritte. Knowledge about contemporary painters is rather limited, just as in most countries. The most well-known countries artist is Wim Delvoye. It is also striking that 7%

of the Japanese say they are familiar with Daniel Ost (he is a renowned floral designer in Japan).

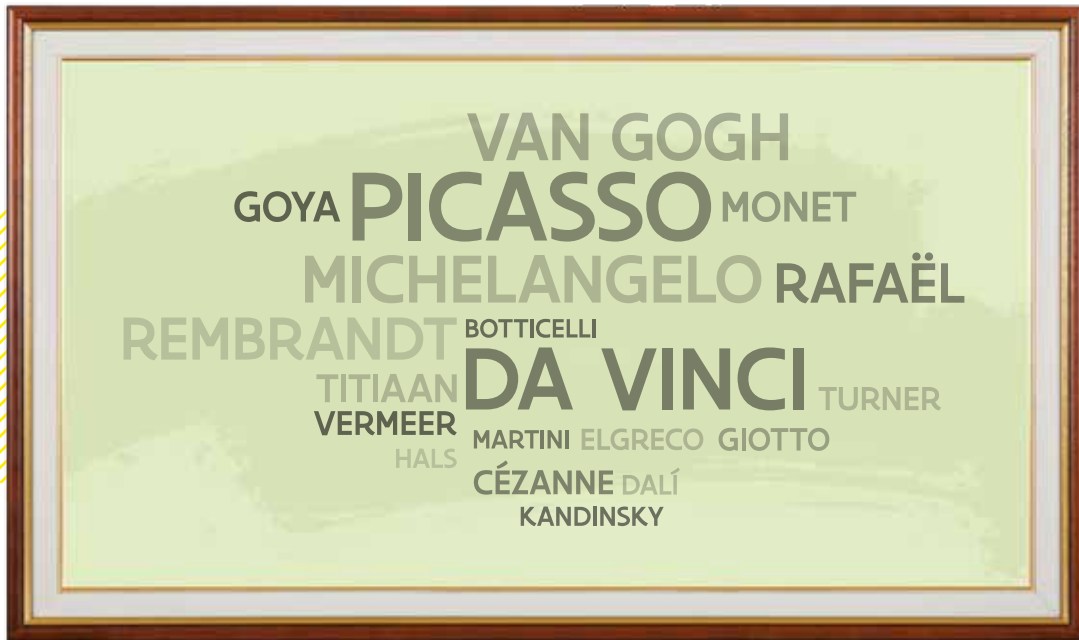
In Japan, only 21% say they are familiar with the term 'Flemish Masters', and 3% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. The term Flemish Masters is clearly associated with Rubens, Belgium, Flanders and Antwerp.

A quarter of Japanese respondents answered the request to match the three Flemish Masters with an art city. Less than 10% could actually match a Flemish Master with an art city. 9% associated Rubens with Antwerp; 3% Van Eyck with Ghent and 5% Bruegel with Brussels.

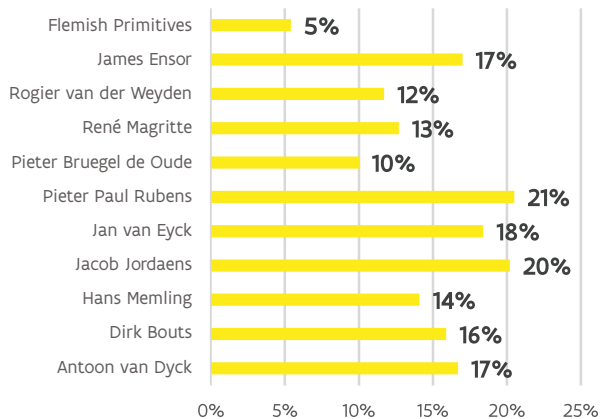


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

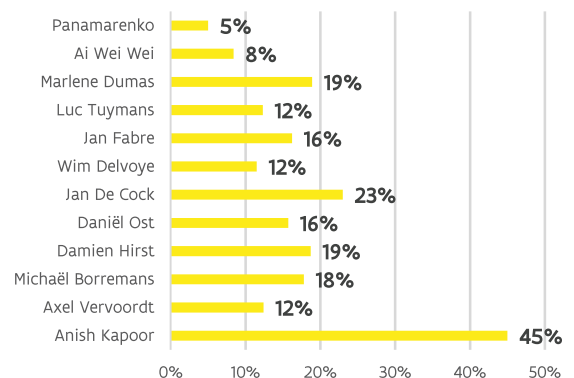
A painter must be mentioned at least 20 times before he will appear in the word cloud.



## WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



## WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

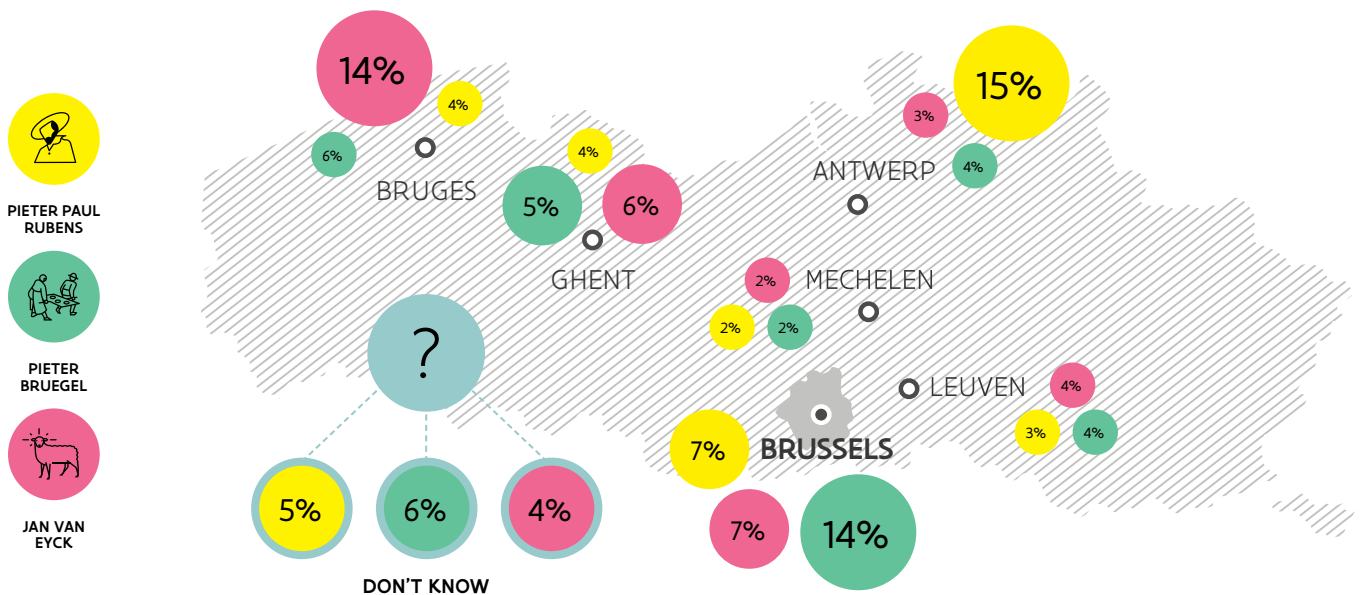


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=398)



The results for the Indians regarding well-known painters are rather dubious. On the one hand we suspect that they often used a search engine to answer the questions and, on the other hand, that they provided more socially acceptable answers. Despite the fact that 27% of the respondents in India could not name a single European painter, the other respondents named many and, in particular, different painters. So it is important to be cautious when interpreting the Indian results.

For India, the 5 most important European painters are: Picasso, Da Vinci, Van Gogh, Michelangelo and Rembrandt. Most Belgian

painters are known to less than one fifth of Indians. The most well-known painters are Jacob Jordaens (20%) and Rubens (21%). Knowledge about contemporary painters is high in comparison to other countries. 45% say they are familiar with Anish Kapoor, who was born in India.

In India, 47% say they are familiar with the term 'Flemish Masters', but only 2% of the respondents associate this term with Flemish painters from the 15th to the 17th centuries. The term Flemish Masters is mainly associated with oil paint, a technique used by the Flemish Masters.

40% of Indian respondents were asked to match the three Flemish Masters with an art city; 35% could actually match the Flemish Masters with an art city. 15% associated Rubens with Antwerp; 14% Van Eyck with Bruges and 14% Bruegel with Brussels. Van Eyck lived and painted in Bruges for a time. In India, as in almost all the other countries, the connection between Van Eyck and Ghent is less well known, despite the Ghent Altarpiece that hangs in the St. Bavo Cathedral.



# CHINA

ONLY RESPONDENTS FROM TIER-1 TOWNS LIKE PEKING, SHANGAI, GUANGZHOU AND SHENZHEN.

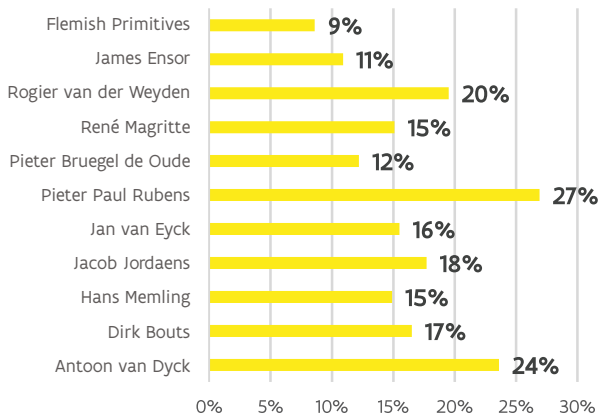


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

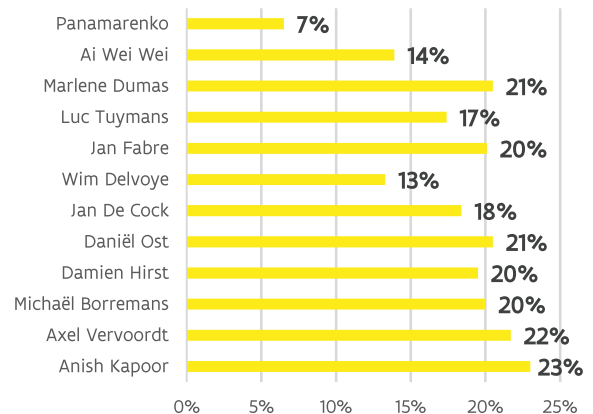
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

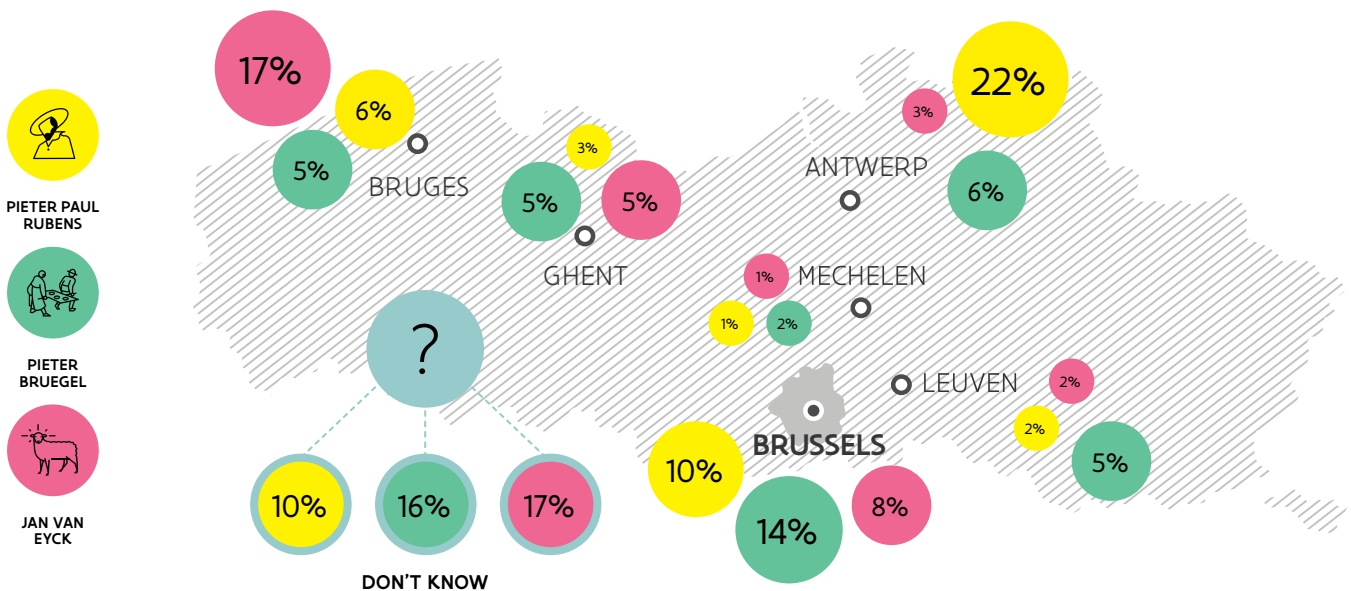


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



## MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=528)



The results for the Chinese regarding well-known painters are rather dubious. On the one hand we suspect that they often used a search engine to answer the questions and, on the other hand, that they provided more socially acceptable answers. For example, 93% of Chinese people can easily name at least one European painter. They also name very many and especially different painters. So it is important to be cautious when interpreting the Chinese results.

According to the Chinese, the five most important European painters are: Da Vinci, Van Gogh, Picasso, Monet and Michelangelo. Most of the Belgian painters are less well-

known. Less than one in five of Chinese people have heard of Bruegel or Van Eyck. The most well known painters are Van Dyck (24%) and Rubens (27%). Knowledge about contemporary painters is high in comparison to other countries. Almost all painters are known to one in five of the Chinese people surveyed.

In China, 46% say they are familiar with the term 'Flemish Masters', but only 1% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. Chinese people associate the term Flemish Masters with realism, humour, classical and abstract.

53% of the Chinese respondents were asked to match the three Flemish Masters with an art city. A little more than 30% could actually match the Flemish Masters with an art city. 22% associated Rubens with Antwerp; 17% Van Eyck with Bruges and 14% Bruegel with Brussels. In most countries Van Eyck is associated with Bruges, probably because he lived and painted there for a season. In most countries the link between Van Eyck and Ghent is less well known despite the fact that the Ghent Altarpiece hangs in the St. Bavo Cathedral.

# UNITED STATES

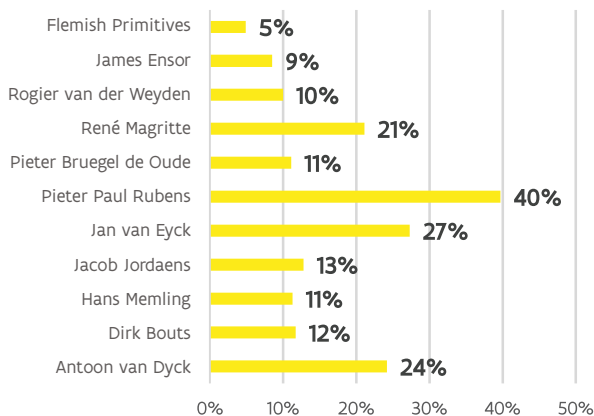


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

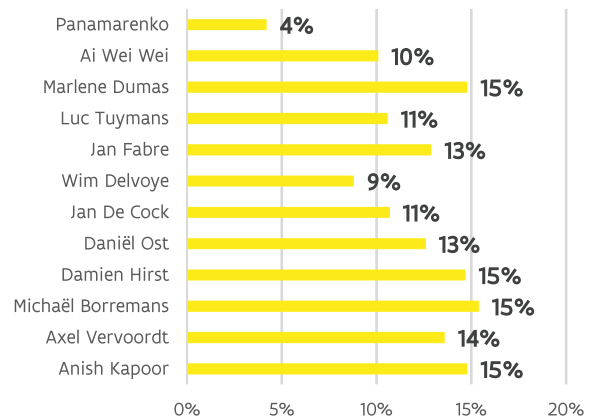
A painter must be mentioned at least 20 times before he will appear in the word cloud.



### WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



### WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

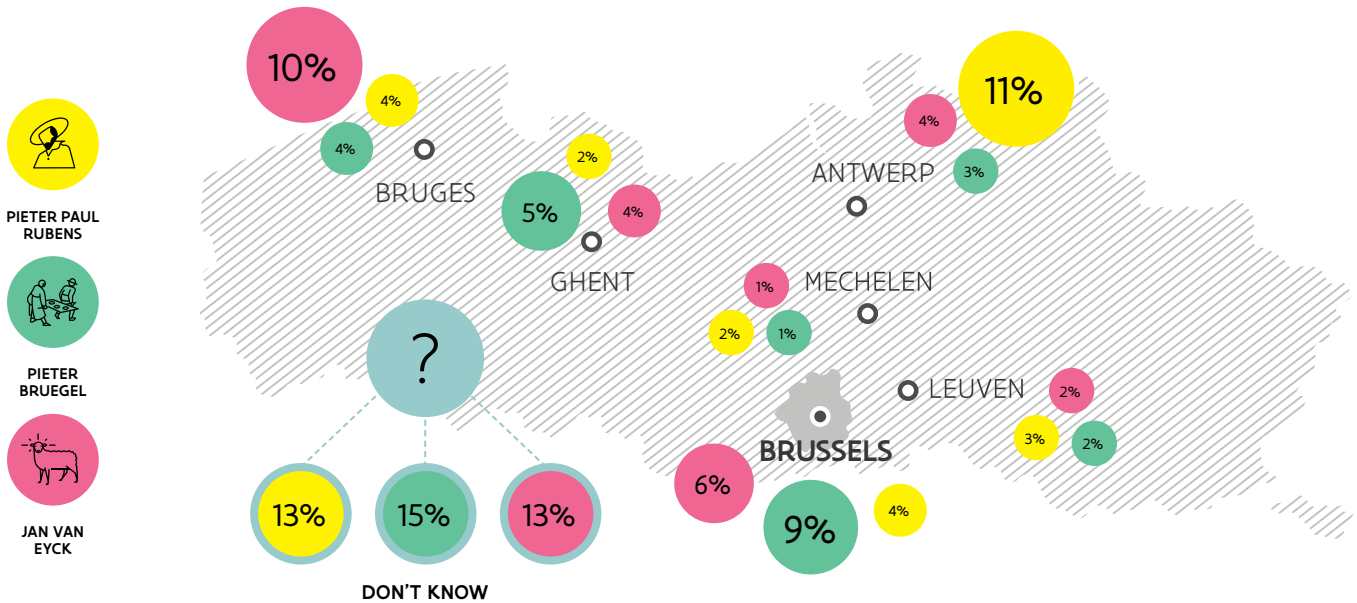


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=388)



In the United States knowledge about the painters is lower than average. 32% of respondents cannot name a single European painter. American people name the following 5 painters as being the most important ones from Europe: Picasso, Van Gogh, Da Vinci, Rembrandt and Monet. Familiarity with Belgian painters is not very high. Magritte, Van Dyck or Van Eyck are known to 20% to 25% of those surveyed. Four in ten Americans say they are familiar with Rubens. Knowledge about

contemporary painters is quite high in comparison to European participants.

In the United States, 49% say they are familiar with the term 'Flemish Masters', but only 3% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. They mainly associate this term with famous artists.

Almost 40% of the American respondents were asked to match the three Flemish

Masters with an art city. More than 35% could actually match a Flemish Masters with an art city. 11% associated Rubens with Antwerp, 10% Van Eyck with Bruges (10%) and 9% Bruegel with Brussels. In most countries Van Eyck is associated with Bruges, probably because he lived and painted there for a season. The link between Van Eyck and Ghent is less well known in the United States despite the fact that the Ghent Altarpiece hangs in the St. Bavo Cathedral.

# BRAZIL

ONLY RESPONDENTS FROM  
RIO DE JANEIRO AND SAO PAULO.

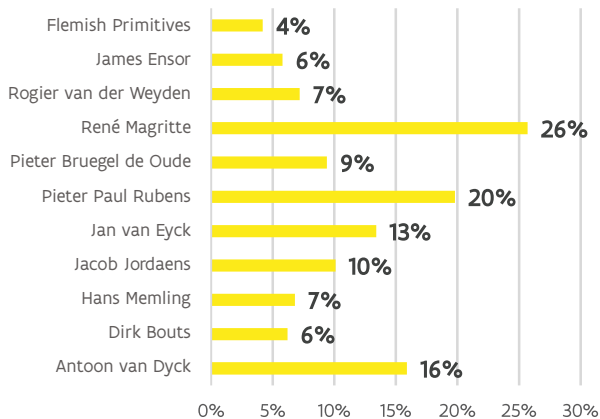


## IN YOUR OPINION, WHO ARE THE FIVE MOST IMPORTANT PAINTERS IN EUROPE?

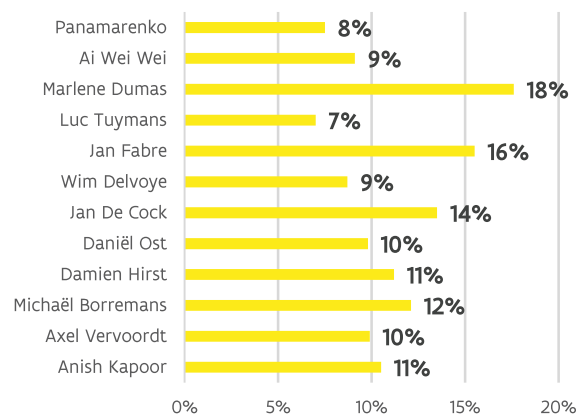
A painter must be mentioned at least 20 times before he will appear in the word cloud.



## WHICH OF THE FOLLOWING PAINTERS DO YOU KNOW?



## WHICH OF THE FOLLOWING CONTEMPORARY ARTISTS DO YOU KNOW?

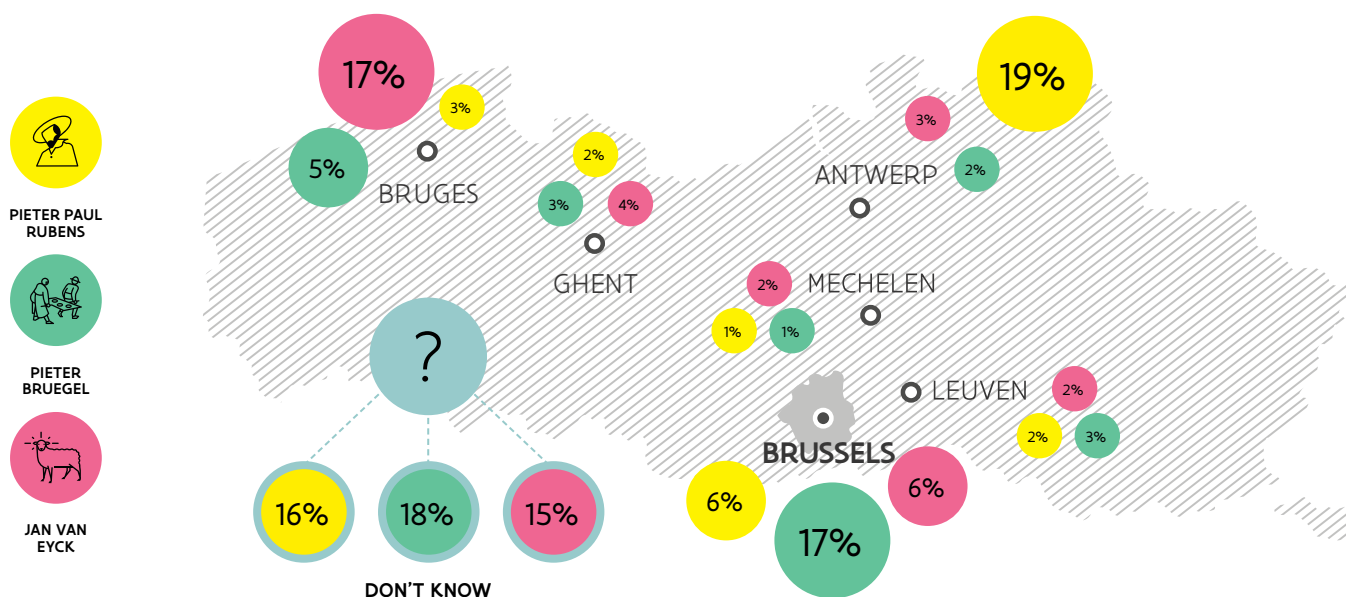


## WHAT DOES THE TERM 'FLEMISH MASTERS' MEAN TO YOU?

A term must appear at least five times to be included in the word cloud.



### MATCH THESE ARTISTS WITH AN ART CITY IN FLANDERS (BELGIUM) (n=485)



The Brazilian results regarding well-known painters are rather dubious. On the one hand we suspect that they often used a search engine to answer the questions and, on the other hand, that they provided more socially acceptable answers. For example, 93% of Brazilians can easily name at least one European painter. So it is important to be cautious when interpreting the Brazilian results.

According to Brazilians, the 5 most important European painters are: Picasso, Van Gogh, Da Vinci, Michelangelo and Dali. Historical Belgian painters are generally less

well known. Only Rubens and Magritte are mentioned as being well known by one fifth to one fourth of those responding. When compared to the European territories, Brazilian people are fairly familiar with contemporary painters. For Brazilians, Marlene Dumas (18%) is the most famous artist, followed by Jan Fabre (16%).

In Brazil, 53% say they are familiar with the term 'Flemish Masters', while only 7% of the respondents associate this term with the Flemish painters from the 15th to the 17th centuries. They mainly associate this term with painters and the Renaissance.

Almost half of Brazilian respondents were asked to match the three Flemish Masters with an art city; and slightly more than 30% also could actually match a Flemish Masters with an art city. 19% associated Rubens with Antwerp; 17% Van Eyck with Bruges and 17% Bruegel with Brussels. In most countries Van Eyck is associated with Bruges, because he lived and painted there for a season. The link between Van Eyck and Ghent is less well known in the United States despite the fact that the Ghent Altarpiece hangs in the St. Bavo Cathedral.

## Verantwoordelijke uitgever

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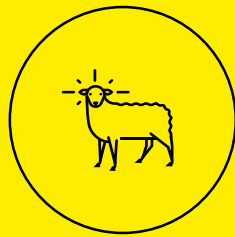
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