

# Belgium

## Tourism in the economy

In Belgium, tourism is an exclusive competency of the three regions: Flanders, Wallonia and Brussels. This section provides a national overview of tourism in the country, as does the statistical annex, followed by presentations of the governance and policy initiatives of the Flanders Region and Wallonia.

In 2016, Belgium received 5.6 million international tourists who stayed in hotels and similar establishments, spending a total of 10.2 million nights. Of this figure 49.2% (2.7 million) visited Flanders, 37.8% (2.1 million) the city of Brussels and 13% (720 000) Wallonia. The leading foreign markets for Belgium are the Netherlands, France, the United Kingdom, and Germany, together accounting for 57% of arrivals.

Belgium domestic overnight visitors totalled 4.3 million in 2016, of whom 59.9% visited Flanders, 25.5% Wallonia and 14.7% Brussels. A total of 7 million nights were spent in hotels and similar establishments, with Flanders again accounting for around 60% of the total.

Outbound overnight trips from Belgium increased by 26.2% to 15.8 million in 2016. Of these trips, 58.7% originated in Flanders, 26.8% in Wallonia and 14.6% in Brussels.

In 2016, international travel receipts amounted to EUR 10.7 billion or 2.6% of total exports for Belgium.

## FLANDERS REGION

### Tourism governance and funding

In Flanders, tourism is the responsibility of the Minister for Public Works, Mobility, the Vlaamse Rand, Tourism and Animal Protection.

The tourism unit of the Flemish Department of Foreign Affairs is responsible for tourism policy, international tourism relations.

VisitFlanders has the following objectives and functions:

- Investing in the sustainable development and promotion of Flanders and Brussels as a top tourist destination,
- Making specific investments and supplying support to make the Flanders tourism offer more attractive,
- Promoting Flanders as a tourist destination to attract more visitors,
- Making sure that everyone can enjoy and participate in a holiday, including people with disabilities or limited economic means, linking accessibility and quality,

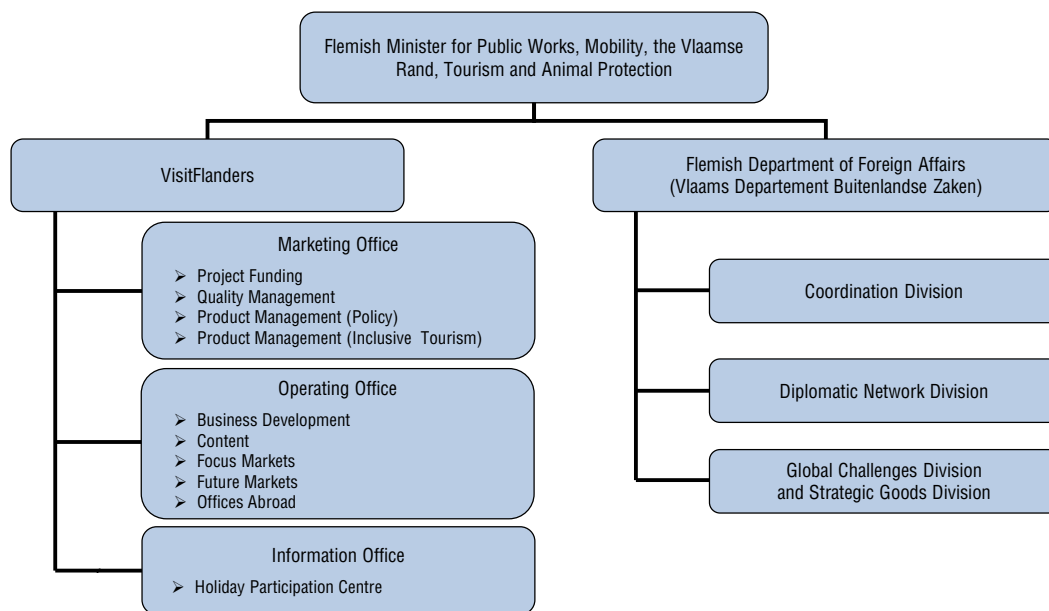
- Stimulating professionalism in the tourist sector in order to guarantee all visitors a quality offer and experience,
- Recognition of tourism accommodation providers.

The provinces and local authorities invest in the domestic promotion of Flanders.

Close co-operation between VisitFlanders and the main actors of the private sector (*Horeca Vlaanderen*, Brussels Airport, Recread, CiB, *Logeren Vlaanderen*, rail authority NMBS) is realised via the Advisory Committee of VisitFlanders and in the “Tourism Pact 2020”, which is subscribed to by the most relevant public and private tourism stakeholders in Flanders.

In 2017 the overall budget for VisitFlanders was EUR 68.1 million.

### Belgium, Flanders region: Organisational chart of tourism bodies



Source: OECD, adapted from the Flemish Department of Foreign Affairs, 2018.

## Tourism policies and programmes

Tourism policy in Flanders has three overall priorities:

- Increase the attractiveness and promote Flanders as a destination. The approach is to focus on distinctive features of Flanders, including treasures such as The Flemish Masters and local gastronomy. Individual destinations, including the Brussels region, are supported through investment in promotion, events, infrastructure and accessibility.
- Support businesses and a vibrant tourism sector. Priorities include: a streamlined quality policy, addressing competitiveness in the accommodation sector and implementing a hotel and catering industry policy plan; product development such as cycling and walking networks; and financial support provided by the Government. Since 2013, specific attention has been given to tourism as a main driver of economic growth for the province of Limburg, with public support provided for tourism projects such as those creating value from coal mining heritage.
- Make tourism available to all Flemings. This includes work in three areas: making Flanders a leading family-friendly heritage destination; expanding the Holiday Participation

Centre (*Steunpunt Vakantieparticipatie*) as a leading reference point for people with budgetary and care needs; and providing a range of high quality accommodation for a range of disadvantaged groups.

Specific measures designed to address challenges facing the tourism industry in Flanders include:

- Development and promotion of themes within the Flanders brand, such as gastronomy, Flanders' Masters, and commemoration of World War I,
- Renewal of the "Tourism for All" Act,
- Implementation of a new "Tourism Accommodation" Act, with the Hotelstars Union quality label,
- Development and implementation of "Event Flanders",
- Continuous investment in research with an update of the Flanders Tourism Satellite Account,
- Continued delivery of the KOALA-project, supporting tourism businesses in initiatives in the area of climate care and energy efficiency,
- Developing professional qualifications in close co-operation with private public tourism stakeholders and the Flanders Department of Education.

## WALLONIA

### Tourism governance and funding

In Wallonia, tourism is the responsibility of the Minister of Agriculture, Nature, Rurality, Tourism, Heritage and Delegate to the Greater Region.

The Tourism Department of Wallonia is composed of the Walloon Ministry of tourism (CGT) and Wallonia-Belgium Tourism (WBT).

The CGT is responsible for Walloon tourism policy and international tourism relations, including:

- Handling applications for certification and labelling (tourism accommodation and attractions, tourist information and guides), stimulating professionalism in the tourist sector in order to guarantee all visitors a quality offer and experience,
- Providing subsidies to make the Walloon tourism offer more attractive,
- Being responsible for monitoring and statistical analysis,
- Managing publicly owned tourism infrastructure in Wallonia.

Since the Sixth State reform, which came into force in 2017 and introduced regionalisation of tourism, promotional activities were placed under the exclusive control of *Wallonia-Belgium Tourism* (WBT).

The CGT and WBT work closely together with professional organisations in the sector – such as *Gîtes de Wallonie*, *Accueil Champêtre en Wallonie*, *Walcamp* (camping sites), *Vilvac* (holiday villages), *Auberges de Jeunesse* (youth hostels), *Attractions et Tourisme*, *Musées et Société en Wallonie*, and *Horeca Wallonie* – to develop creative and innovative tourism policies to meet the needs of industry stakeholders.

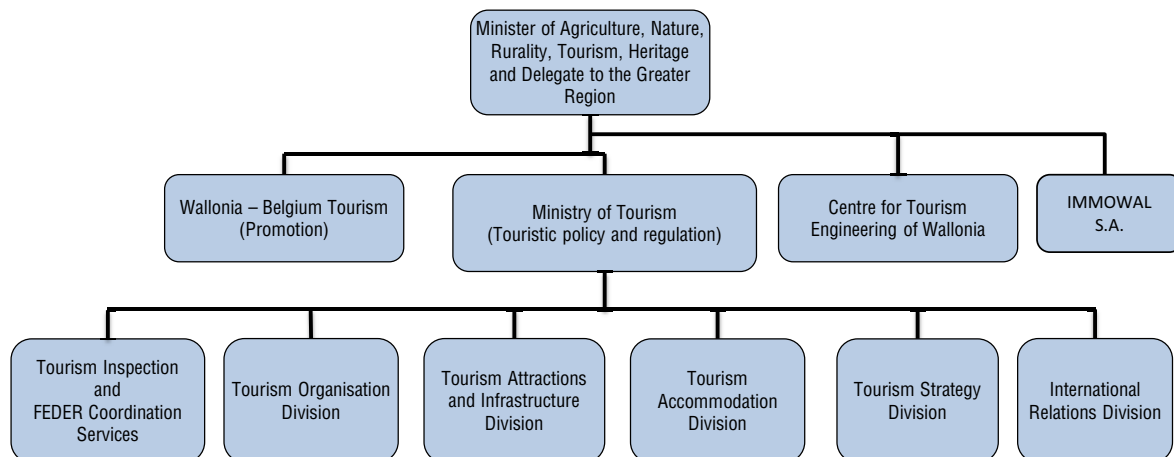
The Centre for Tourism Engineering of Wallonia (CITW) is a joint economic and tourism undertaking between Walloon municipalities active in the sector. In liaison with

the CGT and with support from European Regional Development Funding, it organises and implements tourism engineering policies that pool responsibilities and coordinate actions across Wallonia, as well as supervising research carried out by specialist consultants.

Immowal has recently been established as a public limited company whose sole shareholder is the CGT. It was set up in order to support economic activity and competitiveness of Wallonia's tourism industry. It is charged with developing two or three new 'tourist resorts' in Wallonia by converting government property or, if necessary, by purchasing the required sites in strategic locations; and restructuring the CGT's property portfolio in order to free up resources or provide additional revenue for new tourism projects. Immowal collaborates actively with the CITW.

The CGT budget for 2017 amounts to around EUR 63 million, not including funding for projects co-financed by the EU.

### Belgium, Wallonia: Organisational chart of tourism bodies



Source: OECD, adapted from the General Tourism Commission of Wallonia, 2018.

## Tourism policies and programmes

The Regional Policy Declaration for 2014-2019 recommended focusing on two tourism objectives:

- Creating an outstanding tourist destination. The approach involves building on the region's key strengths, including natural and heritage sites, gastronomy and major events and anniversaries. Priorities include reviewing the tourism strategy, developing commercial packages for specific markets, and improving the quality of hospitality, services and products. Another priority is to address accessibility at the main tourism sites in terms of opening hours, languages spoken, access for people with reduced mobility, and those arriving by public transport etc.
- Maximising capacity and resources to support tourism. Priorities include: involving professional associations in implementing tourism policy; improving the training of tourism personnel; improving financial tools; adopting a more cohesive regional development policy; creating two or three new resorts using public-private partnerships to develop and enhance government-owned assets; developing high performance statistical tools; simplifying standards for tourist establishments, redirected towards quality, accessibility and security; simplifying the institutional organisation of tourism;

restructuring and streamlining the Wallonia-Belgium Tourism Bureau (through the Sixth State reform which confers more responsibility for tourism to the regions).

In order to obtain an objective and comprehensive measure of the economic impact of tourism in Wallonia and to inform decision making, the CGT is working with others to improve and update the socio-economic data available and to develop new instruments, such as sectoral analysis of accommodation and attractions, and customer surveys. Particular attention is being paid to accommodation, especially the hotel sector, as this represents the main source of tourism income.

At the end of 2016, the government of Wallonia approved the first CGT administration contract, which sets out changes for the coordination of the CGT, and four strategic objectives for implementation starting in 2017. The objectives are: i) developing a sustainable, innovative and high-quality professional tourist sector, establishing the added value of the CGT as the go-to platform for service providers; ii) taking account of the transversal nature of tourism in management of partnerships and networks; iii) enhancing the coordination and governance of the CGT; and iv) deploying a modern, fit-for-purpose policy for the management of human resources.

The Walloon Tourism Code (CWT), which dates back to 2009, structures and regulates the region's tourism activities (organisations, attractions and all forms of accommodation). It became necessary to update the legislation to address new developments and expectations on the part of both tourism professionals and tourists themselves. The review process, which included consultation with industry, had the following aims:

- Identifying, restructuring and clarifying the roles of the various players in the tourism industry,
- Allocating sufficient financial resources to high-quality tourism experiences in order to promote and encourage centres of job creation,
- Responding to the emergence of collaborative platforms.

The revised Tourism Code came into force in 2017. It reorganises tourist information centres, the *Maisons du Tourisme*, in order to establish a coherent mass-market tourist service while generating economies of scale. Communication and promotional resources will be concentrated on a reduced number of *Maisons du Tourisme* (down from 42 to 28).

## Statistical profile

Table 1. **Belgium: Domestic, inbound and outbound tourism**

	2012	2013	2014	2015	2016
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	3 806	3 947	4 175	4 304	4 326
Brussels	634	665	702	676	634
Flanders	2 188	2 277	2 420	2 582	2 590
Wallonia	983	1 005	1 053	1 046	1 102
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	6 328	6 525	6 926	7 048	6 968
Brussels	1 111	1 163	1 232	1 182	1 030
Flanders	3 674	3 798	4 032	4 260	4 240
Wallonia	1 543	1 564	1 661	1 607	1 698
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	6 146	6 228	6 389	6 440	5 557
Brussels	2 382	2 450	2 546	2 534	2 101
Flanders	2 955	2 969	3 051	3 107	2 736
Wallonia	809	809	791	799	720
Same-day visitors (excursionists)	..	..	..	..	..
Top markets for Belgium					
Netherlands	1 175	1 093	1 053	1 044	966
France	985	1 008	1 007	957	883
United Kingdom	813	848	880	873	702
Germany	637	658	667	698	614
United States	309	306	343	362	275
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	11 546	11 624	12 082	12 035	10 215
Brussels	4 593	4 772	5 058	4 987	3 962
Flanders	5 554	5 509	5 647	5 711	5 023
Wallonia	1 399	1 344	1 377	1 337	1 230
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	11 157	12 550	13 272	12 499	15 773
Brussels	1 690	1 848	2 226	1 879	2 295
Flanders	6 088	6 910	7 256	7 344	9 253
Wallonia	3 379	3 792	3 790	3 277	4 225
Same-day visitors (excursionists)	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	10 681	10 939	11 477	11 799	10 695 p
International travel receipts	9 743	10 073	10 485	10 788	10 695 p
International passenger transport receipts	938	866	992	1 011	..
<b>Outbound tourism</b>					
Total international expenditure	17 473	18 463	19 909	19 041	17 689 p
International travel expenditure	15 768	16 692	17 937	17 066	17 689 p
International passenger transport expenditure	1 705	1 771	1 972	1 975	..

.. Not available; | Break in series; p Provisional data

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933639645>

Table 2. **Belgium: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed				
	2016	2012	2013	2014	2015	2016
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	..	..	..	..	..	..
Accommodation services for visitors	8 210	..	..	..	..	..
Brussels	282	..	..	..	..	..
Flanders	4 698	..	..	..	..	..
Wallonia	3 230	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	..	..	..	..	..	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	..	..	..	..	..	..
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

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