



## Belgium



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# 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 and Walloon regions.

In 2012, Belgium received a record 6.2 million international visitors in hotels and similar establishments, of whom 48% (3.0 million) visited Flanders, 13% (0.8 million) Wallonia and 39% (2.4 million) the city of Brussels. The number of foreign tourists to Belgium in 2012 increased by 0.2% overall on 2011. The leading foreign markets for Belgium are the Netherlands, France, the United Kingdom and Germany.

Belgium domestic visitors totalled 3.9 million in 2012, of whom 59% visited Flanders, 25% Wallonia and 16% Brussels.

Outbound overnight trips from Belgium fell by 2.7% to 11.2 million in 2012. Of these trips, 55% originated in Flanders, 30% in Wallonia and 15% in Brussels. The decline was confined to Flanders (-8.6%), while trips from Wallonia were up 2.5% and trips from Brussels rose by 11.9%. However, in the longer term, outbound travel from Wallonia has been rising a little more rapidly than that from Flanders and Brussels.

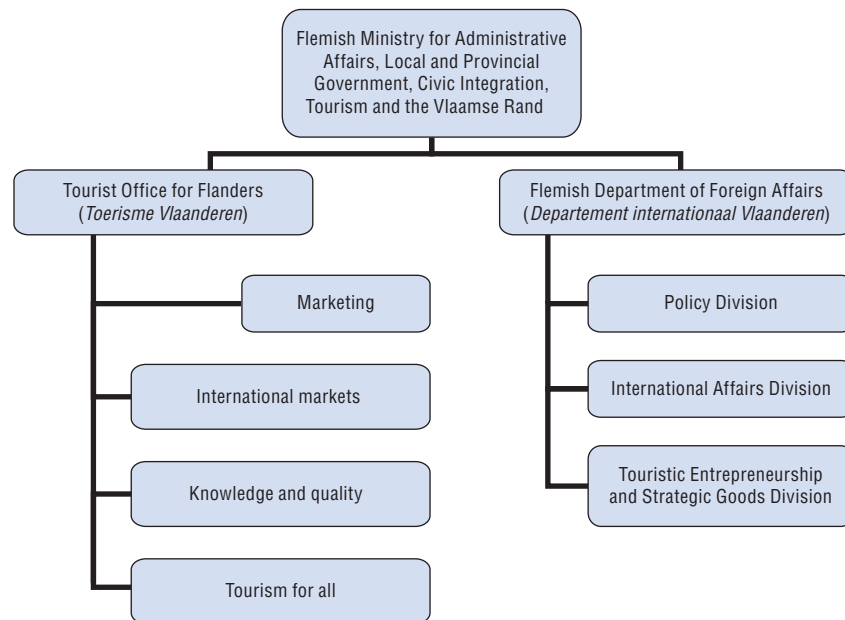
In 2012, 4 493 accommodation establishments were surveyed at the federal level, including 1 719 hotels, 475 campsites, 53 holiday villages, 1 391 “bed and breakfasts” and 855 establishments for group accommodation.

It is estimated that, in Flanders in 2010, 115 000 employees and 29 000 self-employed persons worked in the tourism recreational sector. In Brussels the industry had 38 000 employees and 2 750 independents in 2010. In Wallonia, tourism employs around 60 000 people.

## FLANDERS REGION

### Tourism organisation and governance

In Flanders, tourism comes under the Flemish Minister for Administrative Affairs, Local and Provincial Government, Civic Integration, Tourism and the Vlaamse Rand. At the administrative level, tourism is part of the portfolio of the Flemish Department of Foreign Affairs. The executive organisation for tourism administration, support and promotion is Toerisme Vlaanderen (Figure 1).

Figure 1. **Belgium, Flanders region: Organisational chart of tourism bodies**

Source: OECD, adapted from the Flemish Department of Foreign Affairs, 2014.

In 2010 the Flemish Minister for Tourism approved the restructuring of the tourist office *Toerisme Vlaanderen* – a restructuring which has now been completed. Some of the key changes are:

- *Toerisme Vlaanderen* acts as a centre for knowledge and innovation. It collects relevant knowledge and translates this to the practice of entrepreneurs and governments to stimulate innovation.
- Flanders is promoted on the basis of a strategic vision, taking into account the needs of the sector, the evolution of the markets and the evolution of marketing itself. “Cutting-edge craftsmanship” takes a central position in the branding of Flanders.
- All instruments to support or encourage the tourism industry (including all subsidies and financial support mechanisms) are brought together in the tourism office.
- The issuing of licences for travel agencies and tourist accommodation, and the classification, implementation and enforcement of regulations, have been moved to the Flemish Department of Foreign Affairs.
- *Toerisme Vlaanderen* has integrated its support services (accounting, staff, logistics, information and communications technology) in the management support organisation MOD DAR-iV of the Flemish government.
- The data systems of the Flemish Support Centre for Tourism and Recreation have been transferred to *Toerisme Vlaanderen*.

According to the 2011 federal agreement on the 6th Reform of the State, tourism is a competence of the regions instead of being a competence of the communities. However, the communities have maintained competences in the Brussels capital region in the field of promotion and investments in tourism infrastructure. This agreement requires legislative acts before implementation.

The 2011 Internal Reform of the State defines the new competences of the provinces in the field of tourism. The “White Paper” stipulates that the provinces can develop tourism initiatives except in the following areas: planning, research and data collection; marketing and product lines; and international inbound services and international marketing.

### **Tourism budgets**

The total tourism budget of the Flemish government in 2013 is EUR 61.8 million (policy credits).

### **Tourism-related policies and programmes**

Visit Flanders implements a regional strategy, mainly for the long-haul markets. The prime objective of the regional strategy is market exploration, so as to identify and capitalise on specific opportunities in new markets. The regional strategy offers a very cost-effective model to realise the goals of Flanders.

In the autumn of 2012, the Flemish government approved a new legislative framework for subsidies. The decision of the Flemish government will increase the effectiveness of the subsidies in the tourism sector. All projects will have to show that their activities contribute to the political priorities of the Flemish government and the strategic plan for Flanders-Brussels. For that reason, in addition to a financial justification, also a substantive justification is necessary for the use of the subsidies. This decision will also minimise the red tape and bureaucracy.

On 5 July 2012, the Flemish parliament modified the decree concerning the statute regulating travel agencies. The parliament opted for a phased approach. In a first phase, effective from 14 August 2012, the decree has been modified in a number of respects with immediate effect. These changes aim to increase legal certainty, clarify the exemptions for socio-cultural associations and reduce red tape. During this first phase, the sector can prepare itself for the second phase – the introduction of self-regulation on 1 January 2014, with the abolition of the decree and the regulation statute.

### **Statistics and performance evaluation**

The research centre of the Flemish government has developed a fully-fledged regional Tourism Satellite Account for the reference years 2008 and 2010. The TSA covers internal tourism consumption, domestic supply and internal tourism consumption and now employment. A simulated TSA was also prepared for the Brussels-Capital region. The intention is to prepare a limited annual update of the TSA and a more complete update every three years.

It was found that the gross value added (GVA) of the tourism industries in the Flemish region amounted to EUR 8.9 billion, or 4.8% of the total value added in the Flemish region in 2010. In the Brussels Capital region, the GVA of the tourism industries amounted to EUR 3.3 billion, or 5.6% of the total value added in the region.

### **For more information**

Flemish Department of Foreign Affairs  
Toerisme Vlaanderen  
Toerisme Vlaanderen (consumer websites)

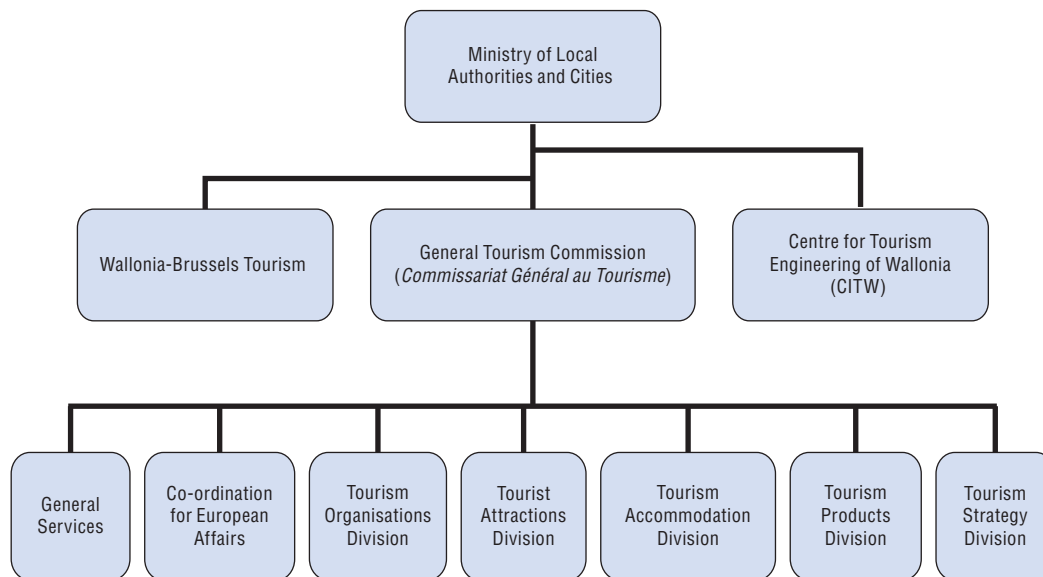
[www.vlaanderen.be/internationaal](http://www.vlaanderen.be/internationaal)  
[www.toerismevlaanderen.be](http://www.toerismevlaanderen.be)  
[www.visitflanders.be](http://www.visitflanders.be)

## WALLOON REGION

### Tourism organisation

The General Tourism Commission (CGT) is the agency responsible for implementing the Walloon government's overall tourism policy (Figure 2). The CGT implements the strategy for tourism (Destination 2015) and deals with all tourism-related matters associated with bodies and enterprises in the tourism industry, accommodation, development of products and infrastructure, and the economic observation of tourism in Wallonia.

Figure 2. **Belgium, Walloon Region: Organisational chart of tourism bodies**



Source: OECD, adapted from the Walloon General Tourism Commission, 2014.

The principal area of responsibility of Wallonia-Brussels Tourism (WBT) is to promote Wallonia and Brussels as destinations for tourism from Flanders and abroad. It aims to:

- Focus investment on source markets with high potential.
- Improve the image, reputation and renown of Wallonia as a destination, for example by working with other European destinations to conduct promotional campaigns in more distant markets.
- Develop innovation and improve the balance between supply and demand in the various markets. For example, WBT organises training to enhance market knowledge among providers of tourism services.
- Bring public and private investment together to promote Wallonia and its products as a destination for tourism.

Finally, with support from European funds, the Walloon Tourism Engineering Centre (*Centre d'ingénierie touristique de Wallonie, CIWT*), a joint economic and tourism development undertaking of Walloon municipalities, has been organising and implementing “tourism engineering policies” in Wallonia, pooling responsibilities and co-ordinating actions at the Walloon territorial level, as well as co-ordinating more generally the studies performed by specialist consultants.

A new dynamic has emerged in Wallonia in recent years, based on the principles of good governance. This movement is still young and has far to go, but the principles of good governance are being increasingly applied.

### Tourism budget

The 2013 budget of the CGT was EUR 52 million, of which EUR 8.8 million is earmarked for operations. The budget does not include funding for projects co-financed by the European Commission (the overall budgets approved for the programming period 2007-13 amounted to some EUR 97 million).

### Tourism-related policies and programmes

In 2012, the CGT and WBT conducted a mid-term review of the implementation of the tourism planning document “Destination 2015” (see [www.printempsdutourisme.be](http://www.printempsdutourisme.be) for further information).

Destination 2015 is a five-year strategic plan covering the main tourism points as set out in the 2009 Regional Policy Declaration. Destination 2015 seeks to implement the following seven objectives, each of which is divided into two or three areas:

- Measuring the importance of the tourism economy.
- Promoting a balanced tourism development.
- Encouraging local tourism.
- Reporting on tourism diversity.
- Consolidating Wallonia’s image and reputation for quality in foreign tourism markets.
- Working with tourist operators and expand partnerships.
- Sharing knowledge.

In the light of increased international competition, Wallonia’s tourism development officers have set up a simple, flexible tool that involves the tourist industry in a process of improving the service that tourists receive (Box 1).

The movement towards interlinked working across several levels, first established a few years ago, has continued. In Wallonia, a group of representatives of the Office of the Minister for Tourism, the CGT and WBT are working together on projects such as the preparation of the Strategic Plan Destination 2015 and the organisation of the *Année des Saveurs* gastronomy promotion. There are also several public-private partnerships in place conducting scientific monitoring of various projects with the universities; operational studies with the private sector, or for tourism accommodation with potential investors. Inter-authority platforms for “leisure zones”, urban development, tourism and culture are also in place.

**Box 1. The action plan “Wallonia – a high-quality destination”**

“Wallonia – a high-quality destination” (*Wallonie, Destination Qualité*) is based on the Swiss Tourism Quality Programme and was developed in co-operation with the latter’s founders specifically to address tourism service-providers’ needs. The three-level programme is for businesses of any size that are constantly seeking to improve the services they provide and thereby ensure their future success.

Programme Level I focuses on service quality; it seeks to make quality the core of a team’s work and to improve internal procedures using simple methods while ironing out weak points. It is the ideal first step to fostering quality in a tourism-related enterprise or body. In 2012 and 2013, Level I was the only level implemented in Wallonia. After being awarded the Level I quality mark, the recipient may move to Level II. Level II deals chiefly with quality in management. Level III is for tourism businesses that have successfully introduced an internationally recognised comprehensive quality management system.

The programme aims to heighten awareness of quality in service among tourism operators, regardless of sector, and to retain and motivate employees, as well as to view situations from the client’s perspective and introduce major improvements in the quality of service provision.

“Quality Coaches” have been introduced to support businesses in their action plan to improve quality. After one year in operation:

- 254 people have been trained or coached and are capable of implementing the programme.
- 24 partners have signed up to the action plan.
- 45 local authorities have committed to a local quality plan.
- 3 Walloon teachers have been awarded the quality mark.
- 93 service providers have been awarded the quality mark.

For further information, please consult: [www.walloniedestinationqualite.be](http://www.walloniedestinationqualite.be).

**For more information**

Walloon General Tourism Commission  
Tourism Strategy Directorate  
Wallonia-Brussels Tourist Office  
Public Internet portal

<http://cgt.tourismewallonie.be/>  
<http://strategies.tourismewallonie.be>  
[www.opt.be/](http://www.opt.be/)  
[www.tourismewallonie.be](http://www.tourismewallonie.be)



## Statistical profile

Table 1. **Belgium: Domestic tourism**

	Unit	2008	2009	2010	2011	2012
Total domestic trips						
Overnight visitors (tourists) <sup>1</sup>	Thousand	3 081	3 217	3 601	3 883	3 916
Brussels	Thousand	416	473	591	666	633
Flanders	Thousand	1 851	1 895	2 086	2 246	2 299
Wallonia	Thousand	815	850	925	971	984
Same-day visitors (excursionists)		..	..	..	..	..
<i>Trips by main purpose of visit</i>						
Business and professional		..	..	..	..	..
Holiday, leisure and recreation		..	..	..	..	..
Nights in all means of accommodation		..	..	..	..	..
Hotels and similar establishments <sup>1</sup>	Thousand	5 422	5 604	6 169	6 529	6 575
Brussels	Thousand	726	826	1 014	1 138	1 109
Flanders	Thousand	3 357	3 401	3 673	3 852	3 920
Wallonia	Thousand	1 339	1 377	1 482	1 540	1 547
Other collective establishments		..	..	..	..	..
Domestic travel receipts		..	..	..	..	..

1. Hotels.

Source: Statistics Belgium, Tourism Flanders, Walloon General Tourism Commission.

StatLink  <http://dx.doi.org/10.1787/888932986017>Table 2. **Belgium: Inbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international arrivals						
Overnight visitors (tourists) <sup>1</sup>	Thousand	5 820	5 450	5 772	6 077	6 198
Brussels	Thousand	2 268	2 147	2 238	2 335	2 366
Flanders	Thousand	2 777	2 581	2 765	2 931	3 022
Wallonia	Thousand	775	722	769	811	810
Same-day visitors (excursionists)		..	..	..	..	..
<i>Top markets for Belgium</i>						
Netherlands	Thousand	1 103	1 089	1 154	1 171	1 197
France	Thousand	903	921	964	1 008	989
United Kingdom	Thousand	954	784	796	793	829
Germany	Thousand	622	608	640	665	643
Spain	Thousand	264	259	308	337	316
Nights in all means of accommodation		..	..	..	..	..
Hotels and similar establishments <sup>1</sup>	Thousand	11 120	10 333	10 854	11 436	11 693
Brussels	Thousand	4 281	4 087	4 242	4 499	4 566
Flanders	Thousand	5 433	4 949	5 248	5 522	5 726
Wallonia	Thousand	1 405	1 298	1 364	1 416	1 401
Other collective establishments		..	..	..	..	..
Total international receipts		..	..	..	..	..
International travel receipts	Million EUR	8 010	8 465	9 162	9 421	10 128
International passenger transport receipts		..	..	..	..	..

1. Hotels.


Source: Statistics Belgium, Tourism Flanders, Walloon General Tourism Commission.

StatLink  <http://dx.doi.org/10.1787/888932986036>

Table 3. **Belgium: Outbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international departures						
Overnight visitors (tourists)	Thousand	10 474	11 123	12 076	11 466	11 158
Brussels	Thousand	1 356	1 446	1 756	1 510	1 690
Flanders	Thousand	6 268	6 908	7 058	6 659	6 088
Wallonia	Thousand	2 850	2 769	3 262	3 296	3 379
Same-day visitors (excursionists)		..	..	..	..	..
Total international expenditure		..	..	..	..	..
International travel expenditure	Million EUR	13 431	13 122	14 259	14 752	15 713
International passenger transport expenditure		..	..	..	..	..

Source: Statistics Belgium, Tourism Flanders, Walloon General Tourism Commission.


StatLink  <http://dx.doi.org/10.1787/888932986055>Table 4. **Belgium: Enterprises in tourism**

Number of establishments

	2008	2009	2010	2011	2012
Total tourism enterprises	..	..	..	..	..
Tourism industries	..	..	..	..	..
Accommodation services for visitors <sup>1</sup>	3 536	3 527	3 546	3 506	4 493
Brussels	180	176	182	196	253
Flanders	2 103	2 136	2 193	2 148	2 714
Wallonia	1 253	1 215	1 171	1 162	1 526
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	..	..	..	..	..
Other industries	..	..	..	..	..

1. Includes hotels, campsites, holiday villages, accommodation for groups and from 2012 bed and breakfasts.

Source: Statistics Belgium, Tourism Flanders, Walloon General Tourism Commission.

StatLink  <http://dx.doi.org/10.1787/888932986074>