

# Belgium

## Tourism in the economy and outlook for recovery

In Belgium, tourism is under the respective authority of three regions: Flanders, Wallonia, and Brussels. This section provides a national overview of the impact of tourism in the country, followed by detail of the respective governance and policy initiatives of the Flanders and Wallonia regions.

Tourism remains a strong contributor to Belgium's economy. The most recent Tourism Satellite Account shows that in 2016 tourism's direct contribution to GVA was 4.3% in Flanders, 5.3% in the Brussels Capital region, and 4.1% in Wallonia.

Belgium's tourism sector was hit hard by the pandemic. International tourists at hotels and similar establishments fell 73%, to 1.8 million. A small recovery in 2021 saw international tourists return to 2.3 million (up 28% from 2020).

Domestic tourism has grown in important in Belgium. Before the COVID 19 pandemic, the domestic market made up 42% of all tourists in hotels, which increased to 63% in 2021.

Overall, there were 11.0 million domestic and international arrivals in all types commercial accommodation (including camping grounds) in Belgium during 2021. Of these 6.8 million visited Flanders, 1.3 million visited Brussels, and 2.8 million visited Wallonia. The top market sources were France, the Netherlands and Germany, with a total market share of 71% in 2021, up from 51% from 2019. A recovery in international tourism is expected in 2025.

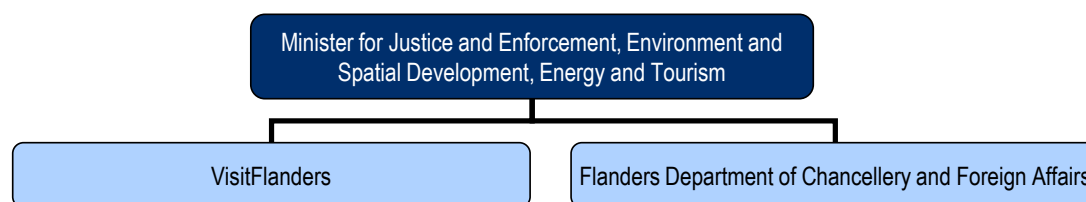
## Flanders Region

### Tourism governance and funding

In Flanders, tourism is the responsibility of the Flemish Minister for Justice and Enforcement, Environment and Spatial Development, Energy and Tourism. The Tourism Unit of the Flanders Department of Chancellery and Foreign Affairs is responsible for international tourism policy and relations.

The overall public sector budget allocated to tourism has remained the same, with the exception of the extra support given to the sector during the COVID-19 pandemic. In 2021, EUR 28.5 million was allocated to the social tourism sector, with an additional EUR 40 million for subsidies to the whole tourism sector. Besides this budget, the tourism sector also benefits from more general support for enterprises, such as financial support, temporary unemployment support and loans.

## Flanders: Organisational chart of tourism bodies



Source: OECD, adapted from the Flanders Department of Chancellery and Foreign Affairs, 2022.

## Tourism policies and programmes

Flanders has defined a regional recovery plan, “Flemish Resilience” (Vlaamse Veerkracht), for the period of 2022-26. This plan aims to help all economic sectors, including tourism, to ‘stand up’ from the crisis, with a total budget of approximately EUR 4.3 billion. Within this plan, EUR 150 million has been reserved for tourism. These investments will mainly focus on larger-scale infrastructure and supra-local visitor experiences to support:

- The meetings, conferences and events sector with investment in multiple state-of-the-art MICE infrastructure projects. This investment will help increase the sector’s competitiveness and aid the transition to digital and hybrid events.
- Landmark tourism projects, which will be targeted on themes that the Flemish Minister for Tourism has set out and will be financed through a mix of direct financing and theme-based open project subsidy calls. The theme focus is on heritage, cycling, culinary, nature and social tourism.

In 2021, Flanders implemented a programme to help individual tourism entrepreneurs make strategic investments, with 100% pre-financing given for investments in sustainability, health, digitalisation and professionalisation, to be partially repaid after five years. This reimbursement period was chosen to coincide with the expected recovery of international tourism. The Flemish Government allocated a budget of EUR 30 million for this programme, supplemented by additional funds from provincial and local authorities.

The longer-term strategy for tourism in Flanders is based upon the principles of “Travel to Tomorrow” (see box below). Travel to Tomorrow is a value-driven vision built on balance and sustainable tourism principles, but also considers quality, creativity and co-operation. This vision has been created in conjunction with the private sector, and aims to achieve flourishing communities and vibrant destinations.

### Travel to Tomorrow Strategy in Flanders, Belgium

Travel to Tomorrow, based on sustainability and the principle that all stakeholders in the tourism ecosystem can benefit from tourism, calls for a different approach to measuring, developing, and promoting travel in response to recent shocks. To achieve a needed paradigm shift in tourism, the strategy is guided by principles to steer action into 2030:

- Searching for the right balance: Flanders wants to create broad social value through tourism for locals and visitors, by offering them a qualitative and inspiring travel experience and connections. Understanding the full value equation by factoring in the 'loss of value', such as the environmental cost, is equally important.
- Responding to the effects of COVID-19 pandemic: Staying home has made people value travel more than ever. At the same time, people are more aware of the vulnerability and the consequences of our travel behaviour on the ecosystem. Tourism must reinvent itself and take advantage of this opportunity for a hard reset.
- Connecting people, places and activities in a unique story: A flourishing destination offers impactful experiences that inspire people, enhance well-being and enrich visitors, locals, entrepreneurs and service providers. Tomorrow's tourism is a tailor-made welcome 'for everyone' - because a destination can only flourish if nobody is excluded.

## Wallonia Region

### Tourism governance and funding

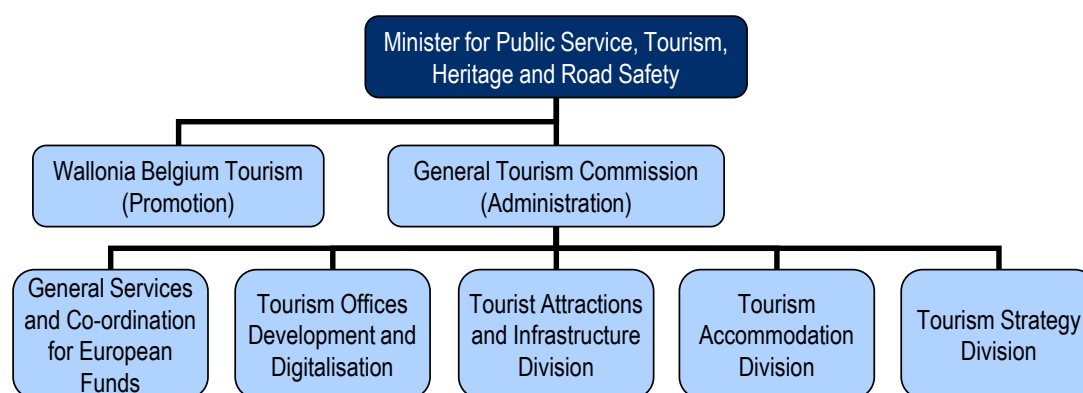
In Wallonia, tourism is the responsibility of the Minister for Public Service, Tourism, Heritage and Road Safety. The German-speaking community in Wallonia has made an agreement with Wallonia to manage tourism in its territory.

Two main bodies support the Wallonia tourism sector:

- The General Tourism Commission (CGT) is the main tourism administration in Wallonia and focuses on developing quality tourism. It provides support to the sector through advice, recognition, labelling and financial aid.
- Wallonia Belgium Tourism (WBT) is responsible for promoting Walloon tourism in Belgium and foreign markets.

The 2020 Walloon budget allocated to tourism was EUR 67 million, of which EUR 11.4 million was for measures to support tourism operators due to the COVID-19 crisis. The 2021 Walloon tourism budget was EUR 54 million, of which EUR 10 million supported tourism operators affected by the pandemic. A variety of European funds have additionally been used for dedicated tourism projects.

## Wallonia: Organisational chart of tourism bodies



Source: OECD, adapted from the General Tourism Commission of Wallonia, 2022.

## Tourism policies and programmes

The COVID-19 crisis confirmed, and at times accentuated, a series of emerging trends for tourism in Wallonia. These included: a shift towards local and domestic tourism; an increase in nature-based tourism, including outdoor activities like walking and cycling; a greater awareness of local culture; and a greater focus on sustainability, digitalisation and well-being. A continuation of macro-trends will also impact tourism, such as an ageing population and urbanisation. This has created a shift in the needs of the tourism sector moving forward.

In the short term, the Walloon tourism sector benefitted from economy-wide and tourism-targeted initiatives by the Walloon Government. Targeted support plans, valued at EUR 24.4 million, were primarily established under the “Get up Wallonia” plan. This Walloon recovery plan will receive both Walloon and European funding. The plan includes the development of a COVID-19 recovery plan and action plan with innovative actions for tourism focused on:

- Stepping up the digitalisation of the sector.
- Developing the image of “Destination Wallonia” using tourism as a vector.
- Developing sustainable infrastructure dedicated to cycle tourists.
- Redeveloping the major Eau d'Heure lake complex.
- Developing river tourism.
- Creating national parks to highlight Wallonia’s natural assets.

Focusing on the medium and long-term needs of the sector, the Walloon Minister of Tourism asked for an examination of the digital strategy and the creation of a new tourism strategy in 2021. The new Tourism Strategy 2030 has objectives to:

- Increase the economic benefits of the sector by increasing average spend.
- Develop a strategic positioning relating to two themes that characterise Walloon tourism: Nature and Escape; and Culture, Heritage and Agritourism.
- Increase the development of skills and the attractiveness of the sector.
- Attract more Belgian, French, Dutch and German tourists and business tourism.
- Implement innovative tools to develop an understanding of the expectations and needs of visitors.

## Statistical Profile

### Belgium: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	3 997	4 872	5 362	4 284	6 911
Same-day visitors (excursionists)	..	18 480	..	..	19 013
Nights in all types of accommodation	13 701	19 925	18 627	17 407	26 169
Hotels and similar establishments	8 849	11 092	10 376	9 458	16 048
Other collective establishments	1 386	1 666	1 301	1 901	2 742
Private accommodation	3 446	7 166	6 950	6 049	7 379
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	6 313	6 700	6 800	1 804	2 313
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Netherlands	1 032	1 037	1 038	361	611
France	963	1 010	1 036	391	571
Germany	701	726	756	234	268
Spain	348	345	346	66	88
Italy	228	250	263	64	79
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	11 632	12 424	12 669	3 480	4 341
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	14 638	15 626	17 322	7 109	8 593
Same-day visitors (excursionists)	4 742	5 458	6 396	3 080	2 280
Top destinations					
France	4 370	4 919	4 780	2 712	3 267
Spain	1 755	1 797	1 813	550	964
Netherlands	1 724	1 594	2 112	796	844
Italy	1 075	933	1 289	504	636
Germany	946	945	1 375	465	515
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	8 518	8 748	9 460	6 530	..
International travel receipts	7 419	7 530	7 957	5 785	..
International passenger transport receipts	1 099	1 218	1 503	745	..
<b>Outbound tourism</b>					
Total international expenditure	15 721	17 638	18 773	12 180	..
International travel expenditure	13 738	15 655	16 756	11 391	..
International passenger transport expenditure	1 983	1 983	2 017	789	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/cwpalm>

## Belgium: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2021	2017	2018	2019	2020	2021
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	..	..	..	..	..	..
Accommodation services for visitors	9 516	..	..	..	..	..
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).

StatLink  <https://stat.link/dzteix>



From:

## OECD Tourism Trends and Policies 2022

Access the complete publication at:

<https://doi.org/10.1787/a8dd3019-en>

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### Please cite this chapter as:

OECD (2022), "Belgium", in *OECD Tourism Trends and Policies 2022*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/b1d6e432-en>

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