

Belgium

Tourism in the economy

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 directly contributes 2.3% of total GVA in Belgium, while employment in tourism sectors represents 6.7% of the total employment, according to the Tourism Satellite Account. Travel exports accounted for 7.2% of total service exports in 2018. In Flanders, the tourism sector accounted for 4.5% of GDP (EUR 11.7 billion), and 5.5% of employment. In 2017 in Wallonia, tourism made up 4.1% of GVA (EUR 3.6 billion) and supported 84 000 jobs, including 59 000 full-time equivalents, representing 7.5% of employment in the region.

In 2018, Belgium received 6.7 million international tourists (up 6.1% over 2017), who spent a total of 12.4 million nights (+6.8%). Of this figure, 3.2 million visited Flanders (47.2%), 2.7 million visited Brussels (40.6%) and 815 000 visited Wallonia (12.2%). Between 2017 and 2018, Brussels experienced the fastest growth in international arrivals (+8.5%), followed by Flanders (+5.1%), and Wallonia (+2.7%). The leading international markets for Belgium include the Netherlands, France, the United Kingdom and Germany, which together account for over half (52.7%) of total arrivals. Domestic tourism has also experienced growth in Belgium, with resident overnight visitors reaching a total of 4.8 million in 2018, up 6.9% over 2017. Of this, 60.1% visited Flanders, 23.5% Wallonia and 16.4% Brussels. In total, domestic tourists spent some 7.9 million nights in hotels and similar establishments.

Flanders Region

Tourism governance and governance

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 Flemish Department of Foreign Affairs is responsible for international tourism policy and relations.

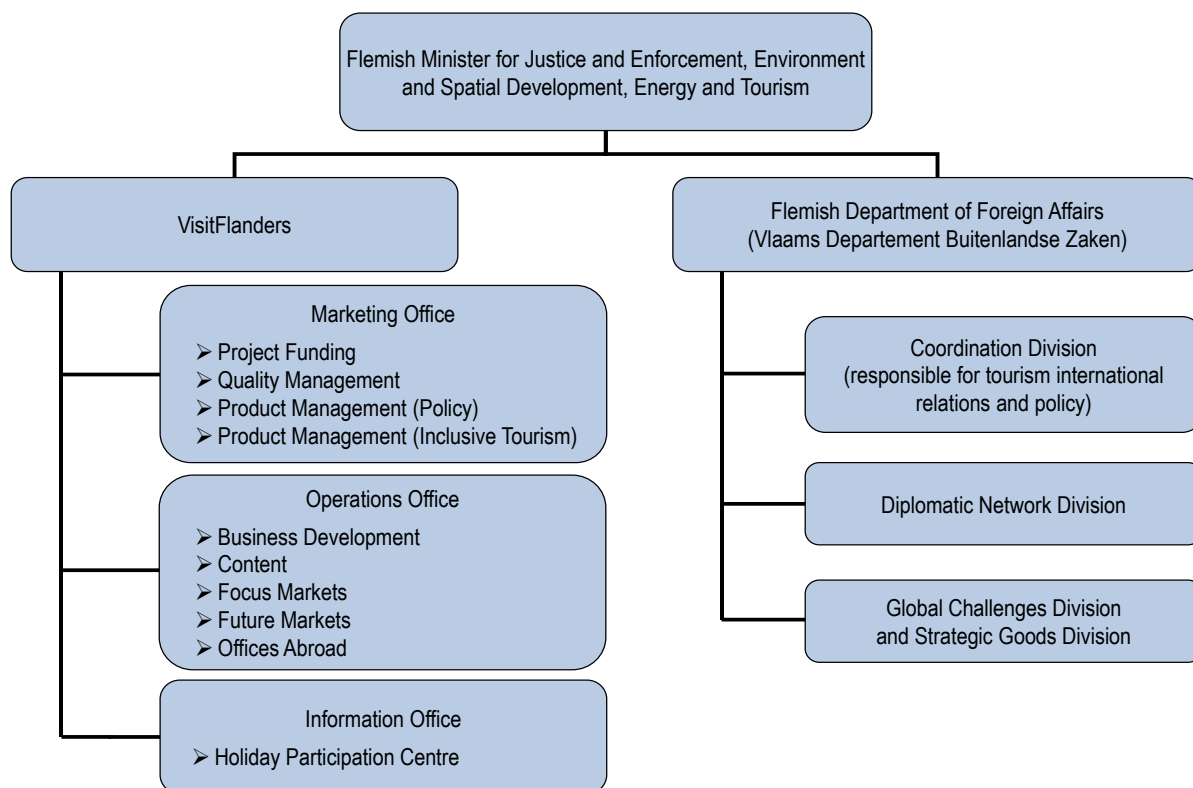
The Flemish tourist board, VisitFlanders, has the following objectives and functions:

- Investing in the sustainable development and promotion of Flanders and Brussels.
- Providing investment and support to make Flanders tourism more attractive.
- Promoting Flanders as a tourist destination to attract more visitors.
- Making sure that residents can enjoy and have a holiday, including people with disabilities or those with limited economic means.
- Stimulating professionalism in the sector in order to guarantee visitors a quality offer and experience.
- Recognising tourism accommodation providers.

Visit Flanders co-operates closely with the private sector, including Horeca Vlaanderen, Brussels Airport, Recread, CiB and Logeren Vlaanderen. This co-operation is facilitated by the Visit Flanders Advisory Committee, a legally-constituted body that advises the Minister and the CEO of Visit Flanders on tourism issues and policy.

In 2018, the overall budget for VisitFlanders was EUR 69.6 million. The provinces and the local authorities also invest in the domestic promotion of Flanders.

Belgium, Flanders region: Organisational chart of tourism bodies



Source: OECD, adapted from the Flemish Department of Foreign Affairs, 2020.

Tourism policies and programmes

For the period 2019-2024, the policy of Flanders aims to strengthen the positive power of tourism so that the region can flourish as an innovative, inspiring and high quality destination for the benefit of its residents, entrepreneurs and visitors. To this end, Flanders has three major objectives:

- Improving support to the tourism sector by policy makers and stakeholders.
- Identifying and developing narratives to tell the Flanders-wide story to visitors.
- Developing tourism that has sustainability and accessibility as core elements of the offer.

Over the last two years, Visit Flanders and the Flanders Department of Foreign Affairs have begun a journey towards “Travel to Tomorrow”. Working together with various tourism partners and stakeholders, through this co-creative thinking process Flanders is undertaking an in-depth reflection on the wider transformative power of tourism, and the structure and processes that are needed to ensure that interactions between visitors, residents and places generate net benefit for all parties, going beyond economic growth (Box 1.6).

Wallonia Region

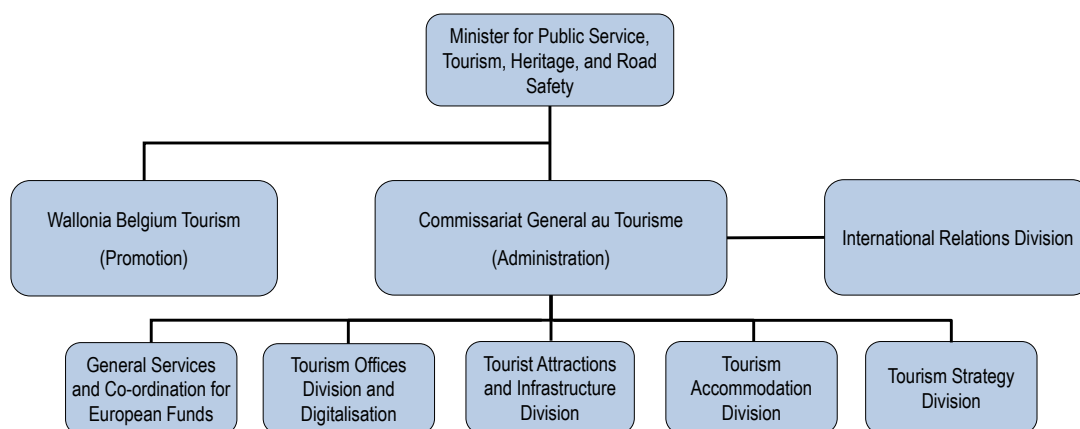
Tourism governance and funding

In Wallonia, tourism is the responsibility of the Minister for Public Service, Tourism, Heritage and Road Safety. Three bodies support the tourism sector:

- The Walloon Tourism Administration (CGT) is responsible for implementing the Walloon Government's tourism policy, improving the tourism offer, and organising and professionalising the sector.
- Wallonia-Belgium Tourism (WBT) is the tourism marketing body for the Walloon region, which works to attract tourists from overseas, boosting image and reputation, undertaking marketing campaigns and developing product with key partners.
- Wallonia Tourism Engineering Centre (CITW) is a joint economic and tourism research centre focused on tourism policy development and the co-ordination of research studies.

Engagement with the private sector is a priority for these bodies. Support measures provided include investment in facilities, assistance and financial support, the assessment of accommodation, visitor attractions and tourist guides, and the establishment of marketing partnerships to promote Wallonia. The 2019 budget allocated to tourism was EUR 58.8 million, not including funding for projects co-financed by the EU.

Belgium, Wallonia region: Organisational chart of tourism bodies



Source: OECD, adapted from the Commissariat General au Tourisme (Walloon administration for Tourism), 2020.

Tourism policies and programmes

Tourism policy in Wallonia is focused around two main objectives:

- **Developing and building on the assets of the region:** This includes measures to develop the tourism offer around the region's natural areas, world heritage sites, gastronomy, and major events, as well as creating packages for specific segments and improving service in major visitor attractions with multi-lingual staff, greater accessibility and longer opening hours.

- **Upgrading skills and competences to improve efficiency:** Priorities here include improving training in languages, quality of service and sustainable tourism, as well as the provision of financial support and innovation tools to the tourism sector.

Developing accessible cycle tourism in Wallonia

With more than 1 300 km of greenways, Wallonia aims to become a cycling tourism destination of excellence for all types of cyclists. To this end, it has developed the Wallonia-by-Bike Cycling Strategy, one component of which is developing accessible cycle tourism. The non-profit body, Access-I, has undertaken preliminary work to identify accessible routes, including analysis of various different adapted bicycles and meeting cyclists with specific needs to better understand their expectations. Six routes have been developed so far, with two different levels of difficulty. Through this work, the following elements have been identified as important when developing accessible cycle tourism:

- Availability of secure parking close to the start of the route.
- Accessibility of the path between the car park and the start of the route.
- Accessibility of the entrance to the route.
- Adequate width along the whole route.
- Limiting inclines.
- Regular rest areas.
- Adequate signage that allows for a stress-free ride without the risk of getting lost.
- Route design so that the cyclists never have to dismount.
- Possibility to turn back at designated areas.

During the project's development, special attention was paid to visual and cultural appeal. Like everybody, people with specific needs go cycling to enjoy moments of discovery. The quality and aesthetics of the cycle route are just as important as its accessibility. Another important part is the existence of related services such as restaurants, tourist offices and leisure activities, which is a condition for certification. The certification process of accessible cycling routes is now formalized.

Source: www.access-i.be.

The Walloon Tourism Administration has also prioritised measures including:

- Development of an official database and digital projects in collaboration with tourism offices.
- Improvement and updating of existing data. The Wallonia Tourism Observatory produces statistics and a Tourism Satellite Account. Current priorities include economic statistics on accommodation, museums and visitor attractions, and the analysis of rural tourism impacts.
- Continued roll-out of the Wallonia Quality Destination label, which is a quality management tool that gathers tourism professionals from across the region in a process to continually improve the quality of services on offer for tourists.
- Proactive land use planning according to tourism development requirements with the construction of three new resorts
- Product development that meet the demands of the sector, including a Wallonia-by-Bike Cycling Strategy, with over 1 900 km of route now in place and 608 certified operators (see box).
- Establishment of the *Ulysse* network lab dedicated to tourism training in schools.

Statistical profile

Belgium: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	4 175	4 304	4 326	4 492	4 801
Brussels	702	676	634	728	790
Flanders	2 420	2 582	2 590	2 639	2 885
Wallonia	1 053	1 046	1 102	1 124	1 127
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	6 926	7 048	6 968	7 313	7 858
Brussels	1 232	1 182	1 030	1 236	1 366
Flanders	4 032	4 260	4 240	4 333	4 736
Wallonia	1 661	1 607	1 698	1 744	1 756
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	6 389	6 440	5 557	6 313	6 700
Brussels	2 546	2 534	2 101	2 510	2 723
Flanders	3 051	3 107	2 736	3 009	3 162
Wallonia	791	799	720	794	815
Same-day visitors (excursionists)	..	..	..	..	..
Top markets for Belgium					
Netherlands	1 053	1 044	966	1 032	1 037
France	1 007	957	883	963	1 010
United Kingdom	880	873	702	717	753
Germany	667	698	614	701	726
United States	343	362	275	335	383
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	12 082	12 035	10 215	11 632	12 424
Brussels	5 058	4 987	3 962	4 772	5 254
Flanders	5 647	5 711	5 023	5 505	5 788
Wallonia	1 377	1 337	1 230	1 355	1 383
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	13 272	12 499	15 773	14 638	15 626
Brussels	2 226	1 879	2 295	2 342	2 605
Flanders	7 256	7 344	9 253	8 077	8 514
Wallonia	3 790	3 277	4 225	4 219	4 507
Same-day visitors (excursionists)	..	..	..	..	..
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	11 483	8 091	7 937	8 518	8 803
International travel receipts	10 486	7 090	6 909	7 419	7 549
International passenger transport receipts	997	1 001	1 028	1 099	1 254
Outbound tourism					
Total international expenditure	19 907	14 292	14 910	15 721	17 673
International travel expenditure	17 935	12 309	13 029	13 738	15 687
International passenger transport expenditure	1 972	1 983	1 881	1 983	1 986

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076381>

Belgium: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2018	2014	2015	2016	2017	2018
Total
Tourism industries
Accommodation services for visitors	9 211	..	..	..	..	..
Brussels	362	..	..	..	..	..
Flanders	5 628	..	..	..	..	..
Wallonia	3 221	..	..	..	..	..
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
Other industries

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076400>



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