

Haute Ecole  
« ICHEC – ECAM – ISFSC »



Enseignement supérieur de type long de niveau universitaire

# **What is the current value and attractiveness of Brussels as a tourist destination and how can it be enhanced through cultural heritage ?**

Mémoire présenté par :

**Benjamin DREZE**

Pour l'obtention du diplôme de

**Master en gestion de l'entreprise**

Année académique 2021-2022

Promoteur :

**Ruba SALEH**



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# Introduction

The covid-19 crisis has highlighted it : Brussels suffers from an image deficit at the national level. During this period, when only domestic tourism was allowed, Brussels hotels experienced more difficulties than other destinations in Belgium. At an international level, Brussels is an ideal transit destination for tourists coming from or going to Paris or Amsterdam, for example. However, exclusive travel to Brussels seems to be rather rare among international tourists visiting the capital.

This situation, already noticeable before the covid-19 crisis, has led the private tourism stakeholders active in Brussels to conclude that the city is not attractive enough, and that it could attract more tourists with a clear strategic plan. A number of alliances have recently been formed in this perspective, such as Reboot Brussels, which brings together both private and public stakeholders, to define a common vision for the capital.

As Brussels has a valuable cultural heritage, the question arises as to the role that culture, and the arts, will play in this global strategy. This thesis aims to answer the following question : **what is the current value and attractiveness of Brussels as a tourist destination and how can it be enhanced through cultural heritage ?**

Many of Europe's most popular destinations, such as Vienna or Bilbao, have indeed built their identity around cultural heritage. In order to determine if the same logic can be applied to Brussels, experts in tourism and cultural heritage have been interviewed, with the aim of determining whether Brussels is judged to be sufficiently attractive and defining the importance of Brussels' cultural heritage, as well as possible ways of making it more attractive.

The first part of this thesis will consist of a review of the scientific literature which will define from the outset some key concepts, such as tourist destination, destination value or attractiveness. In the same section, tourism-related trends that have emerged during the covid-19 crisis and that are likely to last in the future will also be discussed.

Then the methodology used to answer the research question will be further detailed.

In the third part, some key statistics on tourism in Brussels will be discussed. Qualitative data, to assess the image of Brussels as a tourist destination at national and international level, but also quantitative data, to measure the number of overnights and the average length of stay in the capital, and its evolution. The quantitative data will be broken down by geographical area, so as to study the figures for the national, European and North

American markets in more depth. These markets indeed represent the 3 main tourist markets for Brussels.

In order to complete the contextual analysis, the role of the management body of the destination Brussels, [visit.brussels](http://visit.brussels), as well as its objectives and action plan, will also be explained. This is an essential step to avoid repetition and to ensure that the recommendations do not propose measures that have already been put in place by the Brussels tourism board.

However, before reaching the recommendations, it will be necessary, in the light of the conclusions of the previous sections and the information gathered from the field, to discuss various themes such as the value and attractiveness of Brussels as a tourist destination and how to improve it through cultural heritage.

Finally, the strategic recommendations made to the Brussels tourism stakeholders will act as a conclusion to my work.

# Chapter 1 – Literature Review

## 1.1. Definition of key concepts

### A. Tourist Destination

Before defining what is a tourist destination, it is important to address the difference between tourists and travellers. According to the United Nations and World Tourism Organization (2008), quoted by Laimer (2010), « a traveller is someone who moves between different geographic locations, for any purpose and any duration », while a visitor is « a traveller taking a trip to a main destination outside their usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited ». This means that visitors are a sub-category of travellers.

The sub-category of travellers who are not visitors therefore includes :

- ✓ People who stay in the destination for more than one year, such as refugees, long-term workers and long-term students.
- ✓ People who are employed by a resident entity in the destination, such as border workers, seasonal and short-term workers, and crews on public modes of transport.

Within the visitor sub-category, a distinction is made between same-day visitors called excursionists and overnight visitors called tourists. Visitors may have various reasons for travelling, including:

- Holiday, leisure and recreation
- Business and professional
- Visiting friends and family
- Short-term education and training (less than one year)
- Health and medical care
- Religion and pilgrimages
- Shopping
- Transit
- ...

As can be seen, the notion of tourist as defined by the UNWTO is rather broad and in order to go deeper into the subject matter, it is necessary to choose a more specific target audience for which to enhance the attractiveness of Brussels. For this reason, in this work

we will consider that a tourist is an excursionist or an overnight visitor who travels either for holiday, leisure and recreation purposes, or for visiting family and friends, or for shopping. Both tourists who travel within their country of residence (domestic trip), in this case Belgium, and those who travel abroad (outbound trip) will be taken into account.

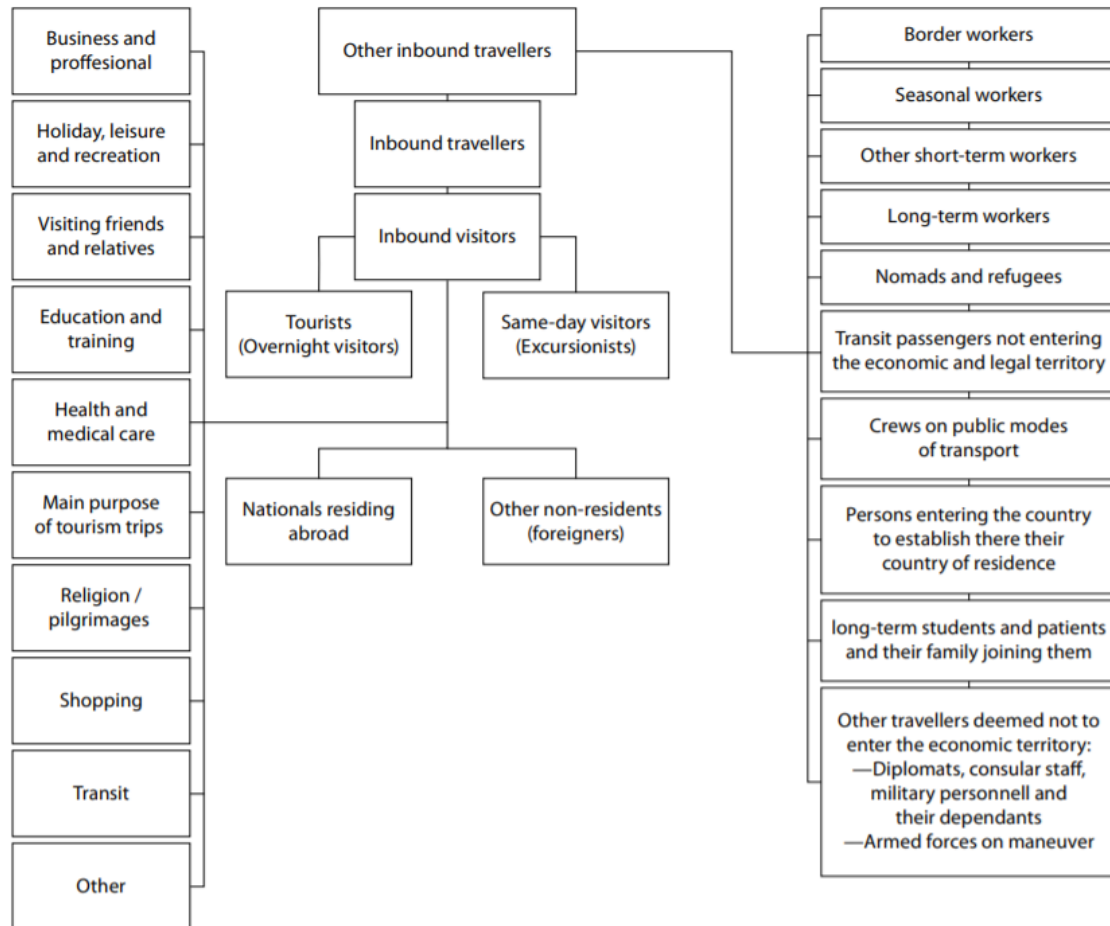


Figure 1: Classification of inbound travellers (UNWTO, 2008)

Now that the notion of tourist is clearly defined, the concept of destination must be considered.

From a geographical approach, a destination « refers to the place where tourists intend to spend their time away from home. This geographical unit visited by tourists may be a self-contained centre, a village or a town or a city, a region or an island or a country. Furthermore, a destination may be a single location, a set of multi-destinations as part of a tour, or even a moving destination such as a cruise » (Jafari, 2000), which is characterised by the presence of cultural, heritage (cf. 1.1.D) or natural objects.

However, it is not the only way to address the concept of destination, as it can also be approached from a marketing and systemic perspective. The destination is then seen as a system where different organisations, belonging or not to the same branch of activity (Botti et al., 2008), interact to form a type of tourism products and services from numerous private and public operators (Tocquer & Zins, 1999).

Such additional approaches are necessary since the mere presence of objects (cultural, heritage and natural) is not sufficient to ensure the presence of tourists (Violier, 2009).

## B. Destination Value

Value is a concept that has several dimensions. For example, it can refer to the value added of a company, which, as Gilchrist (2018) points out, is the difference between the value of goods sold and the value of materials or supplies used to produce them. But it can also refer to the financial value of a company for its shareholders or to the value of a company perceived by consumers (Brechet & Desreumaux, 2001).

Moreover, as a destination is not a company, it is important to take into consideration the specificities of the tourism sector, and in particular its co-production dimension (Clergeau & Violier, 2012). Indeed, this sector is characterized by the experience of a stay by the consumer. This stay is neither a good nor a service, but an experience during which the traveller consumes a whole range of services, which are delivered by a set of actors, and not by a single company (Clergeau et al., 2014). These actors are part of the same territory, called a destination (cf. 1.1.A), whose competitive advantage therefore relies « on the overall inter-firm network configuration more than on a few individual firm competencies » (Denicolai et al., 2010).

The notion of value in tourism has thus the particularity of being intimately linked to cooperation and co-production. This is probably one of the factors that can explain why the tourism sector is today one of the major actors of the collaborative economy (Clergeau & Spindler, 2014). Tourism can therefore be a particularly interesting study subject for any other sector that would like to create more value through increased collaboration between the different actors that compose it. Yet, in practice, the value chain of tourism suppliers and intermediaries is often fragmented, with limited coordination between the small and medium-sized enterprises (SMEs) that make up the majority of the sector (Constantin et al., 2021).

Consequently, the complexity of the tourism sector requires a collective approach to destination strategy, and the way in which a destination's tourism ecosystem maintains

the balance between cooperation and competition determines, to a large extent, the long-term competitiveness and success of the destination (Palmer & Bejou, 1995).

This balance between cooperation and competition is known as *coopetition*. In fact, research (Bengtsson & Kock, 2000) has shown that organizations do not necessarily engage in either competitive or cooperative relationships, but that on the contrary, these two relationships can coexist. In the scientific literature, the term *coopetition* is defined as simultaneous cooperation and competition (Brandenburger & Nalebuff, 1996).

The concept of *coopetition* is especially relevant in the tourism sector, since in order to provide services to travellers, destinations must effectively coordinate the resources and capabilities of industry businesses, which requires both cooperation and competition (Wang & Krakover, 2008). Indeed, if we take the example of a hotel, the fact that it is competitive from a strictly individual point of view does not guarantee that it will perform satisfactorily, as the competitiveness of the destination it belongs to must also be considered (Clergeau & Spindler, 2016). If the latter is particularly weak, the performance of this hotel, although competitive on an individual level, will also be weak. Hence the need for cooperation with other companies in the sector to increase the competitiveness of the destination as a whole.

In a nutshell, the value of a destination corresponds to the quality of the stay provided to the traveller, which depends mainly on the cooperation between the tourism actors of the territory, as well as on their own competitiveness. When we talk about increasing the value of Brussels as a destination, the implicit objective is dual: to increase the competitiveness of Brussels' tourism actors and to improve cooperation between them, knowing that the first often results from the second.

### C. Attractiveness

Since the beginning of this century, the world's top 10 tourist destinations have attracted 70% of all tourists, with the rest having to share the remaining 30% (Morgan et al., 2002). The least known destinations, including Brussels, are thus faced with very intense competition, hence the need to be perceived as an attractive destination.

But what is attractiveness? « The attractiveness of a destination reflects the feelings and opinions of its visitors about the destination's perceived ability to satisfy their needs » (Vengesai, 2003). Concretely, this means that for a destination to be perceived as attractive, and thereby attract more tourists, it must first be able to meet their needs. Since tourists are not a homogeneous group and each of them has different needs, it is

impossible for a destination to be perceived as attractive to all. It is therefore necessary to first identify which tourist segments the destination is primarily aimed at.

This attractiveness, which has the power to attract tourists, is linked to two main attributes of the destination (Vengesai, 2003):

1. Attractions : the main elements of destination attractiveness. If a tourist chooses one destination over another, it is largely because of them. These attractions are bound to evolve over time, as in recent decades tourists are increasingly looking for experiences that go beyond the passive visiting practices of the past (Crouch & Ritchie, 1999), a trend that has become even more pronounced with the emergence of new technologies. Nevertheless, the categorisation used by the scientific literature has remained the same over time and groups the attractions into 5 different categories (Tam, 2012) :

- Natural factors
- Social factors
- Cultural and historical factors
- Events, recreational and shopping facilities
- Food and drinks

The order of importance of these categories varies according to the profile of the tourist, which depends among other things on their tastes, age, region of origin and social class. For instance, a tourist who is primarily looking for a sunny destination to relax on the beach is likely to give more weight to natural factors. On the contrary, a Spanish tourist who lives next to the sea all year long might prioritise other factors, or at least different natural factors from the sun and the beach.

2. Supporting facilities : the secondary elements of destination attractiveness. The attractiveness of a destination is also enhanced by its ability to provide facilities that tourists can use on site (e.g. accommodation, transport, energy, etc.). These are elements that do not per se attract tourists, but their absence or poor quality could still discourage them, while their good quality could represent an incentive, provided that the attractions meet the visitor's need.

Likewise, another element that plays a secondary role in attractiveness is the accessibility of the destination, in other words the time and cost needed to reach it (Das et al., 2007). These are known as situational factors.

But attractiveness is not limited to the ability of a destination to satisfy the specific needs of tourists through attractions and supporting facilities. It is the perceived ability, which



depends on the tourist's feelings, beliefs and opinions about the destination (Hu & Ritchie, 1993). This is where communication comes in, in order to convey as clearly as possible the attractions available (whether natural, social, cultural, recreational or gastronomic), so that a tourist whose needs can be met by the destination will perceive it as attractive.

Beyond communication, the satisfaction of visitors plays an increasingly significant role in the image of a destination (Bigne et al. 2001), as they tend to share their experience not only with their friends and family but also on social networks and review websites. Moreover, it goes without saying that a very satisfied tourist is a tourist whose own image of the destination has improved and who is more likely to visit it again.

Interestingly, if visitor satisfaction influences the perception of a destination, the reverse is also true. Indeed, satisfaction depends on the visitor's expectations, and these expectations are directly related to how the visitor perceives the destination. Communication should therefore avoid creating unrealistic expectations about the destination, otherwise the majority of tourists will be dissatisfied. Generally speaking, a tourist is considered to be satisfied if the destination has matched their expectations, and very or extremely satisfied if the destination has exceeded them (Das et al., 2007).

#### D. Cultural Heritage

While being attractive for tourists is a key factor for a destination, the advantage it will gain will be limited if its competitors are also perceived as such. « It is no longer sufficient to copy one's competitors, it is essential to stand out from them » (Jagodzińska et al., 2015). And cultural heritage is precisely one of the greatest ways to make a city unique.

In order to understand what exactly cultural heritage is, it should first be specified that two categories coexist within this concept: tangible and intangible heritage. According to UNESCO (1972), tangible heritage includes « monuments [...] groups of buildings [...] and sites [...] of outstanding universal value from the historical, aesthetic, ethnological or anthropological point of view » :

- Monuments : « architectural works, works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features »
- Group of buildings : « groups of separate or connected buildings »
- Sites : « works of man or the combined works of nature and of man, and areas including archaeological sites »

To these three elements, some regions of the world, including Europe, add landscapes and environment (Ahmad, 2006), in other words natural heritage consisting solely of the work of nature without human intervention.

However, this definition of tangible heritage overlooks a whole part of culture referred to as intangible heritage. These are « living expressions inherited from our ancestors, such as oral traditions, performing arts, social manners, rituals, festive events, knowledge and practices related to nature and the universe, and knowledge and techniques linked to traditional crafts » (UNESCO Santiago, 2022).

Possibly the most inclusive definition that encompasses both categories is that of UNESCO Santiago, the UNESCO Regional Bureau for Education in Latin America and the Caribbean, which defines heritage as « the cultural legacy which we receive from the past, which we live in the present and which we will pass on to future generations ».

Lastly, after defining the concept of value for the destination (cf. 1.1.B), it is necessary to do likewise for cultural heritage. According to Jagodzińska et al. (2015), the value of heritage refers to what it means to people. It therefore goes beyond the actual impact of heritage on the economy and society of a destination. Naturally, both can have an influence on each other. If people consider a given heritage as a real asset of a destination, they are more likely to visit it, thereby generating a real economic impact, which in turn can lead to a higher valuation of the given heritage in people's minds.

The value people place on heritage is intrinsically linked to the benefits they perceive from it. Based on a survey conducted in 2015 by Cultural Heritage Counts for Europe (a project co-funded by the Culture Programme of the European Union) on 456 Mechelen citizens, the most commonly recognised benefits of heritage are, by order of awareness among respondents:

1. The growth of tourism
2. The high-quality aesthetic environment
3. The passing on of something to the next generations
4. The conservation of what the ancestors have built
5. The conservation of cultural traditions and identity
6. The educational role, knowing the past to understand the present
7. The conservation of the original outlook of the cities and landscapes
8. The economic benefits
9. The recreational possibilities

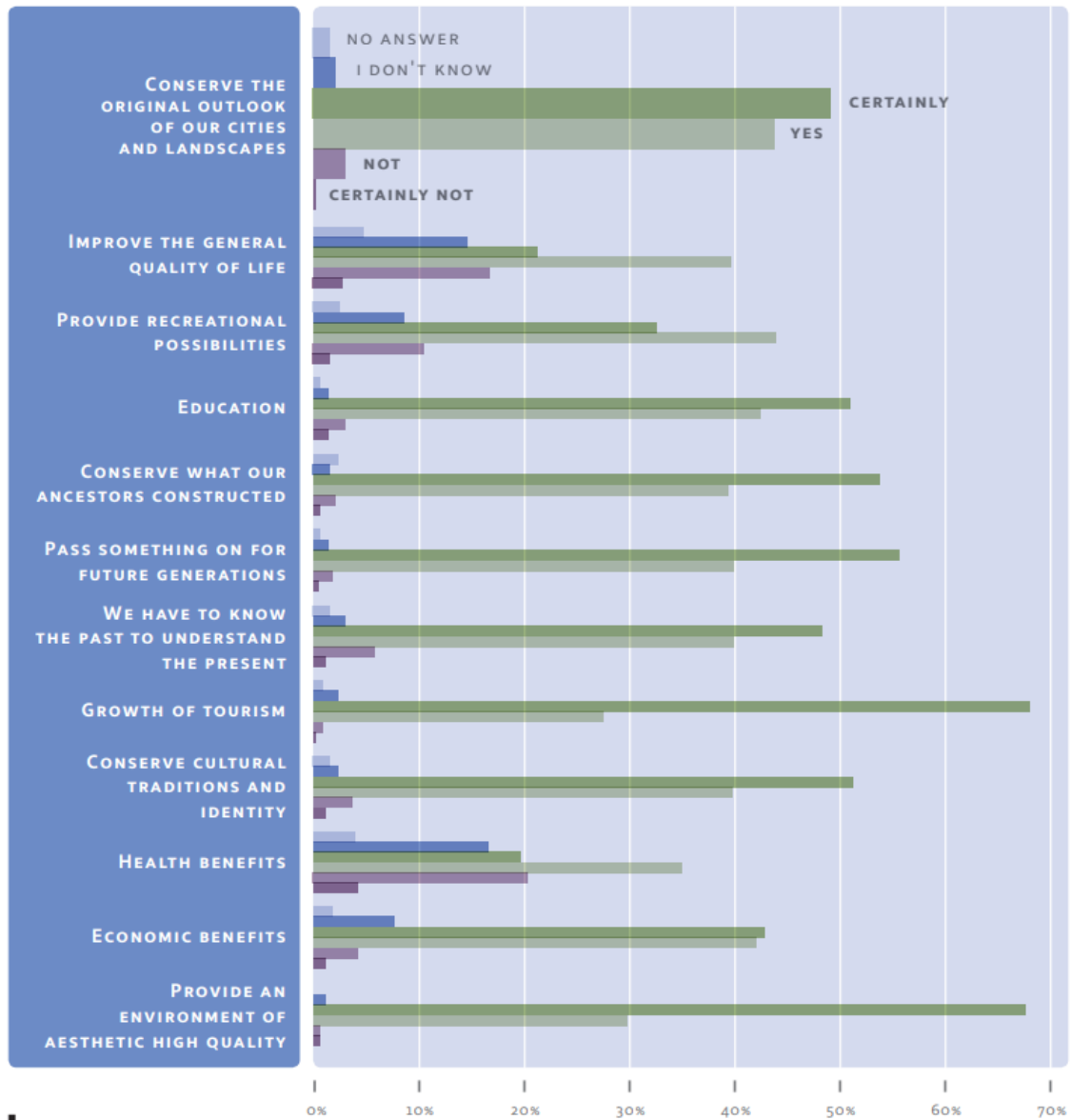


Figure 2: Benefits of cultural heritage (CHCfE, 2015)

## E. Destination Management Organisation (DMO)

### a. Definition of DMO

DMO stands for Destination Management Organisation. The UNWTO, relayed by Borzyszkowski (2013), defines it as an organisation that is « responsible for management and/or marketing of individual tourist destinations ». Its geographical scope can be national, regional or local to a specific city or town.

DMOs were originally state-owned organisations or industry association collectives, but they now take a variety of organisational forms and governance structures, including :

- Department of single public authority
- Partnership of public authorities
- Public authority or authorities outsourcing delivery to private companies
- Public-private partnership, often in the form of a non-profit organisation
- Association or company funded purely by a private sector partnership (World Tourism Organization, 2007)

#### *b. Role of the DMO*

Initially, the role of the DMO was limited to marketing and promoting the destination as an attractive place to travel to through advertising campaigns (Sheehan et al., 2015). In fact, the abbreviation DMO referred to Destination Marketing Organisation. But over time, the responsibilities of the DMO have expanded to become the body responsible for establishing a common destination-wide strategy that is understood and implemented by all stakeholders in the sector. This is when the notion of a Destination Management Organisation emerged, along with its 5 fundamental functions (Borzyszkowski, 2013) :

1. Economic driver : to generate new income and employment.
2. Community marketer : to communicate the most appropriate image to target visitors.
3. Industry coordinator : to provide a clear focus and encourage less industry fragmentation, i.e. promote coordination.
4. Builder of community pride : to enhance quality of life for residents and visitors.
5. Quasi-public representative : to add legitimacy for the industry and protection to visitors.

Despite this shift, Pike and Page (2014) highlight that most DMOs still focus on marketing, with little attention to management as a whole. Yet, theoretically, the DMO is supposed to have the necessary knowledge to formulate a competitive strategy and to play a key leadership role in aligning the resources of stakeholders, i.e. to stimulate competition (cf. 1.1.B), which is not always an easy task given their disparate nature.

This management role involves collecting, filtering and analysing data, both internal and external. The collection of internal sources aims to assess the strengths and weaknesses of the destination and is done through the various stakeholders. As for external sources, the objective is to identify the competitive environment, opportunities and threats, as well as future trends that may shape the tourism sector (Sheehan et al., 2015).

DMOs are also often criticized for their lack of flexibility and inability to reinvent themselves and make substantive changes in response to radical modifications occurring in their external environment, criticisms that are more present and relevant than ever during this period of health crisis. Every DMO should then be in the position to answer the questions "Where are we going? " and "What are we here for?" (Gretzel et al., 2006). Otherwise, no other stakeholder of the destination will be able to answer them.

In short, the ideal modern DMO is the one that links the disparate elements that make up the destination, by forming a coalition of many organisations representing different interests but working towards a common goal to ensure the competitiveness and sustainable success of the destination (UNWTO, n.d.).

## 1.2. Shaping the future of leisure travel

It is impossible to write a thesis on leisure tourism in 2022 without mentioning the covid-19 crisis. The aim of this section is not to go back over the crisis itself or the devastating effects it has had on the sector, both of which are well known. Instead, what is interesting is to examine the trends that this crisis has generated and that are likely to persist over time, as well as the way the leisure travel sector will return to the new normal.

A first important trend for destinations is the change in the lifestyle of urban people in particular. Most of them used to eat out, spend nights out with friends, go to shows and concerts, visit museums... Some resumed these habits, but others found the lockdown an opportunity to question them and refocus on the essentials and on a certain form of simplicity. These people have finally adopted a more rural lifestyle, spending more time with their families, cooking and gardening, or exercising outdoors. This bond that they have established with their households during the lockdown will not easily be broken.

An internet survey carried out by the audience targeting company GlobalWebIndex - GWI (2021) on nearly 700 000 users in 46 different countries aged 16 to 64 confirms this new trend. Indeed, in 2018, when asked "Which of these things are you interested in?", the main destination-related answers were: "Eating out" at 47%, "Live events" at 37%, "Museums/galleries" at 32% and "Theatres" at 29%. By mid-2020, the same answers were less common: only 39% answered "Eating out", 32% "Live events", 28% "Museums/galleries" and 25% "Theatres". Some consumers have therefore lost interest in activities that represent major revenue streams for destinations, and there is no guarantee that this interest will return, as it has shifted to other activities.

The same GWI report highlights another trend, related to mobility: consumers now prefer a short walk or a bike ride, instead of driving or boarding a train or other public

transport as was previously the case. This growing appeal for soft (or active) mobility, already noticeable to a lesser extent before the health crisis, is an element that destinations should take into account in their policies.

A trend that has also been noticeable for several years but has accelerated as a result of the covid-19 crisis is the use of digital. Online shopping was very popular during the lockdown and is set to continue: 49% of consumers expect to shop online more frequently after the health crisis. At the same time, they are becoming more demanding about their e-commerce experience, with 29% wanting it to be entertaining. Although the majority of tourists were already booking their trip online, this trend also applies to the purchases they make on site. This suggests that if destinations are to meet the consumer's needs, they should embrace digital to provide the most seamless and entertaining experience possible.

As far as tourist traffic is concerned, it is arriving at a new normality or next normality as McKinsey & Company calls it (Sneader & Singhal, 2021). Traditionally, leisure tourism rebounds faster than business tourism. This was the case, for example, after the 2008-2009 crisis, when it took leisure tourism 2 years to recover, compared to 5 years for business tourism. The additional factor in this covid-19 crisis is the health dimension in addition to the economic dimension, and the confidence of tourists in their safety. This explains why the recovery is likely to take longer than in the previous crisis. In practice, confidence is gradually returning, but not uniformly so among tourists. It depends largely on the country of origin, its health situation and the progress of vaccination in that country.

Generally speaking, leisure tourism is a source of less concern than business tourism, since the desire to explore and enjoy is part of human nature, although this desire is expressed initially through domestic travel and then increasingly further afield as confidence is regained. In other words, domestic travel will lead travel recovery (Krishnan et al., 2021).

## Chapter 2 – Research question and methodology

### 2.1. Research question

As a reminder, the research question is : **What is the current value and attractiveness of Brussels as a tourist destination and how can it be enhanced through cultural heritage ?**

The objective of this thesis is therefore twofold :

- ✓ Establish the position of Brussels in the tourism market, its strengths and weaknesses, focusing mainly on its inherent value and how it is perceived by tourists
- ✓ Analyse how this position can be improved through its cultural heritage

### 2.2. Methodology

Two data collection tools have been used to answer the research question:

1. The collection of existing statistical data which aims to analyse the figures of tourism in Brussels, their evolution but also to compare them with those of competing destinations. A quantitative study on the perception of Brussels by national and international tourists has also been analysed, as well as the action plan of the DMO of Brussels, namely visit.brussels, and several documents presenting the cultural heritage of Brussels. This collection of existing data corresponds to Chapter 3 - Setting the scene.
2. The interview of 6 Brussels tourism and/or cultural heritage stakeholders, with the aim of gathering their opinions, intentions and perceptions on various subjects in order to achieve a number of operational objectives on this basis :

#### **Primary operational objectives**

- Determine whether Brussels is judged to be sufficiently attractive (both at national and international level) by Brussels tourism stakeholders
- Determine the importance of Brussels' cultural heritage for Brussels tourism stakeholders
- Define possible ways of making Brussels' cultural heritage more attractive to national and international tourists

### **Secondary operational objectives**

- Determine whether Brussels has its own identity that distinguishes it from other European destinations, according to Brussels tourism stakeholders
- Determine the level of collaboration between the various Brussels tourism stakeholders
- Define the primary target of the various Brussels tourism stakeholders
- Determine the feasibility and interest for Brussels to promote Belgium as a global destination

The interviews were conducted in French and their transcripts can be found in Appendix 1. The interviews were semi-directed, which means that:

- An interview guide was prepared in advance with the questions to be asked to each stakeholder. However, a certain amount of freedom was left to the interviewee, since with the exception of the first question concerning the overall attractiveness of Brussels, the order of the other questions depended entirely on the subjects addressed by the interviewee.
- It could happen that certain questions were not asked because the interviewee had already answered them beforehand by sharing their opinion on a previous question.
- Unprepared sub-questions could appear during the interview, if it seemed useful to deepen a point raised by the interviewee.
- In order to stimulate the exchange of ideas, the interviewee was sometimes asked to react to the comments made by another expert interviewed before them.

On the next pages, the presentation of the 6 experts interviewed and the interview guide, in which the questions have been sorted according to the subject they deal with and the operational objective they address. Each expert has given their consent for their interviews to be recorded and used non-anonymously in this thesis.



## PATRICK BONTINCK



Organisation : Visit.brussels

Position : CEO

Date of the interview : 7 March 2022

Place : Remote

Duration : 25 minutes

After graduating from the Hotel School in Lausanne, Patrick Bontinck spent the first 15 years of his career at the Belgian hotel group Martin's Hotels, where he successively held the positions of General Manager and COO. Since 2010, he has been the CEO of visit.brussels, which is the Destination Management Organisation (DMO) of Brussels. Concretely, this non-profit organisation is in charge of developing tourism policy in terms of business and leisure tourism for the Brussels Region. It is thereby also responsible for cultural promotion and the development of events in public spaces.

## LUDOVIC GOETHALS



Organisation : Square Circle

Position : Partner

Date of the interview : 8 March 2022

Place : Remote

Duration : 30 minutes

Ludovic Goethals is currently a partner at Square Circle, a management and communication consulting firm that assists companies in change and transformation. One of his clients is the Pandox group, a real estate company present in Brussels through a few dozen hotels (including Hilton Grand Place), which asked them to manage the communication of the group Ambitious Brussels. This association brings together several major hotel groups in Brussels, in addition to Pandox: Everland, NH Hotel, Thon Hotel, Accor and Radisson. It aims to exploit the untapped potential of Brussels in terms of tourism.

## THIERRY WAUTERS



Organisation : Urban.brussels

Position : Head of Cultural Heritage

Date of the interview : 11 March 2022

Place : Urban.brussels Offices

Duration : 30 minutes

After graduating in Botanical Sciences at the ULB, Thierry Wauters was responsible for coordinating the Natural Heritage Department of the Directorate for Cultural Heritage for 20 years. In 2013, he became Director of this same Directorate at urban.brussels, which is an administration of the Brussels Region that, among other things, implements the regional policy on movable and immovable cultural heritage. Since 2004, he has also been President of Halles Saint-Géry, a space for exhibitions and events located in the heart of Brussels that offers a hybrid programme of exhibitions, conferences and performances.

## WIM NICOLAÏ



Organisation : Bookingdesk.brussels

Position : Managing Director

Date of the interview : 14 March 2022

Place : BECI Offices

Duration : 45 minutes

Wim Nicolaï has spent more than 20 years in the Brussels hotel industry, holding various positions in internationally renowned hotels, managing an independent event booking service for which he handled the purchase of accommodation for the majority of the largest international events in the capital, and becoming in 2010 the Managing Director of the Brussels Booking Desk. This free service founded by the Brussels Hotel Association (BHA), visit.brussels and BECI (Brussels Chamber of Commerce), aims to provide a user-friendly online booking experience for event organisers looking for accommodation solutions in Brussels.

## FRÉDÉRIC MESEEUW



Organisation : BOZAR

Position : Institutional Advisor

Date of the interview : 16 March 2022

Place : Remote

Duration : 30 minutes

Frédéric Meseeuw holds a master's degree in European politics and is currently an Institutional Advisor for the Centre for Fine Arts of Brussels (BOZAR), where he has been working on European projects in both the artistic and political fields since 2011. BOZAR is an institution that provides a diversified programme of concerts and exhibitions integrated in a multidisciplinary offer (debates, theatre, cinema, literature and more). Previously, he worked with a wide range of European networks and projects promoting culture at the European level in the framework of his consultant position at KEA European Affairs.

## SÉVERINE PROVOST



Organisation : Be Culture

Position : General Manager

Date of the interview : 29 March 2022

Place : Remote

Duration : 25 minutes

Séverine Provost founded Be Culture in 1999, a communication agency specialised in the cultural sector, active in Belgium but also abroad through its five international partners in Paris, Berlin, London, Amsterdam and Milan. It offers tailor-made communication campaigns, both press and web, for institutions, festivals and artists in all artistic fields (architectural heritage, visual arts, music, film, literature and more). She is also part of the think tank of the Brussels 2030 project, which aims to work on Brussels' candidacy to be the European Capital of Culture in 2030, and to promote it afterwards.

INTERVIEW GUIDE		
Subject	Operational objective	Question
<b>Attractiveness and value of Brussels as a tourist destination</b>	Determine whether Brussels is judged to be sufficiently attractive (both at national and international level) by Brussels tourism stakeholders	In your opinion, is Brussels currently an attractive enough destination for both national and international tourists ? What makes you think so ?
	Determine whether Brussels has its own identity that distinguishes it from other European destinations, according to Brussels tourism stakeholders	Do you find that Brussels stands out enough from other European destinations ? In other words, does Brussels have its own identity as a tourist destination ?
<b>Collaboration between Brussels tourism stakeholders</b>	Determine the level of collaboration between the various Brussels tourism stakeholders	Do you consider that the collaboration between all the Brussels tourism stakeholders is effective or that a better collaboration is necessary?
<b>Brussels' cultural heritage</b>	Determine the importance of Brussels' cultural heritage for Brussels tourism stakeholders	According to you, what are the main reasons why a leisure tourist comes to Brussels ? Is cultural heritage one of them ?
	Define possible ways of making Brussels' cultural heritage more attractive to national and international tourists	Do you think there are ways to make Brussels' cultural heritage more attractive to tourists ?  Today, there is a desire among tourists to be more

		actors of their experiences, and less spectators. Is this a trend that you have personally witnessed, and have you taken it into account in your strategy ?
<b>Alignment or not of strategic objectives</b>	Define the primary target of the various Brussels tourism stakeholders	In the future, what is the profile of tourist who is currently not or not very attracted to Brussels that you would like to attract ?
<b>Promotion of the destination Belgium</b>	Determine the feasibility and interest for Brussels to promote Belgium as a global destination	In your opinion, should Brussels be promoted as a single destination, or should it be promoted as part of the more global Belgium destination ?

## Chapter 3 – Setting the scene

### 3.1. What is the current position of Brussels as a travel destination ?

#### A. Perceived image and value of Brussels

*All data used to assess the image of Brussels among national and international tourists comes from a survey published by visit.brussels and conducted by iVOX in early 2021 : Cultural and tourist consumption during the covid crisis: behaviour and confidence. Beyond trying to identify the behaviour of tourists during the covid crisis, this survey seeks to reflect the image that tourists have of Brussels. It was carried out among 400 Belgian and 900 international respondents from France, Germany and the Netherlands.*

##### *a. At a domestic level*

According to the visit.brussels survey (2021), 40% of Belgians have never been attracted to Brussels. This figure rises to 48% for people over 55 years old, while it falls to 37% and 34% respectively for the 18-34 and 35-54 years old. By contrast, no significant difference appears to exist between Walloons and Flemings in terms of their perception of Brussels as a tourist destination.

Interestingly, beyond age, there are strong disparities according to the travel habits of each respondent:

- For those who most often go on city trips on their own, Brussels seems to be an attractive destination, with only 17% of them stating that they have never been attracted to Brussels
- 35% of those who usually travel with their partner have never been attracted to Brussels
- 40% of those who prefer to go on city trips with friends have never been attracted to Brussels
- Those who usually travel as a family with children are the least attracted to Brussels, with 44% of them stating that they have never been attracted to Brussels

In view of these figures, it can be concluded that Brussels does not have a good overall image at a national level. This is particularly true among the over 55-year-old population and among families. Only people travelling alone seem to have a fairly positive perception of Brussels.

#### *b. At an international level*

At an international level, the image of Brussels seems to be less negative: only 20% of international respondents have never been attracted to Brussels.

German respondents follow the same pattern as Belgians, with older respondents being less attracted to Brussels (29%) than 18-34 years old (24%) and 35-54 years old (16%). The opposite observation can be made for French and Dutch respondents, since the youngest respondents seem to be the least attracted to Brussels (25% and 21% respectively), followed by the 35-54 years old (20% and 21% respectively), with the people over 55 years old having a more favourable perception of Brussels (13% and 15% respectively).

### **B. Profile and satisfaction of tourists**

*All data for this section comes from The Art cities research 2018 published by Toerisme Vlaanderen, in partnership with visit.brussels among others, and conducted by Kantar. This survey explores the reasons why tourists come to Brussels, but also to Antwerp, Bruges, Ghent, Leuven and Mechelen, as well as their profile and their level of satisfaction after their stay. A total of 3 873 leisure tourists were surveyed in the field, of which 663 were Belgian. The remaining respondents come from 11 different countries: The Netherlands, Germany, the United Kingdom, France, Italy, Spain, the United States, Russia, Japan, China and Switzerland.*

*Toerisme Vlaanderen and visit.brussels have both published a report on this survey. Due to some information being missing from the visit.brussels report, such as the comparison with other Belgian cities, the Toerisme Vlaanderen report was used in priority, in particular to analyse the satisfaction of tourists.*

The average age of a tourist coming to Brussels is 42, slightly younger than the average age of tourists travelling to Antwerp, Bruges, Ghent, Leuven or Mechelen, which is 44. This difference is mostly attributable to the share of tourists over 65 years old, which represents only 4% in Brussels, whereas it represents an average of 13% in the other 5 Belgian cities.

As can be seen in the following chart, Belgian tourists who spend at least one night in Brussels are on average the oldest (51 years old), with less than 40% of them being under 50 years old. If we combine this with the survey on the image of Brussels, which showed that Belgians aged 35 to 54 were the most attracted to Brussels, the capital appears to be the most popular among 50 to 54 years old at a national level.

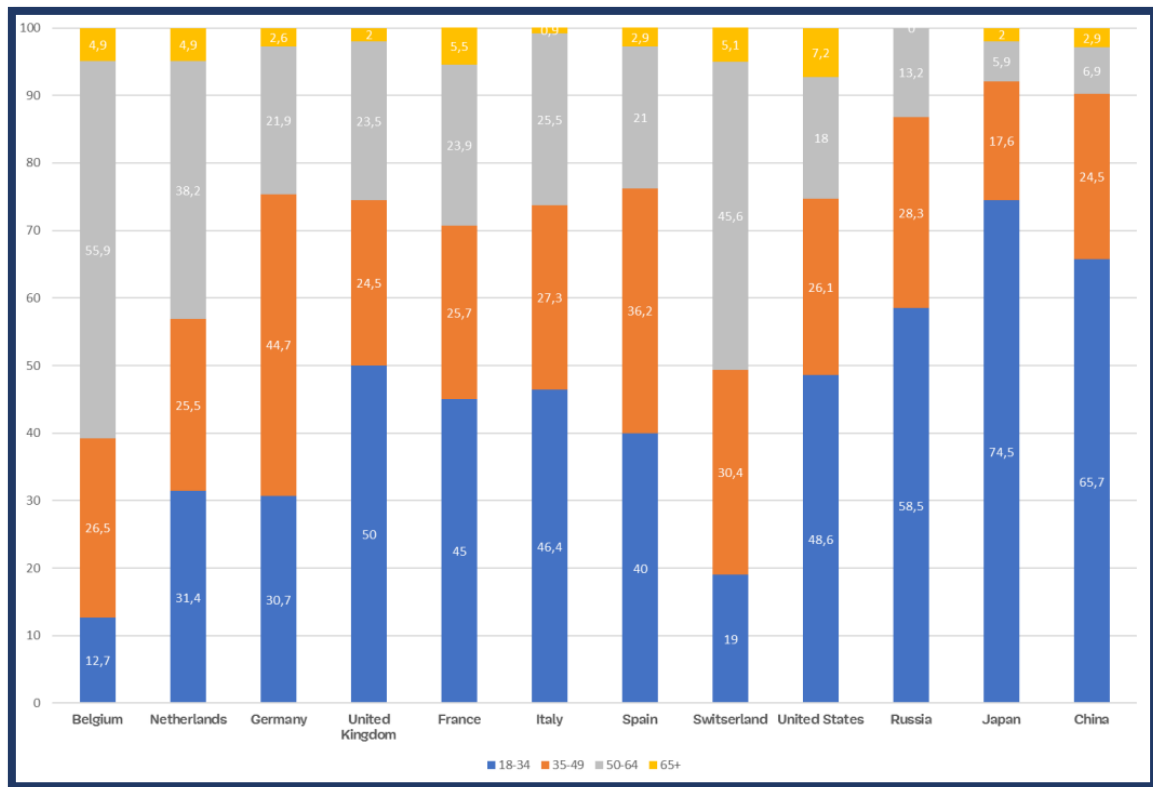


Figure 3: Age of overnight visitors in % (visit.brussels, 2018)

International tourists who spend at least one night in Brussels are younger on average: almost 50% of Swiss tourists are under 50 years old, as are 57% of Dutch tourists and more than 70% of every other nationality surveyed, namely German, English, French, Italian, Spanish, American, Russian, Japanese and Chinese tourists. The average Chinese tourist happens to be the youngest, being 32 years old.

Of all the overnight tourists in Brussels, whether Belgian or international, 35% are repeat visitors, meaning that they had already been to Brussels at least once before. This is especially the case for Belgians (60% of whom are repeat visitors), Dutch (42%) and French (39%), less for Americans (8%), Chinese (8%) and Japanese (6%).

It should also be added that 17% of all tourists who visit Brussels do so with children. These are more likely to be same-day visitors (excursionists), as 65% of them do not stay overnight in Brussels.

With regard to the reasons for coming to Brussels, they vary depending on the type of visitor, either same-day visitor or overnight visitor. For the latter, the top 5 reasons for coming to the capital are :

1. Heritage (35%)
2. Reputation of the city (24%)



3. Local products (20%)
4. Rich history of the city, on a par with good food and drinks, pleasant atmosphere and entertainment possibilities (18%)
5. Visiting friends and family, on a par with shopping possibilities (15%)



Figure 4: Motivation for visiting Brussels (visit.brussels, 2018)

For same-day visitors, many of the same elements are mentioned but not in the same order :

1. Entertainment possibilities (25%)
2. Pleasant atmosphere (22%)
3. Heritage, on a par with visiting friends and family and shopping possibilities (19%)
4. Good food and drinks (17%)
5. Non-art related museums (14%), for example The Chocolate Museum or Autoworld

Other elements play an important role in the decision to come to Brussels, be it for one day or more, mainly its accessibility from the tourist's home city or country (29%), recommendations from friends and family (24%), a previous positive experience (23%), the price of accommodation (22%), the price of transport to get there and the family-friendly aspect of the destination (16%). Its proximity to other destinations also seems to

play a role, as no less than 33% of tourists visiting Brussels combine this visit with other cities : Bruges at 21%, Ghent at 10%, Antwerp at 7% and other destinations outside Belgium at 6%.

When asked what characterises the city, 20% of these tourists coming to Brussels describe it as "nice and beautiful", 16% answer "World city, cultural diversity, immigration", 13% "Chocolate", 13% "Europe, European capital" and 12% "Architecture".

Concerning the search for information before the trip, 62% of overnight visitors use websites (in priority the booking website or the accommodation website), 21% use friends and family and 20% use travel guides. Social networks represent a source of information for only 11% of them, even if their importance is increasing as people under 35 years old use them twice as much as people over 50 years old to prepare their trip.

During the trip, information is looked for equally on websites and in the Tourism Office (33%), although the latter is most popular among 50-64 years old, who are twice more likely to visit it than 18-24 years old. Social networks (28%) and travel guides (27%) are also used extensively, while the visit.brussels website is consulted by only 14% of overnight visitors.

As far as expenses during the trip are concerned, they are roughly the same between the different nationalities, ranging from 125€ to 155€ per day on average. Only the Belgian tourist stands out, spending an average of 161€ per day in Brussels. Lastly, it is worth noticing that these average daily expenses increase quite logically with age: 109€ for 18-24 years old, 119€ for 25-34 years old, 145€ for 35-49 years old, 147€ for 50-64 years old and 219€ for the over 65 years old.

Now, the satisfaction of tourists after their trip is another important factor to analyse.

city	Total	Brussels	Other cities*	Antwerp	Bruges	Ghent	Leuven	Mechelen
n (non weighted)	3734	1212	2522	594	958	495	213	262
Score 1 - 6	3	6	1	2	2	0	0	1
Score 7 - 8	55	61	50	50	47	53	65	65
Score 9 - 10	42	31	48	49	52	47	35	34
Average score	8,31	7,99	8,51	8,47	8,56	8,54	8,33	8,35

Figure 5: General satisfaction about the destination (Toerisme Vlaanderen, 2018)

This table shows that Brussels has a significantly lower satisfaction score than Antwerp, Bruges, Ghent, Leuven and Mechelen. This is due to a higher proportion of relatively satisfied tourists (61%) compared to very satisfied tourists (31%). The share of

unsatisfied tourists is also noteworthy, standing at 6%, which is 5% higher on average than the other 5 Belgian destinations.

A more detailed analysis of the satisfaction and dissatisfaction factors indicates that the two elements that drive up the satisfaction scores for Brussels are the quality of the accommodation and the friendliness and hospitality of the locals. By contrast, the element that contributes most to the decrease in tourist satisfaction is the cleanliness of the city.

Nevertheless, when comparing these scores with those of Antwerp, Bruges, Ghent, Leuven and Mechelen, it can be seen that Brussels performs significantly worse on all of the following elements: the supply of attractions and activities during the day and night, the quality of these attractions and activities, the cleanliness in the city, the quality of the restaurants and bars and the friendliness and hospitality of the locals. Only the general price-quality ratio of the destination distinguishes Brussels positively from its competitors on a national level, the quality of the accommodation being judged similar.

city	Total	Brussels	Other cities*	Antwerp	Bruges	Ghent	Leuven	Mechelen
n (non weighted) =	3734	1212	2522	594	958	495	213	262
quality accommodation	8,05	8,03	8,06	7,79	8,20	8,05	8,11	8,39
attractions and activities supply during the day	7,97	7,77	8,09	7,90	8,29	7,90	8,00	8,01
attractions and activities supply during the evening	7,85	7,69	7,96	8,14	7,94	7,72	8,00	8,04
quality of attractions and activities	8,04	7,83	8,17	8,15	8,30	7,93	8,01	8,07
cleanliness in the city	8,03	7,43	8,41	7,80	8,85	8,26	8,08	8,42
Quality of restaurants, bars and pubs	8,04	7,86	8,15	8,10	8,16	8,18	8,16	8,22
general price - quality on the destination	7,62	7,71	7,56	7,67	7,34	7,81	7,88	8,04
friendliness and hospitality of the locals	8,34	8,12	8,48	8,19	8,68	8,58	8,20	8,25

Figure 6: Satisfaction about the destination in detail (Toerisme Vlaanderen, 2018)

Two other elements not presented in this table may also explain Brussels' satisfaction score: 40% of tourists felt it was too crowded in certain locations in the city (compared to an average of 28% for Flemish cities) and 12% of them did not feel safe in the city (compared to an average of 2% for Flemish cities).

### C. Key figures of tourism in Brussels

*For the statistical analysis, the year 2019 was chosen as the reference year to assess the current position of Brussels in the leisure tourism market. The years 2020 and 2021 indeed introduced inequalities between the different European destinations, as they were not all subject to the same sanitary measures.*

*All data concerning Brussels is taken from the Toerisme Vlaanderen report (2022). This report has been selected as it provides more detailed data than other available reports. However, the key figures, i.e. the number of arrivals and the number of overnight stays, are backed up by the Statbel report (2020), the Belgian reference office for statistical data.*

This section provides a simple analysis of the figures, without going into detail or trying to understand the reasons behind them. However, these figures will be discussed in the next chapter, Chapter 4 – Case study discussion.

	2019	2018	Growth	2015	Growth
<b>Arrivals</b>	3 919 119	3 712 055	5,58 %	3 353 899	16,85 %
<b>Overnight stays</b>	7 428 718	6 993 061	6,23 %	6 443 213	15,30 %
<b>Average length of stay *</b>	1,90 days	1,88 days	1,06 %	1,92 days	- 1,04 %

\* *Overnight stays ÷ Arrivals*

As can be seen, the number of overnight stays in Brussels has grown significantly since 2015, with around 1 000 000 additional stays in 5 years. The growth has especially speeded up between 2018 and 2019, with just under 500 000 additional overnight stays. The length of stay has remained roughly the same, decreasing from 1.92 to 1.88 days.

When looking at the evolution over 10 years, the number of overnight stays in 2010 was 5 556 308 and the average length of stay was 1.85 days. In 10 years, there has therefore been a 33.70% increase in the number of overnight stays in Brussels and a 2.70% increase in the average length of stay.

For both arrivals and overnight stays, the distribution of the purpose of the visit is the same: about half for leisure tourism (48%), and the other half for business tourism (52%). This marks an improvement in the share of leisure tourism since 2015, when it only accounted for 45%.

These figures seem to indicate that tourism in Brussels is doing well, with constant growth in recent years. It should also be pointed out that the average length of stay is rather low, less than 2 days, which means that a typical tourist only spends one night in Brussels.

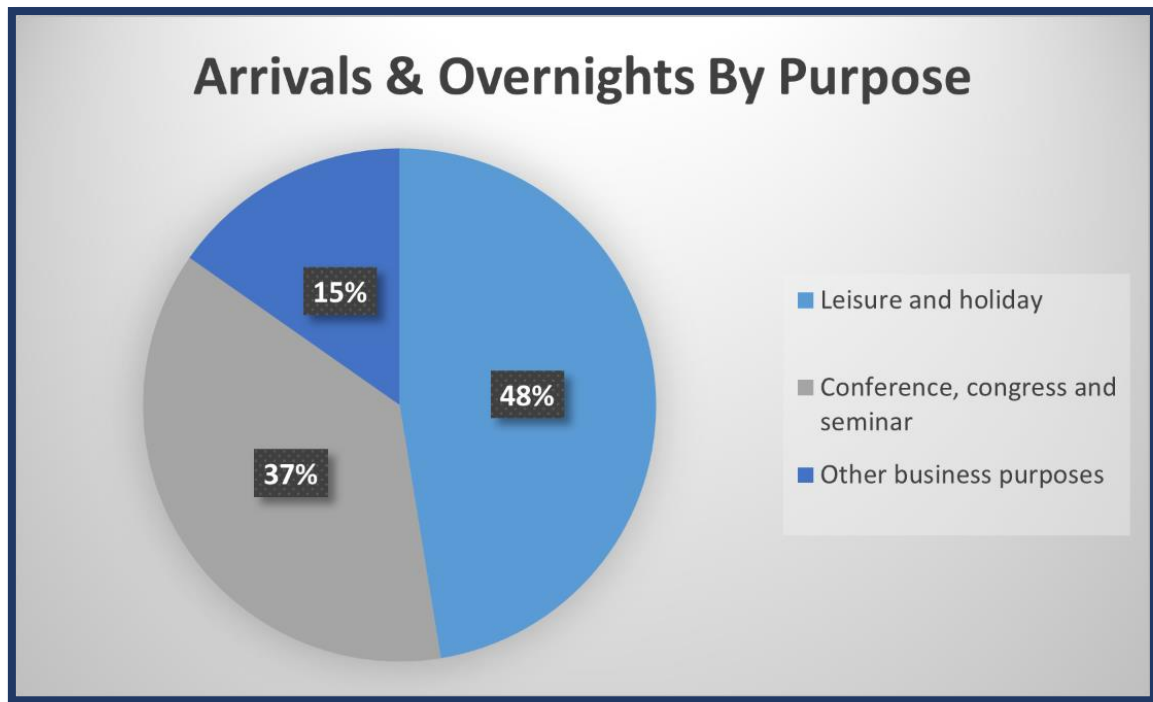


Figure 7: Arrivals & overnights by purpose

Now, it might be interesting to compare these figures and their evolution with those of a few other Belgian and European destinations comparable to Brussels, namely Ghent (metropolitan area), Lille (metropolitan area) and Berlin.

### **Ghent (metropolitan area)**

*All data concerning Ghent is taken from the Toerisme Vlaanderen report (2022).*

Ghent shares many similarities with Brussels. Both are cosmopolitan metropolises, with no less than 156 nationalities represented in Ghent (European Commission, 2016). They have a similar surface area (156.18 km<sup>2</sup> for Ghent compared to 132 km<sup>2</sup> for Brussels) and are the two largest cities in Belgium after Antwerp. Culture is also at the heart of the city of Ghent, notably with many art nouveau and art deco architectural treasures, just like Brussels.

	2019	2018	Growth	2015	Growth
<b>Arrivals</b>	689 019	625 340	10,18 %	566 275	21,68 %
<b>Overnight stays</b>	1 288 261	1 160 864	10,97 %	1 056 797	21,90 %
<b>Average length of stay</b>	1,87 days	1,86 days	0,54 %	1,87 days	None

Ghent seems to have experienced an even stronger growth in tourism than Brussels, with an increase in overnight stays of more than 20% over 5 years, and almost 60% over 10 years (805 230 overnight stays in 2010). The 11% growth between 2018 and 2019 tends to show that this upward trend is set to continue and possibly speed up.

A point of attention can however be raised on the average length of stay, which, while similar to that of Brussels, has decreased from 1.92 days to 1.87 days between 2010 and 2019. This decrease may be related to the increase in the share of Belgian travellers in the total number of travellers travelling to Ghent. Indeed, Belgian travellers accounted for 30% of them in 2010 whereas they accounted for 32% in 2019. The high share of foreign travellers in Ghent can be explained by its proximity to the Netherlands, which implies a significant number of Dutch travellers, representing 16% of all overnight stays in Ghent.

One thing that has remained unchanged over the past 10 years is the predominance of leisure tourism over business tourism, with the former accounting for 68% of overnight stays in Ghent, making the city a clear leisure tourism destination.

### **Lille (metropolitan area)**

*All data concerning Lille is taken from the 2019 and 2020 reports of the Observatoire du tourisme métropolitain published by the Métropole Européenne de Lille (MEL), as well as the Stratégie de développement touristique de la Métropole Européenne de Lille (Axente, 2018) equally published by MEL, both using statistics from INSEE, the French National Institute of Statistics and Economic Studies.*

Located less than 100 km from Brussels, Lille has a surface area of 672 km<sup>2</sup> and is home to approximately 1 200 000 inhabitants, as is Brussels, although it only has a surface area of 132 km<sup>2</sup>. Lille and Brussels are similar in many ways, besides their location and climate, and have in fact signed a cooperation agreement in 2019 concerning, among other things, the attractiveness of the two cities through the strengthening of accessibility between them, the promotion of their tourist territories through a partnership between

Hello Lille and visit.brussels, and the cooperation in the fields of creative industries and contemporary art (Demollien, 2019).

	2019	2018	Growth	2015	Growth
<b>Overnight stays</b>	2 459 570	2 443 929	0,64 %	2 382 490	3,24 %
<b>Average length of stay</b>	1,54 days	1,56 days	- 1,28 %	<i>Unknown</i>	/

Of the 2 459 570 overnight stays recorded in 2019, 69% were business and 31% were leisure. This distribution of the purpose of the visit was similar in 2018 and shows a clear predominance of business tourism over leisure tourism, where Brussels has managed to strike a balance between the two. Lille's tourism growth is also significantly lower than that of Brussels, respectively 0.64% as compared to 6.23% between 2018 and 2019 and 3.24% as compared to 15.30% between 2015 and 2019.

It should be mentioned that one contextual element has been particularly unfavourable to Lille, namely the Brexit. Although it was not effective until 2020, the procedure was initiated in 2017 and the number of English travellers has been steadily decreasing in recent years. Yet, English travellers represented, by far, the largest part of international travellers coming to Lille. For example, they accounted for 27% of them in 2018, a figure that has dropped to 20% in 2019, representing a 26% fall.

This fall has resulted in the increased importance of domestic tourism, which accounted for 78% of total travellers in 2019, up from 75% a year earlier. This can explain the 1.28% drop in the average length of stay, as domestic travellers come from a shorter distance, and therefore tend to stay for a shorter time. As a result, the average length of stay in Lille was only 1.54 days in 2019, even shorter than the average 1.90 days spent in Brussels.

This being said, Lille also had an element playing in its favour, by hosting 6 matches of the 2016 European Football Championship, including a quarter final. That year, Lille achieved a record annual number of overnight stays of 2 480 530, a figure that has not been equalled since. Furthermore, while Lille was more affected by the effects of Brexit than Brussels, it was obviously less affected by the terrorist attacks that targeted the Belgian capital on 22 March 2016. Nevertheless, despite an unfavourable context, Brussels has achieved a substantial growth over the last five years before covid, something that Lille has not been able to do.

## **Berlin**

*All data concerning Berlin is taken from the 2017, 2019 and 2020 reports of visitBerlin, the DMO of the city of Berlin, using statistics from Amt für Statistik Berlin-Brandenburg, the central service provider in the field of official statistics for the Berlin-Brandenburg region.*

For this last comparison, choosing another city that benefits from the capital city effect is an interesting option. However, many capitals in our neighbouring countries, such as Paris, Amsterdam or London, suffer from over-tourism. Berlin seems to be the least prone to this issue and thus more suitable for the comparison.

	2019	2018	Growth	2015	Growth
<b>Arrivals</b>	13 963 345	13 502 552	3,41 %	12 369 293	12,89 %
<b>Overnight stays</b>	34 124 364	32 871 634	3,81 %	30 250 066	12,81 %
<b>Average length of stay</b>	2,44 days	2,43 days	0,41 %	2,45 days	- 0,41 %

If Berlin has experienced a slightly lower growth in tourism than Brussels over 5 years, this is not the case when looking at the evolution over 10 years. Between 2010 and 2019, Berlin went from 20 795 643 to 34 124 364 annual overnight stays, equivalent to a 64% growth, almost twice the growth experienced by Brussels. Moreover, this growth in the number of overnight stays has been accompanied by a growth in the average length of stay, from 2.30 days to 2.44 days.

Both the number of overnight stays and the average length of stay increased mainly between 2010 and 2015, as the increase in overnight stays slowed down from 2015 and the average length of stay has remained the same since. The dynamics of recent years are therefore more encouraging for Brussels, as confirmed by the rise in overnight stays between 2018 and 2019, which is +3.81% for Berlin and +6.23% for Brussels.

While the decrease in the average length of stay in Ghent and Lille over the last 10 years can be explained by the increase in the share of domestic travellers, the increase in the average length of stay in Berlin can be explained by the decrease in the share of domestic travellers. In 2010 they represented 59% of the total number of travellers, in 2019 they represented 55%. Like Lille, English travellers represent the largest part of international travellers coming to the German capital. Less dependent on English tourists than the French city, Berlin has nevertheless suffered the negative effects of Brexit, losing 6.5% of its British clientele between 2018 and 2019.



Finally, from a contextual point of view, it is important to remember that Berlin was also the victim of a terrorist attack the same year as Brussels, on 19 December 2016.

#### *a. Domestic travellers*

	2019	2018	Growth
<b>Arrivals</b>	941 005	845 215	11,33 %
<b>Share of origin * in arrivals</b>	24,01 %	22,77 %	5,45 %
<b>Overnight stays</b>	1 653 433	1 489 579	11 %
<b>Share of origin * in overnight stays</b>	22,26 %	20,05 %	11,22 %
<b>Average length of stay</b>	1,76 days	1,76 days	None

\* *Domestic travellers' arrivals or overnights ÷ Total arrivals or overnights*

The first observation is that domestic tourism, i.e. Belgian travellers, alone accounts for almost a quarter of travellers' arrivals in Brussels, a share that is steadily increasing. By contrast, and quite logically, the length of stay of domestic travellers is lower than the average, amounting to only 1.76 days.

In terms of the purpose of the visit, business tourism is more important (60%) than leisure tourism (40%) for Belgian travellers staying in Brussels (see Appendix 2 – Additional statistical analyses).

#### *b. European travellers*

	2019	2018	Growth
<b>Arrivals</b>	2 064 314	1 998 174	3,31 %
<b>Share of origin * in arrivals</b>	52,67 %	53,83 %	- 2,15 %
<b>Overnight stays</b>	3 880 207	3 711 956	4,53 %
<b>Share of origin * in overnight stays</b>	52,23 %	53,08 %	- 1,60 %

<b>Average length of stay</b>	1,88 days	1,88 days	None
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\* *European travellers' arrivals or overnights ÷ Total arrivals or overnights*

European travellers' arrivals and overnight stays in Brussels grew between 2018 and 2019, but less strongly than those of domestic travellers. The European traveller tends to stay slightly longer in Brussels, for both leisure (49%) and business (51%) tourism (see Appendix 2 – Additional statistical analyses).

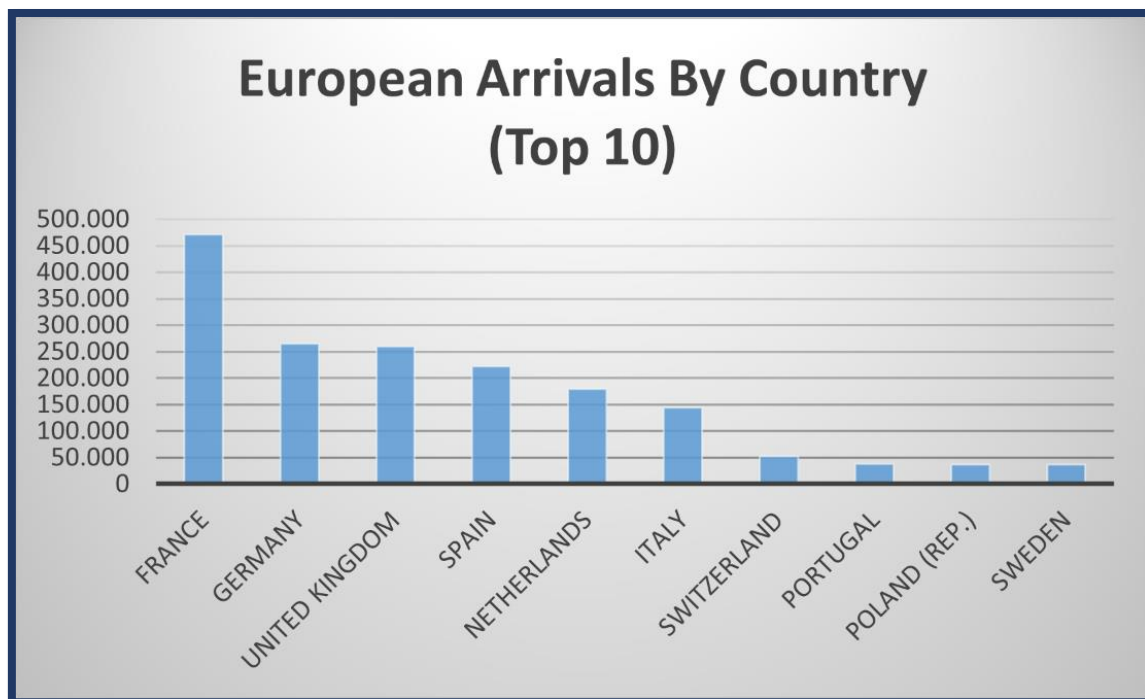


Figure 8: European arrivals by country

Six European countries account for a significant share of travellers arriving in Brussels each year : Italy (144 603), the Netherlands (179 021), Spain (222 207), the United Kingdom (259 712), Germany (264 804) and France (471 441). These countries are all in the top 8 countries of origin of travellers coming to Brussels, which also includes Belgium and the United States.

The same countries hold the top positions among the countries of origin of travellers staying in Brussels, with some of them swapping positions. Spain and Italy gain places in this ranking, since on average a Spanish traveller stays 2.27 days in Brussels and an Italian traveller 2.08 days. This is more than a French (1.71 days), a German (1.89 days), an English (1.81 days) or a Dutch (1.58 days) traveller (see Appendix 2 – Additional statistical analyses). Without knowing what each person spends, attracting a Spanish traveller to Brussels therefore seems more interesting than attracting a Dutch traveller.

### c. North American travellers

	2019	2018	Growth
<b>Arrivals</b>	291 392	279 722	4,17 %
<b>Share of origin * in arrivals</b>	7,44 %	7,54 %	- 1,33 %
<b>Overnight stays</b>	623 992	595 948	4,71 %
<b>Share of origin * in overnight stays</b>	8,40 %	8,52 %	- 1,41 %
<b>Average length of stay</b>	2,14 days	2,13 days	0,47 %

\* North American travellers' arrivals or overnights ÷ Total arrivals or overnights

North American travellers' arrivals and overnight stays have experienced more or less the same growth as those of European travellers, with a slight predominance of business tourism (54%) compared to leisure tourism (46%). The significant difference is in the average length of stay, which is longer for North Americans (2.14 days) than for Europeans and Belgians.

Americans naturally account for the majority of travellers from North America and are in 5th place in the ranking of countries of origin of travellers coming to Brussels with 227 756 travellers per year. Canada (30 818) and Mexico (22 018) are far behind, but Canadians generally stay in Brussels for 2.29 days, while Americans stay for 2.14 days and Mexicans only 1.93 days (see Appendix 2 – Additional statistical analyses).

### d. Other travellers (rest of the world)

	2019	2018	Growth
<b>Arrivals</b>	622 408	588 944	5,68 %
<b>Share of origin * in arrivals</b>	15,88 %	15,87 %	0,06 %
<b>Overnight stays</b>	1 271 086	1 195 592	6,31 %
<b>Share of origin * in overnight stays</b>	17,11 %	17,10 %	0,06 %

<b>Average length of stay</b>	2,04 days	2,03 days	0,49 %
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*\* Rest of the world travellers' arrivals or overnights ÷ Total arrivals or overnights*

Travellers from outside Europe and North America are mostly from the BRIC countries (Brazil, Russia, India, China) and Japan. China and Japan complete the top 10 countries of origin of travellers coming to Brussels with respectively 87 963 and 54 946 travellers per year. It should be mentioned that Chinese travellers stay for a relative short time (1.67 days), compared to Japanese travellers (1.98 days) and especially Brazilian (2.28 days), Russian (2.15 days) and Indian (2.34 days) travellers (see Appendix 2 – Additional statistical analyses).

## 3.2. DMO of Brussels

### A. Visit.brussels

As already mentioned, visit.brussels is the Destination Management Organisation (DMO) of Brussels, i.e. the body responsible for developing tourism offer in partnership with local stakeholders. Its mission also includes promoting and highlighting the competitive advantages of Brussels, to make it an attractive destination (visit.brussels, 2020).

### B. Objectives

In its action plan drawn up in 2020, visit.brussels identifies 7 strategic objectives :

1. Develop an integrated policy to promote the Brussels Region through the deployment of city marketing
2. **Increase the attractiveness of Brussels as a destination for leisure and business tourism**
3. **Strengthen the cultural influence of Brussels thanks to its heritage, cultural offer, bicultural institutions of regional interest, the audio-visual sector and events**
4. Anchor the international presence in Brussels and foster its vocation as the capital of Europe
5. Give particular attention to the dimensions of sustainability and equal opportunities
6. Ensure the administrative functioning of the organisation

7. Contribute to the Region's climate commitments to reduce direct and indirect GHG (greenhouse gas) emissions by at least 40% by 2030 and move towards the European objective of carbon neutrality in 2050

### C. Action plan

For each of the strategic objectives, the actions to be implemented to achieve them are described. Below is an overview of the main actions for each of the first 5 strategic objectives, the 6th being outside the scope of my thesis and the achievement of the 7th depending on the 5th one.

#### **Strategic Objective 1 : City marketing**

The people who are considered to be the most suitable to do the marketing for Brussels are the inhabitants themselves. It is therefore necessary to make them proud of the city, so that they act as local ambassadors, who are so essential to a destination. This inevitably requires making Brussels more pleasant for its inhabitants and thus making it an attractive place to live. To this end, two main actions will be implemented :

- ✓ to promote Brussels as a green city, with soft mobility and easy access to culture, to the Brussels (including expatriates) and Belgian audiences
- ✓ to inform every Brussels resident of the possible activities available within 15 minutes of their home

This city marketing, whether it is aimed at residents or tourists, must also be uniform. With this in mind, it was decided to align the visual identity of the partners in charge of marketing Brussels, so that some coherence and uniformity would emerge.

#### **Strategic Objective 2 : Attractiveness**

There are two main objectives behind this strategic objective: to bring tourists to Brussels and to build their loyalty.

To attract the tourists, the aim is to position Brussels as « a tourist and cultural destination, offering a quality and varied urban life [...] for the various target audiences » (visit.brussels, 2020). This implies, among other things, providing them with valuable information on the cultural offer of the whole city. The wish expressed by visit.brussels is indeed to disperse tourists over the entire territory of Brussels in order to avoid concentration in the hypercentre, i.e. the Grand-Place and its surroundings. Moreover,

by broadening the tourist offer in such a way, the average length of stay should logically become longer.

To gain the tourists' loyalty, the emphasis is on offering them high-quality experience and hospitality. To offer them a high-quality experience, one of the answers is the Brussels Card, which gives free access to 48 museums for 24 hours (29€), 48 hours (39€) or 72 hours (46€), along with discounts on attractions, shops, restaurants and bars. The package comes with an information guide, a city map and a museum map. For an additional fee (8€, 15€ or 19€ respectively), unlimited access to STIB public transport can also be added. However, the Brussels Card does not act directly as a transport title, and a ticket must be collected before the first journey from an automated sales machine, by entering the numbers on the card. To offer them high-quality hospitality, the collaboration with the hotels is essential, in particular through information and training sessions on the evolution of the tourists' needs as identified by the various studies conducted by [visit.brussels](http://visit.brussels).

### **Strategic Objective 3 : Culture**

In addition to the preparation of Brussels' candidacy as European Capital of Culture 2030, which took shape with the creation of the Brussels 2030 think tank bringing together several Brussels cultural players (including Be Culture), the aim is to promote and raise awareness of the cultural richness and diversity in Brussels, represented in particular by the diversity of architectural styles, as well as the elements of Brussels' heritage listed in the UNESCO World Heritage List (more information in the following section - see D. Brussels' Cultural Heritage).

In connection with strategic objective 1, in order for the inhabitants of Brussels and Belgium to be able to act as local ambassadors, it will first be necessary to increase their knowledge of the cultural and architectural heritage of the capital.

In connection with strategic objective 2, which aims to spread tourists over the whole region, cultural events will be distributed more evenly over the entire territory, involving as many municipalities located outside the centre as possible.

### **Strategic Objective 4 : International**

As the capital of Europe, Brussels wants to become a must-see for every European. To achieve this, it specifically plans to increase the attractiveness of its European district and turn it into its USP (Unique Selling Proposition). The importance of this point for

visit.brussels is reflected in the establishment of a dedicated strategic plan for the district, in collaboration with the relevant stakeholders.

Collective governance therefore plays a key role and aims to develop the offer proposed in the European district and to ensure its subsequent promotion, which will be done through a coherent storytelling with a constant graphic universe both offline and online (website and social networks).

Furthermore, the many expatriates present in Brussels constitute a formidable opportunity to make the European capital better known internationally. If expatriates are won over by Brussels, it is highly likely that they will encourage their relatives to visit Brussels, acting as local ambassadors but with an international network. It is thus imperative to ensure that they receive a warm welcome, for example by distributing a digital pack highlighting the Brussels offer to all new expatriates, as well as Erasmus students, EU trainees, diplomats and journalists.

### **Strategic Objective 5 : Sustainability**

One of the best ways to make a destination sustainable is to promote public transportation and soft mobility. Visit.brussels is working with the STIB on various ways to make it easier for tourists to use public transport. As mentioned in strategic objective 2, even with the Brussels Card, access to public transport is not very user-friendly. Soft mobility and especially cycling is encouraged by the "Brussels by bike" map, which proposes discovery walks by bike.

The green areas of Brussels, including the Soignes Forest and the numerous parks, will be better promoted via several channels and via the development of a green walking tourist product based on sustainable development.

The environmental impact of tourism in Brussels will also be analysed in greater depth in order to develop a sustainable action plan on this basis. However, actions have already been taken, including a more sustainable management of events organised or supported by visit.brussels, for example by giving priority to short distribution channels.

## **3.3. Brussels' Cultural Heritage**

### **A. Tangible Heritage**

Many cultural sites in Brussels are on the UNESCO World Heritage List (visit.brussels, 2019) :

- **The Grand-Place** : As mentioned by UNESCO, the Grand-Place is a blend of architectural and artistic styles that is particularly representative of the city of Brussels. This blend can be explained by the transformations it has experienced over the course of its history. Used as a marketplace since the 12th century, the Grand-Place had to be largely rebuilt in the late 17th century after being bombarded by the troops of Louis XIV, and its Gothic City Hall was built in the 15th century. In the following centuries it was further modified and restored.



*Figure 9: The Grand-Place, Brussels (UNESCO World Heritage Centre, n.d.)*

- **Art nouveau houses** : At the end of the 19th century, Brussels became the first city to host art nouveau houses, a genre inspired by the forms of nature and breaking with traditional architectural styles (visit.brussels, 2017). Victor Horta was the pioneer of this new style, and no less than four of his designs are on the UNESCO World Heritage List : The Hôtel Tassel, The Hôtel Solvay, Hôtel van Eetvelde and The Horta Museum, which is in fact the Belgian architect's former home and workshop. This makes Brussels the place to be for any art nouveau lover.





Figure 10: The Horta Museum (UNESCO World Heritage Centre, n.d.)

- **The Stoclet Palace** : Not open to visitors, this luxurious house designed by Josef Hoffmann is a symbol of the art deco genre, which is characterised by geometric and symmetrical forms.



Figure 11: The Stoclet Palace (UNESCO World Heritage Centre, n.d.)

Besides these sites on the UNESCO World Heritage List, there are other major sites in Brussels. Starting with the most emblematic symbols of Brussels: the Manneken Pis, the

Atomium created for the 1958 World Expo and the European institutions, part of which (as well as The Parliamentarium) is open to visitors.



Figure 12: Manneken Pis, The Atomium & The European Parliament (visit.brussels, n.d.)

Near the Grand-Place there is also the Cathedral of Saints Michael and Gudula, another of Brussels' architectural gems in the Gothic style, the Royal Palace or the Coudenberg Palace Archaeological Site.



Figure 13: The Cathedral of Saints Michael and Gudula, The Royal Palace & The Coudenberg Palace (visit.brussels, n.d.)



Lastly, the Belgian Comic Strip Center and the Centre for Fine Arts of Brussels (BOZAR) are additional evidence of Victor Horta's major influence on the city of Brussels. The former is located in an art nouveau style building and the latter is located in an art deco style building, having been designed later by Horta, after the first World War. As a reminder, BOZAR is an institution that provides a diversified programme of concerts and exhibitions integrated in a multidisciplinary offer including debates, theatre, cinema, literature and more.

In addition to the Horta Museum and the Belgian Comic Strip Center, there are many other museums in Brussels, such as the Royal Museums of Fine Arts of Belgium (among which the Magritte Museum), the Musical Instruments Museum, the Natural Sciences Museum, the BELvue Museum (museum on Belgian history), the Brussels City Museum (museum on the history of Brussels), the Chocolate Museum and Autoworld (automobile museum). Art, architecture, music, history, science, gastronomy, automobile... The range of museums in Brussels is highly diversified.

Next to these monuments and sites, there is also the natural heritage, which is more limited in Brussels than in other cities. In fact, in the UNESCO World Heritage List, there are only some parts of the Soignes Forest (270 hectares out of a total of 4 400 hectares), all free of human intervention, to represent the capital.

This is of course a non-exhaustive list of the Brussels tangible heritage and the Royal Gallery Saint-Hubert, the Parc du Cinquantenaire, the Abbaye de la Cambre or the Monts des Arts, to name only a few, are other architectural treasures to be found in Brussels.

## B. Intangible Heritage

The UNESCO Intangible Cultural Heritage List includes two Brussels events (visit.brussels, 2019) :

- **Meyboom** : Every 9 August, a tree is planted near the centre of Brussels, with a parade and festivities. This is the oldest tradition in Brussels, dating back to the 13th century.
- **Ommegang** : Probably better known than the Meyboom, this tradition takes place on the Grand-Place itself two days a year during the summer (end of June-beginning of July) and brings spectators back to the Middle Ages.

Other events attract Belgian and international tourists to Brussels. Among these are the Flower Carpet on the Grand-Place (1 summer weekend every 2 years), the Winter

Wonders (annual Christmas market with an ice rink and some fairground attractions) and the Brussels Summer Festival (music festival). The future of the BSF, which used to take place in August at various locations in the centre of Brussels and which each year hosted a number of international artists in a mainly French-speaking lineup, is however uncertain due to financial difficulties (Lhuillier, 2022).



Figure 14: Ommegang, The Flower Carpet & Winter Wonders ([visit.brussels](http://visit.brussels), n.d.)

## Chapter 4 – Case study discussion

### 4.1. Attractiveness and value of Brussels as a tourist destination

As a reminder, the attractiveness of a destination is determined by the feelings and opinions of the tourists about its perceived ability to satisfy their needs (cf. 1.1.C). Two main attributes influence this perceived value :

1. Attractions : the core of attractiveness. They include natural factors (1), social factors (2), cultural and historical factors (3), events, recreational and shopping facilities (4), and food and drinks (5).
2. Supporting facilities : not at the heart of attractiveness but can influence it, mainly if they are missing or deficient. They include accommodation, transport, energy, cleanliness and more.

Situational factors of the destination, such as the accessibility in terms of cost and time to reach it, can influence attractiveness as well.

The attractiveness of a destination is consequently achieved in two stages: firstly, the attractions and supporting facilities must have the actual ability to satisfy the needs of the target tourists, and secondly, through communication (including word-of-mouth from existing visitors) this ability must be perceived as such by these target tourists. A first question then arises: who is the target tourist for Brussels?

The joint answer of the interviewed Brussels tourism stakeholders is city tripper, with 5 (out of 6) of them mentioning the term city trip or a synonym when talking about Brussels during the interview, even though the question "Who is the target tourist for Brussels?" was never directly asked.

Brussels is a destination for...	
<i>Stakeholder</i>	<i>Term used</i>
Patrick Bontinck (visit.brussels)	City break
Thierry Wauters (urban.brussels)	"Minitrip" (= Belgicism to express a short trip)
Wim Nicolaï (Brussels Booking Desk)	City trip
Frédéric Meseeuw (BOZAR)	City trip
Séverine Provost (Be Culture)	City trip

All these terms share the same meaning, that is to say « a short holiday spent in a city » (Collins English Dictionary, 2022). There are various reasons to explain why Brussels is not suited to becoming a long-stay destination. On one side is the lack of real demand, as Patrick Bontinck (visit.brussels) points out, due in part to the Belgian weather, whereas many tourists are seeking sun for their main holiday. This lack of demand is also attributable to the fact that tourism in Brussels is city tourism, as Wim Nicolai (Brussels Booking Desk) explains. Like the vast majority of large cities, the length of stay in Brussels is therefore short since tourists are looking for destinations that are less urban for their longer stays, which will allow them to relax. On the other, Wim Nicolai notes the absence of a real long-stay offer, too. For instance, spending a week in Brussels with a group of 10 people means having to book two or three different hotel rooms, in the absence of other alternatives.

City trippers are thus characterised by a short length of stay, usually 2 or 3 days. But what are the needs of this category of tourists? In other words, what do they look for in a destination? What makes a destination attractive for a city break according to them? These are the questions that three Irish researchers (Dunne et al., 2011) attempted to answer by interviewing 1 000 visitors to Dublin to examine the main factors that attract tourists to a destination for a city break. They also compared these factors with those that attract the same tourists when they are looking for a destination for their main and longer holidays (if any).

<b>Table IV</b> Pull factors – city break and main vacation			
<i>City Break</i>	<i>Percent</i>	<i>Main Vacation</i>	<i>Percent</i>
Convenience/ease of access	35	Sun, sand, sea	38
Cost of travel	33	Positive/fun image	20
Fun destination image	23	Quality of facilities	15
Pre arranged event	23	Cost of trip	10
Friendly image	13	Previous visit	10
Previous visit	10	VFR	8
Tourist sites	5		

Pre-arranged event = a given event that brings tourists to a destination they would not have visited otherwise

VFR = Visiting Friends and Relatives

*Figure 15: Pull factors for a city break vs. pull factors for main holidays (International Journal of Culture, Tourism and Hospitality Research, 2011)*

As can be seen, major differences exist between the pull factors for a city break and the pull factors for a main holiday. On the one hand, the decision-making process for the main holiday follows a rather standard pattern that is similar to the theoretical model :

1. Sun, sand and sea = natural attractions

2. Positive and/or fun image = derived from attractions (social, cultural, events or food and drinks) and enhanced by communication or previous visit
3. Quality of facilities = supporting facilities (accommodation, transport, energy, cleanliness, etc.)
4. Situational factors = financial accessibility of the destination or presence of friends and family

On the other hand, this theoretical model does not seem to apply to city breaks where situational factors play a major role in the decision-making process, more than image and event attractions, and much more than cultural or historical attractions as such. More specifically, the situational factors involved here are the time and cost required to reach the destination. This means factors over which destinations have little or no control...

This is in line with the findings of The Art cities research (Toerisme Vlaanderen, 2018), in which 29% of the tourists interviewed stated that accessibility from their home city or country played an important role in their decision to come to Brussels, and 16% of them made the same statement about the price of transport to get there (cf. 3.1.B).

The most important element is thus ease of access, which can easily be explained by the short length of stay. City trippers do not want to spend too much time travelling to and from the destination, given that they will only be there for a few days. The second main element is the cost of travel. Not surprising considering that the boom in city breaks is largely attributable to the arrival of budget carriers such as Ryanair in the tourist air transport market. Some tourists take several city breaks during the year, others see it as an opportunity to take short holidays that they could not afford before. In both cases, they expect a cheap price. It must be emphasised that only the cost of transport is concerned here, and not the cost of the destination itself, such as accommodation for example.

Let us start by analysing how well Brussels is doing in these two dimensions.

#### A. Ease of access and cost of travel to Brussels

The accessibility of Brussels and its ideal location have also been frequently mentioned by Brussels tourism stakeholders. Thierry Wauters (urban.brussels) talks about an opportunity tourism benefiting Brussels, with short distances between Paris and the Belgian capital for example. Wim Nicolai (Brussels Booking Desk) does not disagree, comparing Brussels to a transfer destination between Paris, Amsterdam, Bruges or

Antwerp. Frédéric Messeeuw (BOZAR) concurs, observing that Brussels is at the crossroads of major European tourist hubs such as Paris, Amsterdam, London, and even Berlin a little further away. Séverine Provost (Be Culture) also observes that when a tourist spends two days in Brussels, it is not uncommon for them to spend another two days in Bruges, and then perhaps in Ghent, before leaving for the Netherlands or France.

For many of them, this relegates Brussels to being a mere transit destination, which could explain the low average length of stay. However, in opposition to this general sentiment among experts, exclusive travel to Brussels would still represent two thirds of total tourism according to The Art cities research (Toerisme Vlaanderen, 2018). For the remaining 33%, they come from or go to other destinations, mainly Belgian: Bruges at 21%, Ghent at 10% and Antwerp at 7% (cf. 3.1.B), before presumably visiting other neighbouring countries for some of them. Only 6% reportedly come from or go directly to a European destination outside Belgium.

According to the *Leisure tourists* report (visit.brussels, 2018), the three most common means of transport used to come to Brussels by overnight tourists are train (40%), car (38%) and plane (30%). The total percentage of over 100% can be explained by the possibility of combining these various means of transport. In a continent like Europe where the highway network is largely developed, looking at a map is sufficient to judge the accessibility of a destination by car or by bus for the inhabitants of foreign countries and cities. Similarly, the cost of travel will be closely related to the number of kilometres between the destination and the point of origin. By contrast, trains and planes require a more in-depth analysis.

#### a. By train

Peter Kerpedjiev, a Senior Software Engineer, used the Swiss public transport API to develop a map that shows the travel time by train from any point in Europe to a given city. Let us take Brussels and compare it with other Western European cities.

The following legend has been applied to the map :



The parts of Europe that can reach the destination most rapidly are coloured dark, and the parts of Europe for which it takes the longest are coloured light.

*The size of the map has been reduced to allow side-by-side comparisons, but it remains large enough to get an overview. For more detail, please feel free to zoom in.*



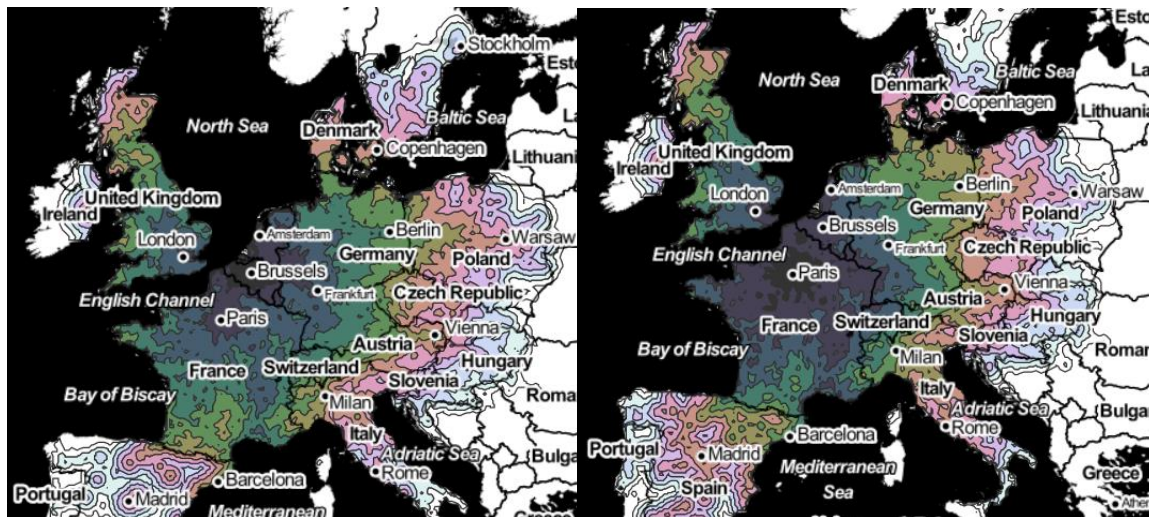


Figure 16: Duration of a train journey from any point in Europe: to Brussels vs. to Paris (Kerpedjiev, 2015)

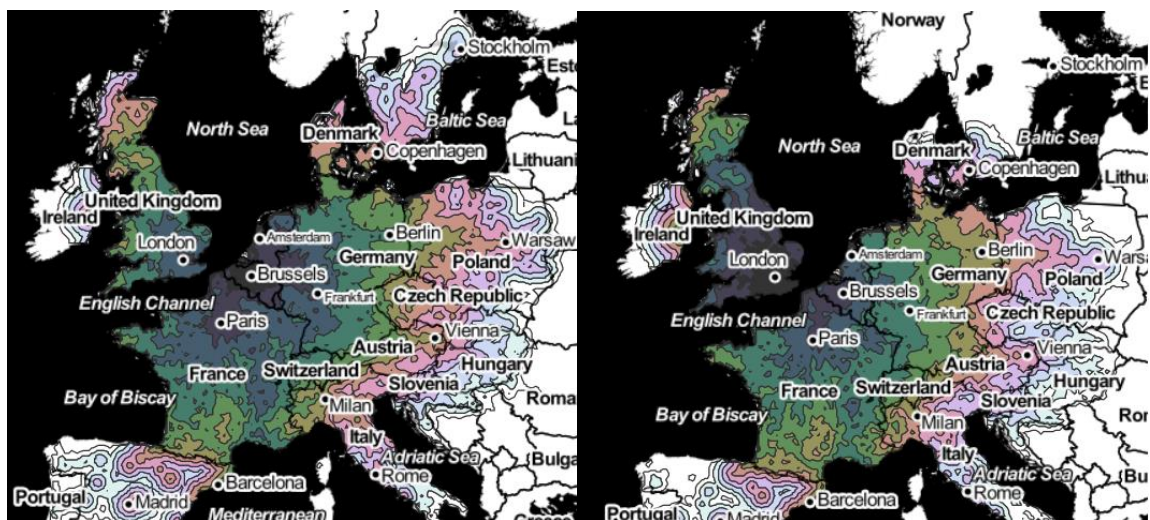


Figure 17: Duration of a train journey from any point in Europe: to Brussels vs. to London (Kerpedjiev, 2015)

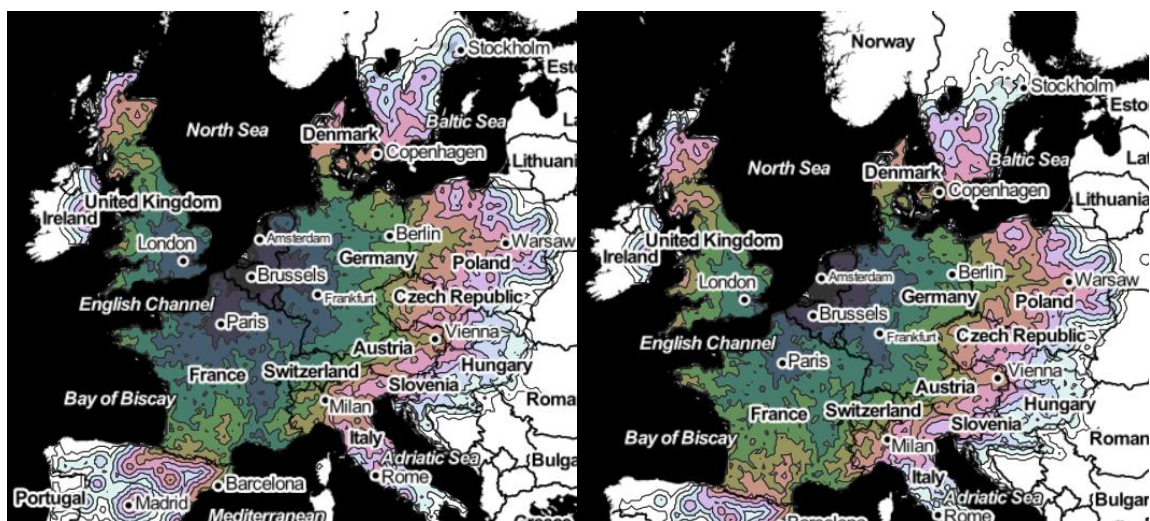


Figure 18: Duration of a train journey from any point in Europe: to Brussels vs. to Amsterdam (Kerpedjiev, 2015)



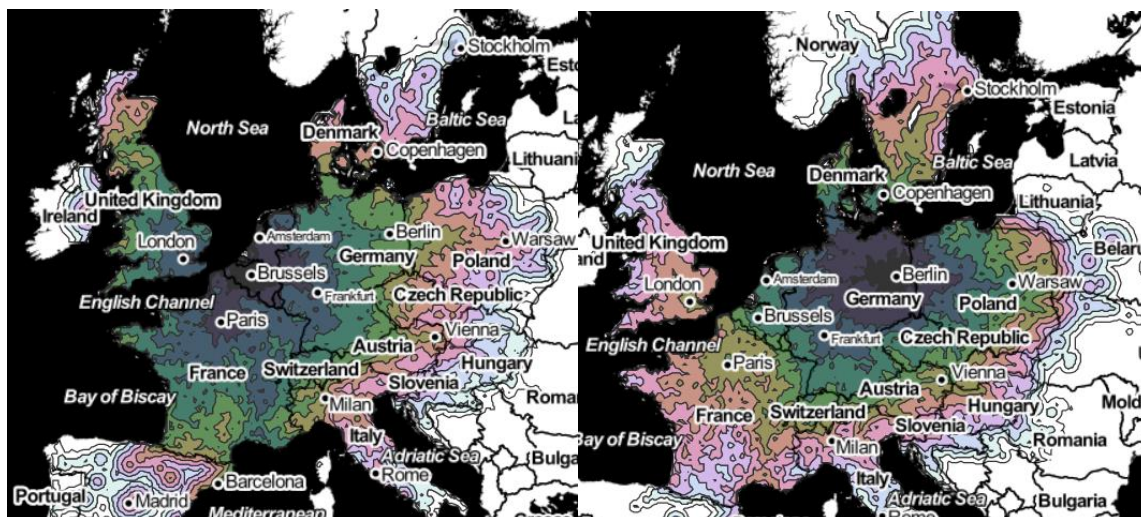


Figure 19: Duration of a train journey from any point in Europe: to Brussels vs. to Berlin (Kerpedjiev, 2015)

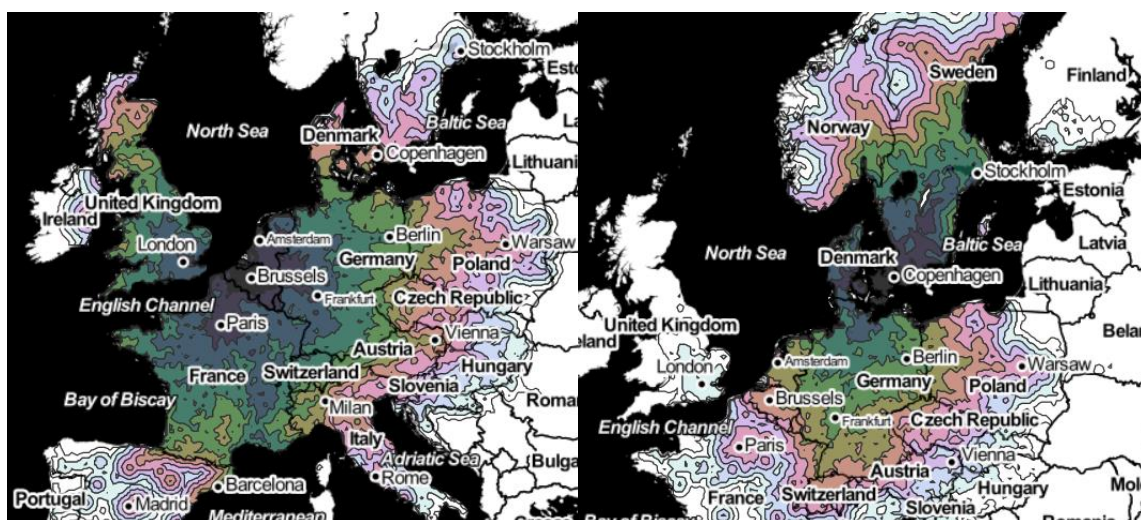


Figure 20: Duration of a train journey from any point in Europe: to Brussels vs. to Copenhagen (Kerpedjiev, 2015)

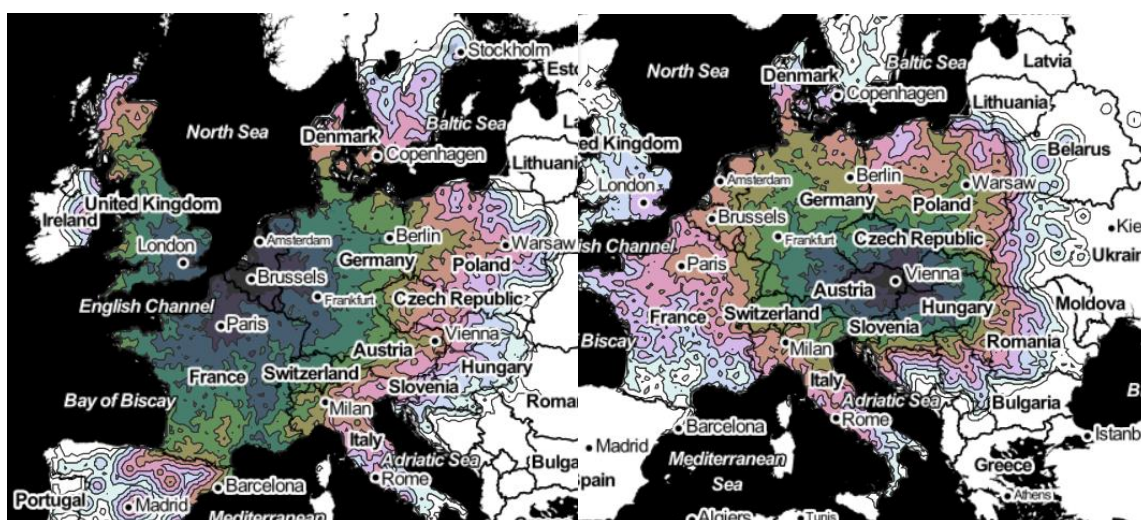


Figure 21: Duration of a train journey from any point in Europe: to Brussels vs. to Vienna (Kerpedjiev, 2015)



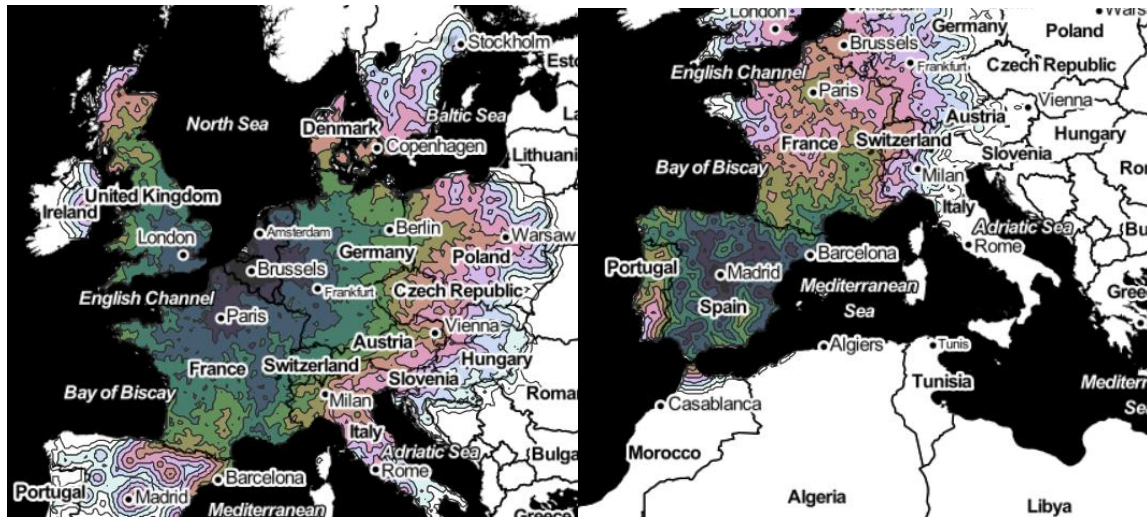


Figure 22: Duration of a train journey from any point in Europe: to Brussels vs. to Madrid (Kerpedjiev, 2015)

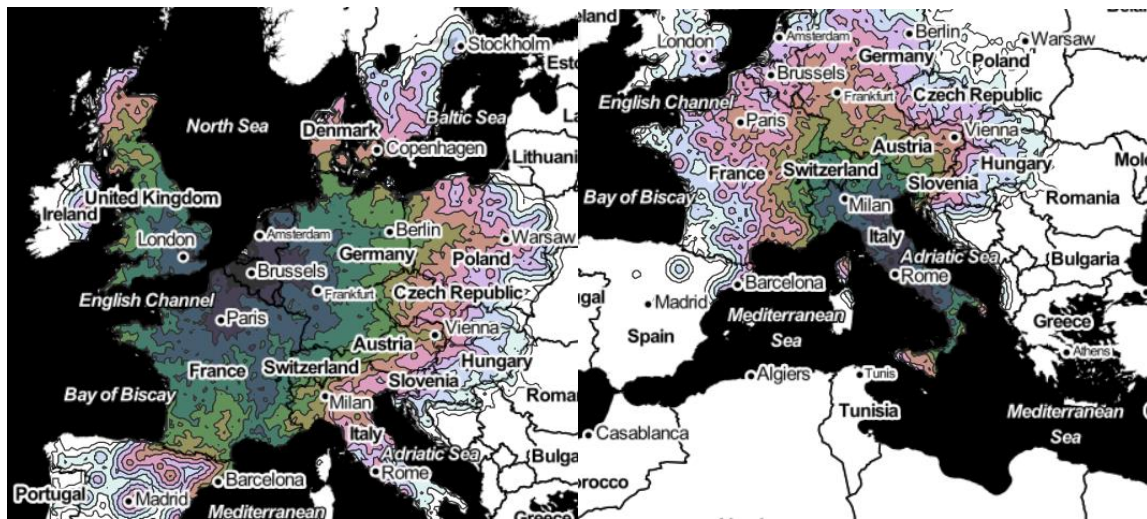


Figure 23: Duration of a train journey from any point in Europe: to Brussels vs. to Rome (Kerpedjiev, 2015)

The first observation that can be made from this map is that Brussels is one of the most accessible cities by train in Western Europe : it can be reached in less than 4 hours from Paris, London, Amsterdam or Frankfurt and in less than 8 hours from Berlin. Paris is also one of these : it takes less than 4 hours to get there from Brussels or London, and although it takes between 4 and 6 hours from Amsterdam or Frankfurt and between 8 and 10 hours from Berlin, it can be reached in about 8 hours from Milan or Barcelona.

London and Amsterdam are accessible too, although to a lesser extent. It takes less than 4 hours to reach the English capital from Brussels or Paris, between 4 and 6 hours from Amsterdam and less than 8 hours from Frankfurt. In the other direction, between 4 and 6 hours are also needed to reach Amsterdam from London, as well as from Paris or Frankfurt, while it takes less than 4 hours from Brussels and less than 8 hours from Berlin.

Berlin's position at the centre of Europe, closer to the countries of Eastern Europe, makes it less accessible to the Western European countries. It takes between 6 and 8 hours to get there from Brussels or Amsterdam and between 8 and 10 hours from Paris. In contrast, this makes Berlin more accessible to cities such as Copenhagen or Warsaw from where it can be reached in less than 8 hours.

Copenhagen, which can thus be reached from Berlin in less than 8 hours, is hardly accessible from other Western European countries. It can only be reached in less than 12 hours from the Netherlands, and therefore from Amsterdam. Vienna, meanwhile, can be reached in less than 12 hours from Brussels, Amsterdam, Berlin or Milan and in less than 10 hours from Frankfurt or Warsaw.

Lastly, Madrid is probably the least accessible of all these cities : only Paris and parts of France can get there in less than 12 hours. From other countries, it takes more than half a day to reach it. Rome is barely more accessible : only Switzerland, part of Austria and small parts of Germany and France can reach it in less than 12 hours.

Now that the ease of access by train to these various destinations has been analysed, the cost of travelling by train to them needs to be considered, even though it is likely to be closely related to the duration of the journey. In this regard, the map developed by Rick Steves, founder of a namesake travel company that brings more than 30 000 visitors to Europe each year, is of particular interest.

For a better understanding of this map, it should be noted that the lines represent the main direct train lines in Europe. The numbers attached to them correspond to the full price in US dollars for a one-way trip in second class on that route for the first one, and to the travel time for the second one. This map can therefore also be used as a complement to the one discussed above.

A table below the map shows the total price of travelling by train between each of the following destinations: Brussels, Paris, London, Amsterdam, Berlin, Copenhagen, Vienna, Madrid and Rome. In each case, the cheapest journey has been taken, whether or not this is the shortest or most direct one. As prices were initially converted assuming an exchange rate of 1€ = 1.15\$, the same exchange rate has been used to convert them back into euros in the table.



Figure 24: Train cost and time estimates across Europe (Steves, 2022)

	BRU	PAR	LON	AMS	BER	COP	VIE	MAD	ROM
BRU	/	100 €	122 €	78 €	204 €	261 €	326 €	326 €	287 €
PAR	100 €	/	122 €	152 €	209 €	261 €	243 €	226 €	187 €
LON	122 €	122 €	/	200 €	326 €	383 €	365 €	348 €	309 €
AMS	78 €	152 €	200 €	/	126 €	187 €	261 €	378 €	339 €
BER	204 €	209 €	326 €	126 €	/	165 €	135 €	435 €	326 €

	BRU	PAR	LON	AMS	BER	COP	VIE	MAD	ROM
COP	261 €	261 €	383 €	187 €	165 €	/	300 €	487 €	448 €
VIE	326 €	243 €	365 €	261 €	135 €	300 €	/	461 €	191 €
MAD	326 €	226 €	348 €	378 €	435 €	487 €	461 €	/	330 €
ROM	287 €	187 €	309 €	339 €	326 €	448 €	191 €	330 €	/

BRU = Brussels / PAR = Paris / LON = London / AMS = Amsterdam / BER = Berlin / COP = Copenhagen / VIE = Vienna / MAD = Madrid / ROM = Rome

Figure 25: Train cost estimates between Western European destinations

To get a clearer picture before moving on to the analysis, let us calculate the average cost to reach each destination by train from all the other Western European destinations.

BRU	PAR	LON	AMS	BER	COP	VIE	MAD	ROM
213 €	188 €	272 €	215 €	241 €	311 €	285 €	374 €	302 €

Figure 26: Average train cost estimates between Western European destinations

At first glance, this seems to confirm the conclusions drawn from Kerpedjiev's map : Brussels, Paris and Amsterdam are among the most accessible large cities by train, in terms of both time and cost, whereas Copenhagen, Madrid and Rome are among the least accessible ones. However, some nuances should be mentioned :

- Paris and Brussels appear to be equally accessible in terms of time, yet there is a significant difference in terms of cost. This is explained by the fact that access to the French capital is significantly cheaper (around 100€) than to the Belgian capital from Vienna, Madrid and Rome.
- Amsterdam seems less accessible than Brussels in terms of time, but not in terms of cost. While access to Brussels is cheaper than Amsterdam from Paris, London, Madrid and Rome, Amsterdam is on a par with Brussels thanks to cheaper access from Berlin, Copenhagen and Vienna.
- London, despite being relatively accessible in terms of time, is less accessible in terms of cost. To reach it from the selected Western European capitals, it will cost more for each of them than to reach Brussels.



- Berlin, by contrast, is more accessible in terms of cost than in terms of time. It can be accessed from Brussels, Paris, Amsterdam, Copenhagen and Vienna for around or less than 200€.

In addition to the international accessibility of Brussels compared to other destinations, the accessibility of Brussels at a national level should also be considered.

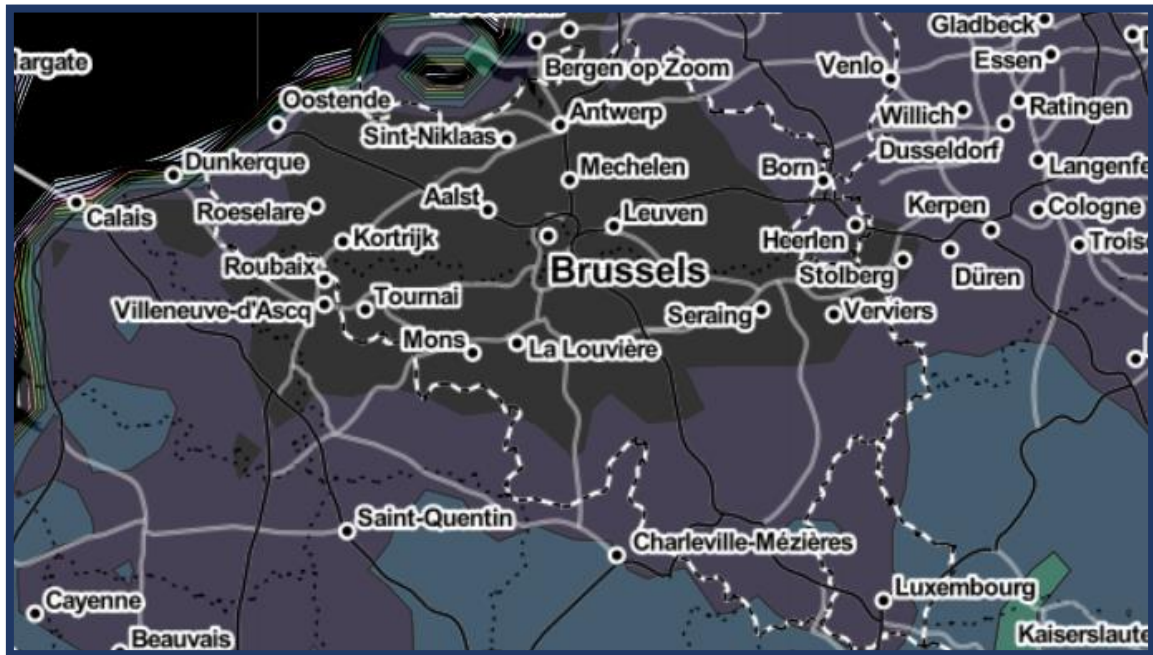


Figure 27: Duration of a train journey from any point in Belgium to Brussels (Kerpedjiev, 2015)

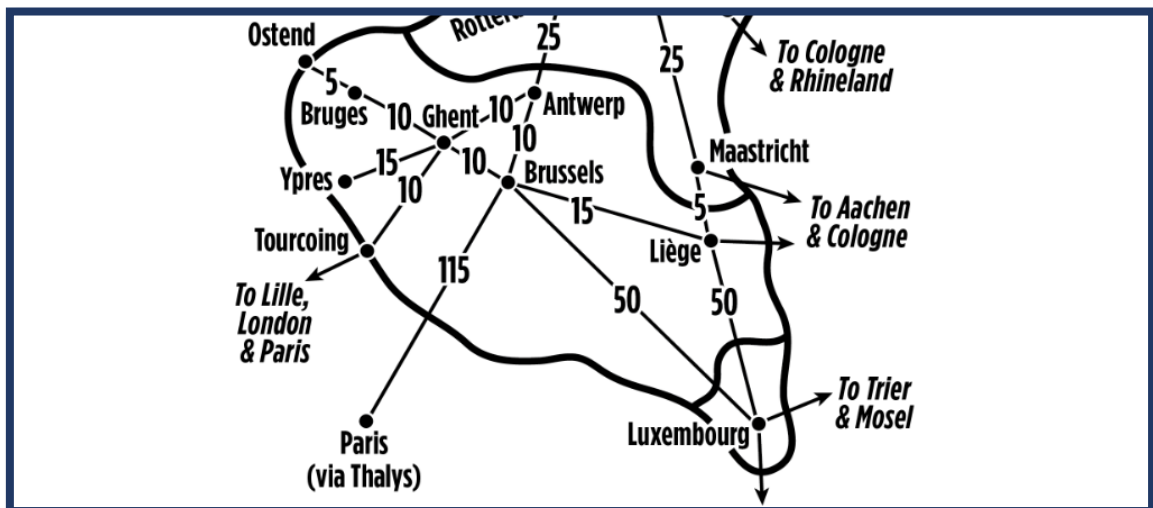


Figure 28: Train cost and time estimates across Belgium (Steves, 2022)

It can be concluded that the majority of Belgians can reach Brussels in less than 2 hours by train, including those living in the main cities such as Antwerp, Ghent, Mons or Liège. Only those living in the southern part of the country have to travel between 2 and 4

hours to reach the capital. As far as costs are concerned, Brussels can be accessed from most of Belgium and major cities for 15€ or less.

In summary, besides being easily accessible by train for most Western European countries, Brussels is also easily accessible for domestic tourists. However, as Belgium is a small country where all cities are inherently accessible for nationals, it is safe to assume that ease of access and cost of travel are not as important factors in the decision-making process for a city break for local tourists as they are for international tourists. And that therefore, image becomes the most important factor.

#### *b. By plane*

For the analysis of the accessibility of Brussels by plane compared to other Western European destinations, the "Escape" tool developed by researchers from the MIT Senseable City Lab has been used (Shah et al., 2022). This tool displays the cheapest flights to a given destination on defined dates. The dates chosen for this analysis are from July 15 (outbound flight) to July 17 (return flight), that is to say a 2-day city trip with 2 nights on site. The destinations observed are the same as those chosen for the analysis of accessibility by train : Brussels, Paris, London, Amsterdam, Berlin, Copenhagen, Vienna, Madrid and Rome.

The price displayed corresponds to the price of both tickets, outward and return, at the time of the analysis (i.e. May 6) and may include several flights if a connection is necessary or if it represents a cheaper alternative than a direct flight. In the table below, prices have been grouped into 6 categories: under 50€, between 50€ and 99€, between 100€ and 149€, between 150€ and 199€, between 200€ and 250€ and over 250€. For each of these categories, the number shown represents the number of cities that can reach that destination for a price that falls within the range. This number is then subdivided to distinguish European cities from North American cities and from cities in the rest of the world (South America, Africa, Asia and Oceania).

	< 50 €	50 - 99 €	100 - 149 €	150 - 199 €	200 - 250 €	> 250 €
<b>BRU</b>	1	12	45	58	60	1 722
<i>Europe</i>	1	12	45	53	59	202
<i>North America</i>	0	0	0	0	0	588
<i>Rest of the world</i>	0	0	0	5	1	932



	< 50 €	50 - 99 €	100 - 149 €	150 - 199 €	200 - 250 €	> 250 €
PAR	0	4	15	51	85	1 742
<i>Europe</i>	0	4	15	51	82	219
<i>North America</i>	0	0	0	0	0	602
<i>Rest of the world</i>	0	0	0	0	3	921
LON	0	27	62	61	66	1 695
<i>Europe</i>	0	27	61	57	60	166
<i>North America</i>	0	0	0	0	0	595
<i>Rest of the world</i>	0	0	1	4	6	934
AMS	0	2	11	28	67	1 751
<i>Europe</i>	0	2	11	28	66	263
<i>North America</i>	0	0	0	0	0	583
<i>Rest of the world</i>	0	0	0	0	1	905
BER	0	3	31	49	62	1 728
<i>Europe</i>	0	3	31	49	58	231
<i>North America</i>	0	0	0	0	0	592
<i>Rest of the world</i>	0	0	0	0	4	905
COP	1	6	16	23	45	1 691
<i>Europe</i>	1	6	16	23	45	274
<i>North America</i>	0	0	0	0	0	561
<i>Rest of the world</i>	0	0	0	0	0	856

	< 50 €	50 - 99 €	100 - 149 €	150 - 199 €	200 - 250 €	> 250 €
<b>VIE</b>	0	1	31	47	65	1 762
<i>Europe</i>	0	1	31	46	59	233
<i>North America</i>	0	0	0	0	0	591
<i>Rest of the world</i>	0	0	0	1	6	938
<b>MAD</b>	0	10	29	52	75	1 549
<i>Europe</i>	0	7	27	51	72	201
<i>North America</i>	0	0	0	0	0	524
<i>Rest of the world</i>	0	3	2	1	3	824
<b>ROM</b>	4	11	50	73	45	1 737
<i>Europe</i>	4	11	50	70	40	196
<i>North America</i>	0	0	0	0	0	601
<i>Rest of the world</i>	0	0	0	3	5	940

Figure 29: Round trip flight costs to Western European destinations

The first observation that can be made is that for a weekend from July 15 to July 17 in one of the selected European destinations, almost all round-trip flights for less than 250€ leave from another European city. This is of course logical as the other continents have more distance to cover and flights are consequently more expensive. But more importantly, this is also because when North Americans or Asians come to Europe, they do not come just for 2 or 3 days. They do what is called a multi-city break : they land in a European city, spend a few days there and then head off to other destinations in Europe, usually by train or bus. Frédéric Meseeuw (BOZAR) has experienced this first hand when hosting tourists in an Airbnb. Due to its ideal location between major tourist hubs and its accessibility by train, Brussels was quite often part of the package, but was only a one-day destination for these tourists, coming from Amsterdam and going to Paris, or vice versa. This observation is particularly true for Chinese visitors, who stay

on average 1.67 days (cf. 3.1.C), whereas Japanese (1.98 days) and American (2.14 days) tourists seem to stay a little longer in Brussels before moving on to another destination.

As with the costs of travelling by train, a summary table is provided below for ease of analysis. The total number of cities that can reach and return from the destination by plane for less than 100€, less than 150€, less than 200€ and less than 250€ has been calculated for the 9 destinations observed. In contrast to the previous table, the values add up from category to category. In concrete terms, this means that the cities in the category less than 100€ are also included in the categories less than 150€, less than 200€ and less than 250€.

	Less than 100 €	Less than 150 €	Less than 200 €	Less than 250 €
BRU	13	58	116	176
PAR	4	19	70	155
LON	27	89	150	216
AMS	2	13	41	108
BER	3	34	83	145
COP	7	23	46	91
VIE	1	32	79	144
MAD	10	39	91	166
ROM	15	65	138	183

Figure 30: Distribution of round-trip flight costs to Western European destinations

In terms of cost, London is the most accessible major city in Western Europe by plane. Brussels, although a little less affordable, is still among the most accessible cities, at a level comparable to Madrid and Rome. At the opposite end of the scale, Copenhagen is the least accessible destination, followed by Amsterdam, which does not appear to be as accessible by air as it is by rail. Paris is about average, making Brussels the only destination among those studied to be both one of the most accessible by train and one of the most accessible by plane, whether in terms of time or cost.

Brussels seems therefore to hold a competitive advantage on the two main factors in the decision-making process for a city break (ease of access and cost of travel). Nevertheless,

these are factors that are not within the DMO's control, and this comparative advantage could be undermined by changes in the transport market and in particular by future technologies that may transform it. It is then necessary to have a competitive advantage on an element that can be controlled to a certain extent, such as the image of the destination.

## B. Image of Brussels

Talking about the image of Brussels in an objective way is not an easy task. If the accessibility of the city and its ideal location were commonly accepted by the experts, it could in any case be proven by facts. When talking about image, however, the perceived value of a destination is at stake, and perception implies subjectivity, whether voluntary or not. This applies to the experts interviewed, but also to the tourists. That is why it is not possible, when talking about image, to include the perception that all tourists, whether national or international, have of Brussels. The aim of this section is rather to identify one or more common denominators in the image of Brussels held by the majority of tourists.

### *a. At a national level*

The first observation, made by Patrick Bontinck ([visit.brussels](http://visit.brussels)) and shared among others by Séverine Provost (Be Culture) and Thierry Wauters ([urban.brussels](http://urban.brussels)) : Brussels has a poorer image at the national level than at the international level. In their opinion, this can be explained by internal competition between the different regions of Belgium. Flanders and Wallonia would deliberately not give Brussels a good image, particularly through political statements and the press in which the capital is often portrayed as congested, dangerous or dirty. While none of the tourism stakeholders claim that these problems do not exist, they feel that they may not be as omnipresent as conveyed by the media.

Wim Nicolai (Brussels Booking Desk) agrees and argues that the DMO has a key role to play in changing this perception of Brussels in the media and in spreading the opposite message. This is something that it is currently failing to do, since 40% of Belgians say they have never been attracted to Brussels (cf. 3.1.A). This poor image of Brussels among national visitors is reflected in the tourist figures, as domestic tourists only represent 22% of total overnight stays in the Belgian capital (cf. 3.1.C). As a comparison, Germans account for 55% of total overnight stays in Berlin. Although the German domestic market is by no means comparable to the Belgian domestic market (83 million vs. 11 million), the same observation can be made when comparing this 22% with Ghent, where domestic tourists represent 32% of total overnight stays. This is one of the factors that

may explain why Brussels suffered more than some other Belgian cities from the covid-19 crisis, and particularly from when the borders were closed, with domestic tourism becoming the sole source of income for the destinations.

If the intra-national competition is so fierce on the leisure tourism market, it could also be partly due to the fact that there is no organisation in charge of promoting the destination Belgium, as Wim Nicolaï points out. It seems to be an exception in Western Europe : France has Atout France, Germany has the German National Tourism Board, the Netherlands has the Netherlands Board of Tourism & Conventions, the UK has VisitBritain, Spain has Turespaña, Italy has ENIT, Denmark has VisitDenmark and Austria has The Austrian National Tourist Office. The presence of such an organisation has the advantage of increasing collaboration between the different regions and eventually coordinating their actions. Above all, it allows the regions to share a common goal of increasing the attractiveness of the global destination, and to put into practice the concept of cooptition (cf. 1.1.B), i.e. the coexistence of cooperation and competition. The idea is that regions should not be satisfied with aiming only at competitiveness at an individual level but should aim at increasing the attractiveness of Belgium as a whole, from which they could all benefit.

Being part of a country with an attractive image at an international level is probably one of the best ways for Brussels to increase its perceived value among tourists, but also one of the most unrealistic, given the complexity of Belgium. Thierry Wauters believes that there are no more tourist and intellectual links between Brussels and Ostend, for example, than between Brussels and Paris or Brussels and Amsterdam. A lack of intellectual and cultural proximity therefore appears to exist between Belgian cities, with Flanders being closer to Dutch culture and Wallonia being closer to French culture, on top of a complex political structure in Belgium (which will not be further developed in this thesis) that makes the creation of a national tourism board highly unlikely.

This culture clash between the French and Dutch cultures can in fact be felt in Brussels alone, according to Wim Nicolaï, contributing to a lack of clarity for some people as to what Brussels is. Another related hypothesis put forward by Thierry Wauters is the multicultural aspect of Brussels, a richness that is strongly promoted by the city but that could be a source of discomfort for some Belgians. Patrick Bontinck acknowledges that this diversity and spirit of tolerance with regard to religion and sexual orientation may frighten some Walloons and Flemings.

Other possible explanations, more specific to the inhabitants of the north of the country, put forward by Ludovic Goethals (Ambitious Brussels), are that mobility in Brussels is not adapted to the habits of Flemish tourists and that Dutch is not always mastered in

shops, hospitality and catering establishments, thus making it a rather unwelcoming destination for a whole part of the country. Likewise, Wim Nicolai considers that the Dutch-speaking culture, although present in Brussels, is very little known. He cites the small number of Dutch-speaking theatres in the capital as proof of this. The cultural offer is indeed closely linked to the language culture, something that is not a problem in countries where the entire territory speaks the same language, but it is in Belgium. Although museums are less subject to this issue, there is often a choice to be made in terms of artistic programming. Knowing that developing a show, for example, in both languages and communicating it afterwards naturally generates additional costs. Part of the cultural offer therefore chooses to present itself only to a part of the population, thereby excluding the other part.

To sum up, a number of reasons have been given to explain the lack of pride Belgians have for their capital city:

- The problems of traffic jams, insecurity and uncleanliness amplified by politicians and the media in a climate of competition between regions combined with the inability of the DMO to counter this bad press.
- Competition between regions which is intensified by the absence of an organisation in charge of promoting Belgium as a whole (as is the case for all other Western European countries), which would bring Wallonia, Flanders and Brussels together around a same table and a common objective.
- The issue of language in the cultural offer, which means that Brussels has to make twice as much effort as other European capitals to be able to reach visitors from the whole country.
- Beyond language, the fact that there are differences between Walloon and Flemish (one being closer to French culture, the other to Dutch culture), and that Brussels is a melting pot of the two that ultimately suits neither.
- In addition to this clash of cultures between French and Dutch culture, other cultures make up the richness of Brussels and its multiculturalism, but do not help Belgians to identify with their capital, since they are not used to so much diversity.

Without being able to determine the importance of these factors with certainty, it is likely that each of them contributes to a greater or lesser extent to the image deficit of Brussels at a national level. It should be remembered that this is particularly problematic since the image of a destination plays an even more important role in the decision-making process for a city break for domestic tourists than for international tourists, due to the

lower importance they place on ease of access and cost of travel, which vary little from one Belgian city to another (cf. 4.1.A).

*b. At an international level*

The rather poor image that Belgians have of Brussels discussed in the previous section leads to an underlying problem : the lack of local ambassadors. Patrick Bontinck (visit.brussels) is convinced that this represents the strategic priority for the promotion of the destination: « if 10 million Belgians are convinced that Brussels is the right place to go, then 10 million people will advertise it ». Wim Nicolai (Brussels Booking Desk) shares this view by emphasising the importance of ensuring that tourists, not only domestic ones, become in one way or another ambassadors of what they have seen.

Strategic objective 1 of the visit.brussels action plan is precisely to strengthen city marketing through local ambassadors (cf. 3.2.C). This means making Brussels more pleasant for its inhabitants. The benefit to be derived from a tourist point of view is twofold : the inhabitants will be more likely to promote the city on their own, and the city will also be more pleasant for tourists, improving their experience and making them more willing to share positive messages about it. In concrete terms, the objective is to make Brussels an attractive place to live and a green city with soft mobility and easy access to culture. This requires not only communication campaigns, but also territorial, mobility and urban planning policies, elements which are outside the scope of this thesis.

While the experts shared the view that the image of Brussels at a national level is deficient, their opinions differ as to the image of Brussels at an international level. Patrick Bontinck believes that Brussels is known and recognised as the capital of Europe, but also for its diversity and multicultural aspect, which may not be especially attractive to national tourists, but which are appreciated and known by international tourists, even if not yet sufficiently so according to him.

Thierry Wauters (urban.brussels) goes further and states that the international image of Brussels is not yet very clear, due to a lack of city marketing. And that what Brussels is best known for, namely the international European aspect, is not the city's greatest asset, considering that European buildings are not part of Brussels' major heritage.

Ludovic Goethals (Ambitious Brussels) supports this view and believes that Brussels has a much greater potential to be promoted abroad. In fact, the Ambitious Brussels group was born out of this observation, shared by the major hotel groups present in Brussels (Everland, NH Hotel, Thon Hotel, Accor and Radisson). While they agree that the European institutions are recognised at European level, they feel that Brussels has no

identity of its own beyond that. Wim Nicolai joins them in arguing that Europe is the only thing that distinguishes Brussels. The multicultural aspect of Brussels would also be a proof of this lack of identity : wanting to identify Brussels as a multicultural city makes it difficult for an international tourist to define precisely what Brussels is. Séverine Provost (Be Culture) acknowledges that Brussels is not an easy city to understand for internationals, and that identifying it as the capital of Europe is an easy solution for them. Conversely, according to Pascal Smet (Secretary of State for the Brussels-Capital Region, responsible for Heritage and European and International Relations), this multicultural and cosmopolitan aspect is the greatest selling point of Brussels, since the fact that there is no dominant culture means that everyone can feel at home, or at least not feel like a complete stranger in the city (Musch, 2019).

A common thread can be found in these divergent opinions : the current importance of the presence of the European institutions for Brussels, along with the image of a diverse city that is open to the world that it implies. Visit.brussels wants to exploit this opportunity to the greatest extent possible, as shown by strategic objective 4 of its action plan (cf. 3.2.C). As a reminder, it plans to make the European district the USP (Unique Selling Proposition) of Brussels. But would that make sense for city trippers ?

To provide an answer, let us return to the study carried out by Dunne et al. (2011). In addition to what tourists look for in a city break destination, they also looked at the deeper needs they pursue through a city break. Once again, these needs are compared with those pursued through their main and longer holidays (if any).

<b>Table III</b> Push factors – city break and main vacation			
<i>City break</i>	<i>Percent</i>	<i>Main vacation</i>	<i>Percent</i>
Escape	38	Relax	35
Socialize (internal)	33	Social	25
Self esteem (gift giving)	15	Escape	20
Fun/excitement	13	Fun/excitement	10
Socialize (external)	10	Prestige	8
Relax	10	Education	8

Socialize (internal) = socialize with people who travel with them (family or friends)

Socialize (external) = socialize with new people

*Figure 31: Push factors for a city break vs. pull factors for main holidays (International Journal of Culture, Tourism and Hospitality Research, 2011)*

As a reminder, 23% of the tourists surveyed are looking for a destination with a fun image for their city break, and 13% for a destination with a positive image (cf. 4.1.). It can therefore be concluded from this second table that for a city break, tourists are



looking for a destination with a fun and/or positive image that is perceived as allowing them to escape their daily lives and spend time with their relatives.

It should also be noticed that contrary to their needs for their main holiday, tourists are less likely to be interested in relaxing during their city break. The latter is therefore mainly seen as a « doing and experiencing trip » compared to the main holiday which is more about « recharging the batteries » (Dunne et al., 2011). This may seem contradictory to the primary purpose of the city break, that of escape, but it is in fact more of an escape to do recreational or fun activities than an escape to do nothing.

The question now is whether focusing the image of Brussels on the European institutions meets the needs of the leisure tourists who wish to take a city break. For the 25% of tourists planning a city break for whom the fun image of the destination is a major decision factor according to Dunne et al (2011), it probably does not. According to Pascal Smet, Brussels is perceived as « the city of boring politics », far from the « trendy and young » image of a city like Amsterdam, for example (Musch, 2019). For the 38% who want to escape from their daily lives, the fact that Brussels is strongly linked to the European institutions is probably not the most attractive image to them either. Escape from everyday life rarely rhymes with visiting the workplace of thousands of people, which furthermore is a place where politics are being discussed. As for the 33% who want to socialise with their friends and family by living experiences, there is also room for improvement, as Pascal Smet himself admits, who wants to turn Brussels from « a city of bureaucrats into a city of experiences » (Musch, 2019).

Nevertheless, according to the visit.brussels survey (2021), only 20% of international tourists say that they have never been attracted to Brussels (cf. 3.1.A). It should be observed, however, that only German, Dutch and French tourists were interviewed, which means that this survey is not fully representative of the overall international opinion. Yet it would seem that Brussels is better perceived internationally than nationally, since it is a must-see city for a large proportion of Europeans, either because of its accessibility or because of its status as the capital of Europe. But this very limited perception means that tourists who come to Brussels often limit themselves to the European institutions and the other most famous places and monuments of the capital : the Grand-Place, the Atomium and the Manneken-Pis. All these elements are included in the two main reasons, apart from the accessibility of the city (29%), why a tourist comes to Brussels according to The Art cities research (Toerisme Vlaanderen, 2018) : heritage (including European heritage) at 35% and reputation at 24% (cf. 3.1.B). Reputation includes the image of Brussels as a "world city with cultural diversity & immigration" and as the "European capital", which are among the words most often used to describe it (cf. 3.1.B).

The attractiveness of Brussels can therefore be summed up in 3 concepts : accessibility, Europe & diversity and heritage. As already mentioned, the accessibility of the city is an element over which the DMO has little or no control. The European capital and diversity dimension, for its part, is already extensively promoted by the DMO (and will continue to be in the future) and seems to be widely recognised by tourists. It is therefore on the cultural heritage front that new solutions can be found, as there are several challenges attached to it.

#### 4.2. How to improve the attractiveness and value of Brussels as a tourist destination through cultural heritage ?

The first challenge is to improve the promotion of heritage other than the European institutions, the Grand Place, the Atomium and the Manneken-Pis. Ludovic Goethals (Ambitious Brussels) proves the need for this by quoting expatriates in Brussels who say that they have only discovered some of the city's heritage gems after a few months, and that these gems are likely to remain unknown to tourists who only stay a few days. According to him, even if these tourists visit other places and monuments during their trip than those mentioned earlier (the European institutions, the Grand Place, the Atomium and the Manneken-Pis), they still tend to limit themselves to the surroundings of the Grand Place, such as the Cathedral of Saints Michael and Gudula for example. Séverine Provost (Be Culture) agrees, confirming that when international tourists think of Brussels, they only think of the City of Brussels, and not of the 19 municipalities that compose it.

Strategic objective 2 of the visit.brussels action plan also clearly identifies this problem (cf. 3.2.C), aiming to disperse tourists over the whole territory of Brussels in order to avoid concentration in the Grand-Place and its surroundings. This would also address a factor of dissatisfaction among tourists visiting Brussels, since 40% of them felt it was too crowded in certain locations during their trip in the city, compared to an average of 28% for Flemish cities (cf. 3.1.B). Although, as Wim Nicolai (Brussels Booking Desk) stresses, Brussels is not subject to overtourism and there is still room for more tourists, it is essential that they do not all concentrate in the same area around the Grand Place in order not to worsen the feeling that the city is too crowded in certain places, which has a negative effect on the quality of the stay. Moreover, by increasing the visibility of the entire tourist offer, the average length of stay, which is currently only 1.90 days (cf. 3.1.C), should logically increase.

## A. Brussels Card

### a. Features

So what could be concrete solutions to promote the lesser-known heritage of Brussels and thereby make tourists stay longer ? Or vice versa, how could tourists be persuaded to stay longer in order to visit more of Brussels' cultural heritage ?

In fact, there is an initiative that already partly addresses this : the Brussels Card. It gives free access to 48 museums and attractions for 24 hours (29€), 48 hours (39€) or 72 hours (46€), as well as discounts on other attractions, shops, restaurants and bars, along with an information guide, a city map and a museum map. For an extra charge (8€, 15€ or 19€ respectively), unlimited access to STIB public transport can be added (cf. 3.2.C). If this option is added, a ticket must be collected before the first journey from an automated sales machine, by entering the numbers on the Brussels Card.

In detail, the 48 museums and attractions to which the card gives access are (visit.brussels, n.d.) :

- The Crossbow Guild Museum of Brussels (1000 Brussels)
- Brel Foundation (1000 Brussels)
- Garderobe Manneken-Pis (1000 Brussels)
- KBR (1000 Brussels)
- MOOF - Museum Of Original Figurines (1000 Brussels)
- Art & Marges Museum (1000 Brussels)
- Autoworld Brussels (1000 Brussels)
- Museum of the Belgian Brewers (1000 Brussels)
- BELvue Museum (1000 Brussels)
- Centre for Fine Arts – Bozar (1000 Brussels) *valid for one exhibition per day*
- Choco Story Brussels (1000 Brussels)
- Art & History Museum (1000 Brussels)
- Brussels City Museum (1000 Brussels)
- Fashion & Lace Museum (1000 Brussels)
- Fin-de-Siècle Museum (1000 Brussels)
- Belgian Museum of Freemasonry (1000 Brussels)
- Halle Gate (1000 Brussels)
- MIM - Musical Instruments Museum (1000 Brussels)
- Magritte Museum (1000 Brussels)
- Royal Military Museum (1000 Brussels)
- CENTRALE for Contemporary Art (1000 Brussels)
- Museum of Natural Sciences (1000 Brussels)

- Sewer Museum (1000 Brussels)
- Old Masters Museum (1000 Brussels)
- The Belgian Comic Strip Center (1000 Brussels)
- Coudenberg Palace (1000 Brussels)
- Jewish Museum of Belgium (1000 Brussels)
- Design Museum Brussels (1020 Brussels)
- Planetarium of Brussels (1020 Brussels)
- Schaerbeek Beer Museum (1030 Brussels)
- Autrique House (1030 Brussels)
- Train World (1030 Brussels)
- CIVA (1050 Brussels)
- Children's Museum (1050 Brussels)
- Villa Empain - Boghossian Foundation (1050 Brussels)
- Erasmus House (1070 Brussels)
- ULB Museum of Medicine (1070 Brussels)
- Migratie Museum Migration (1080 Brussels)
- Belgian Chocolate Village (1080 Brussels)
- La Fonderie - Brussels Museum of Industry and Work (1080 Brussels)
- MIMA - Millennium Iconoclast Museum of Art (1080 Brussels)
- René Magritte House Museum (1090 Brussels)
- Museum of Abstract Art (1090 Brussels)
- Wiels - Contemporary Art Centre (1190 Brussels)
- Botanique (1210 Brussels)
- Charlier Museum (1210 Brussels)
- Meise Botanic Garden (1860 Meise)
- AfricaMuseum (3080 Tervuren)

Of these, 27 are located in the City of Brussels (1000 Brussels) and 2 are not located in one of the 19 Brussels municipalities but in the surrounding area. The Brussels Card also grants discounts on other attractions and guided tours, including :

- Atomium : 4€ discount on the 16€ ticket price
- Mini-Europe (miniatures of the most iconic European monuments) : 2.50€ discount on the 17.30€ ticket price
- Imagine Belgium (15-minute VR flight around Belgium) : 2.50€ discount on the 10€ ticket price
- Koekelberg Basilica (panoramic view) : 2€ discount on the 8€ ticket price
- Hungry Mary's Beer and Chocolate Tour : 10€ discount on the 80€ ticket price
- ARAU (art nouveau and art deco guided tour) : 3€ discount on the +/- 15€ ticket price (ranges from 10€ to 20€ depending on the group size)

- Brussels By Water (boat trip in Brussels) : 1.50€ discount on the 6€ ticket price
- Brussels Town Hall (guided tour) : 4€ discount on the 8€ ticket price
- City Runs (running guided tour) : 6€ discount on the 24€ ticket price

Apart from that, the card gives discounts in a number of shops, restaurants and bars in Brussels.

#### *b. User reviews*

This tourist pass seems to be quite appreciated by tourists, as it receives an average rating of 4 out of 5 from 86 users on Viator, 4.10 out of 5 from 83 users on GetYourGuide, an average rating of 8.10 out of 10 from 81 users on Civitatis. Below is a summary table of the most frequently mentioned positive and negative points of the Brussels Card. The reviews analysed range from the year 2017 to 2022.

Positive points	Quotes
<b>Price</b>	<p>« The cost of the card is not high compared to other capitals. »</p> <p>« It pays off quickly. »</p> <p>« A great money-saving option for those interested in museums! »</p> <p>« It is worth it if you visit more than 3 museums. »</p> <p>« After only 3 museums, it was worth buying the card. »</p>
<b>Quantity and quality of attractions and museums included</b>	<p>« It gave us a very good appreciation of the main attractions in Brussels. »</p> <p>« Excellent system that allows for an interesting price to have access to many museums and historical places... »</p> <p>« Ideal for having access to many museums with a single card. »</p> <p>« I could visit all the museums I wanted to see. It is an excellent possibility to save on money. »</p>

<b>Usefulness of the information guide and maps</b>	<p>« The maps and information obtained when buying the card were useful. »</p> <p>« The guide was very useful for reading what you are interested in. »</p> <p>« Having all the information at hand, it was easy to choose the museums and attractions we were more interested in. »</p>
<b>Useful tool for planning the trip</b>	<p>« It is possible to order it before the trip, and to take stock of all the museums to see. »</p>
<b>Time saving and awareness of the card by all cultural actors in Brussels</b>	<p>« Everyone knows this card, entering museums with it took a maximum of 10 minutes. »</p> <p>« The use of the card in the museums worked perfectly and without any problems. »</p>
Negative points	Quotes
<b>Some flagship attractions not included</b>	<p>« Mini Europe or Atomium where it gets really expensive are unfortunately only discounted. »</p> <p>« This card (24 hours) is not at all interesting to do the Atomium and Mini Europe, which we had planned. Because it is only a small discount. »</p>
<b>Practicality and technical issues</b>	<p>« The voucher (pdf, received in the e-mail confirmation) did not work for the scan. So I had to negotiate my entrance at each museum visit. »</p> <p>« The problem is that none of the museums could scan the barcode (both in the application and in the voucher sent to my email address). »</p>

	<p>« Be careful to make a prior reservation to visit museums and other sites... it is often required. »</p>
<b>Missing or unclear information</b>	<p>« I bought the 24-hour card with the STIB option, but I could not use it on the vehicles to and from the airport. »</p> <p>« Audio guides are not free. This is not clearly stated in the description... »</p> <p>« On Monday the museums were closed, they do not state it on the website. »</p>
<b>Public transport not included in the standard card</b>	<p>« You could have included internal travel passes (train, tram, metro) which would make it easy to explore Brussels, parks, museums, etc. »</p> <p>« STIB transport is not included in the pass... and this is clearly not stated. »</p> <p>« I was expecting the bus in the city to be included, so it should be clear that this is not the case. »</p>
<b>Public transport option not user-friendly</b>	<p>« I also took the transport option. The funny thing is that there is a complicated process to get the day pass in a metro ticket machine, which is not easily identifiable. I confused it with the train ticket machine. »</p> <p>« A thing that could definitely be improved is what to do if you lose the ticket for the metro and buses. I had to buy another ticket. »</p> <p>« They give you a code and you have to get the ticket in a metro station. Nothing like the Roma pass, the London pass or the Paris pass. They are behind the times. »</p>
<b>No option for more than 72 hours (3 days)</b>	<p>« An extra-large version (4 or 5 days) would also be useful. »</p>

<b>No special tariffs</b>	<p>« Children should have discounted passes. »</p> <p>« It would be honest to specify that teenagers pay little or nothing in museums. »</p> <p>« Does not take into account free access for the under 18 years old, neither does it take into account senior discounts, which does not make the card advantageous. »</p> <p>« If you are student, do not buy the card, you will pay less with the student discount! »</p>
<b>Information guide not user-friendly</b>	<p>« The guide is confusing. It is more like a dictionary. In any case, you have to plan enough to visit the sites, and the guide is of no help in this regard. »</p>
<b>Museum map not user-friendly</b>	<p>« It was difficult to find the museums. I spent a lot of time looking. A map with everything on one side would be better (ed. note : instead of double-sided at present). »</p>
<b>For culture lovers only</b>	<p>« The card is a good addition for visitors interested in culture. It was of little use to us. »</p>

As can be seen, the main positive point is the number of museums and attractions included in this pass at a competitive price. However, if one takes the example of the 24-hour pass, it is necessary to visit 3 museums (since the vast majority of the attractions included are museums) in 1 day to make it profitable. This makes some people state that it should be reserved for culture lovers. The fact that some of the most popular attractions are not included, such as the Atomium and Mini Europe, tends to reinforce this feeling. The Brussels Card does give a discount for these two attractions, but it does not exceed 25% of the ticket price.

Another option that is not included, but that can be added at an extra cost, is public transport. Although this is clearly stated for those who order the card directly through the visit.brussels website, this does not always seem to be the case for those who go through other intermediaries (such as GetYourGuide or Civitatis). Moreover, for those who opt for the public transport pass, the procedure for obtaining their ticket (by



encoding a code in a STIB machine) is considered to be outdated and impractical, at a time when digital technology offers much more convenient alternatives.

Other essential information about this tourist pass is not clearly communicated, or is drowned in a mass of information, by service providers such as GetYourGuide and Civitatis but also by visit.brussels. For example, if a tourist opts for the public transport option and lands at Brussels Airport, they need another ticket to get to the city, the "Go2City", which is not included in the Brussels Card and costs 7€. As a result, they start their stay with a bad experience and an unforeseen extra charge. Another essential piece of information that is not much emphasised is the fact that most of Brussels museums are closed on Mondays. Yet, a tourist who orders a 24-hour pass for Monday only or a 48-hour or 72-hour pass that covers Monday will not be shown any warning when it comes to paying. Once on site, this can result in a feeling of having been tricked, and once again lead to a bad experience of their stay in Brussels.

Under normal circumstances, the Brussels Card is also appreciated for saving time by allowing people to avoid queues. Well known to the Brussels cultural actors, it has apparently never caused any problems at the entrance to museums or other attractions. Unfortunately, some technical problems affect this good functioning, with the barcode of the card not always being able to be scanned. Above all, the covid has been here. Although this is increasingly less the case, some museums still require prior reservation, for which the Brussels Card is of no use.

Other requests corresponding to specific demands deserve to be pointed out, particularly as they are relevant. For example, it was mentioned that it is not interesting to acquire the Brussels Card for children, students and seniors, since they already benefit from special tariffs in museums, whereas the price of the Brussels Card does not take age into account. It was also complained that there is no pass beyond 72 hours, and that the few tourists who stay more than 3 days in Brussels have to buy several cards if they want to benefit from the advantages of the Brussels Card during their entire stay.

Lastly, the information guide and maps provided with the Brussels Card are praised for their usefulness and comprehensiveness. The 2019 version of this guide can be consulted at the following link :

[https://visit.brussels/site/binaries/content/assets/pdf/brussels\\_card\\_brochure\\_2019\\_web.pdf](https://visit.brussels/site/binaries/content/assets/pdf/brussels_card_brochure_2019_web.pdf)

It provides all the necessary information (description, opening hours, access via public transport, etc.) on each attraction and museum included in the Brussels Card. Its comprehensive nature actually makes it unclear for some users, for whom the

"dictionary format" does not encourage them to look at it. Similarly, the map is not much more praised for its user-friendly aspect.

### *c. Shortcomings*

With regard to the cultural offer in Brussels, Wim Nicolai (Brussels Booking Desk) believes that the problem lies in the overly diverse offer, which means that tourists have to look for what makes Brussels interesting to them, as shown by the lower satisfaction score that they give to the attractions and activities in Brussels compared to other Belgian destinations (cf. 3.1.B). In this sense, the Brussels Card does not help tourists with its 48 attractions, since it simply groups them into several categories in its information guide once the purchase has been made : Art, Brussels, History, Gastronomy, Science, nature & technology and Best kept secret. Moreover, tourists want less and less of the packaged offer that leaves them little choice, they want to be actors of their experience. Especially since the package they are offered does not include two of the city's most popular attractions, namely the Atomium and Mini Europe.

Beyond the concept, it is the very aspect of the Brussels Card that seems inadequate. As observed in the GlobalWebIndex 2021 report (cf. 1.2), digital has become even more important than before since the covid-19 crisis. Destinations must therefore adapt themselves, if they have not already done so, to offer a seamless and entertaining experience. The card itself is quite simple to use, as it can be downloaded to the smartphone for those who have purchased it online, meaning that there is no need to print out anything. But it is the add-ons around this card that are far from offering a seamless and entertaining experience, starting with the public transport option. While entering a code in a STIB automated sales machine may not seem complicated to a national tourist, it is a different story for international tourists, for whom it is not so easy to locate these machines and not to confuse them with those of the SNCB. The information guide, like the Brussels Card, can also be downloaded digitally, in the form of a 50-page pdf. User reviews seem to indicate that, although interesting, this guide is not the most entertaining way to learn more about the Brussels cultural heritage. It should also be added that this guide does not contain information on free places and attractions. Attractions that therefore do not need to be covered by the Brussels Card, but which still deserve to be highlighted. This includes not only the Grand Place and Manneken-Pis, but also the Parlamentarium, the House of European History, the Cathedral of Saints Michael & Gudula and more.

A further point still related to digital : although the Brussels Card can be purchased online through several websites, including that of [visit.brussels](https://www.visitbrussels.com), its existence is never mentioned on accommodation booking websites, such as [Booking.com](https://www.booking.com) or [Brussels hotel](https://www.brusselshotel.com)

websites, which represent nonetheless the main source of information for tourists before their trip (cf. 3.1.B).

#### *d. Recommendations*

The priority is to make it easier for tourists to find what they like among the very broad cultural offer. Given the richness of Brussels' cultural heritage, as recognised by all the experts interviewed, it is not acceptable that the satisfaction score given by tourists in relation to attractions is lower than that of other Belgian destinations (cf. 3.1.B). It should also be demonstrated that, thanks to the diversity of the offer in Brussels, the purchase of a tourist pass (the Brussels Card) is not reserved for culture lovers.

Promoting the diversity of the cultural offer is actually quite natural for Brussels, given that, as Frédéric Meseeuw (BOZAR) emphasises, it does not host any world-class museums or blockbuster exhibitions or events, and therefore cannot compete with cities such as Paris, Madrid or Saint Petersburg, for which the Louvre, the Prado or the Hermitage alone justify a city break. Especially since the only fields in which Brussels stands out, such as art nouveau and contemporary art, dance and theatre, correspond to niche tourism.

Based on this observation, the categories used by the Brussels Card to group museums in its information guide will be taken up : Art, Brussels, History, Gastronomy, Science, nature & technology and Best kept secret. The content of these categories is detailed below. As for attractions and tours, they fall into two distinct categories.

##### ➤ Art

- MOOF - Museum Of Original Figurines
- Art & Marges Museum
- Centre for Fine Arts – Bozar
- Fin-de-Siècle Museum
- Magritte Museum
- CENTRALE for Contemporary Art
- Old Masters Museum
- The Belgian Comic Strip Center
- MIMA - Millennium Iconoclast Museum of Art
- René Magritte House Museum
- Wiels - Contemporary Art Centre
- Botanique

- Brussels
  - Garderobe Manneken-Pis
  - Brussels City Museum
  - Halle Gate
  - Sewer Museum
  - La Fonderie - Brussels Museum of Industry and Work
- History
  - BELvue Museum
  - Art & History Museum
  - MIM - Musical Instruments Museum
  - Royal Military Museum
  - Coudenberg Palace
  - Jewish Museum of Belgium
  - AfricaMuseum
- Gastronomy
  - Museum of the Belgian Brewers
  - Choco Story Brussels
  - Belgian Chocolate Village
- Science, nature & technology
  - Autoworld Brussels
  - Museum of Natural Sciences
  - Planetarium of Brussels
  - Train World
  - ULB Museum of Medicine
  - Meise Botanic Garden
- Best kept secret
  - Fashion & Lace Museum
  - Belgian Museum of Freemasonry
  - Autrique House
  - Villa Empain - Boghossian Foundation
  - Erasmus House
  - Charlier Museum

The idea is to use these themes to create 24-, 48- or 72-hour programmes that are clearer for tourists and no longer a too extensive and diversified list. Concretely, if the Brussels Card is kept in its current form for the real eclectic culture lovers, new more targeted tourist passes will be created : Brussels Art Card, All About Brussels Card, Brussels History Card, Brussels Gastronomy Card, Brussels Nature & Science Card, Brussels Machinery & Technology Card and Brussels Best Kept Secrets Card. The aim is to give tourists more freedom of choice, as they no longer want a packaged offer (cf. previous section), while at the same time encouraging them to visit attractions that they would not visit without the tourist pass. The content of the various cards is detailed below. In italics are the elements that have been added to the Brussels Card classification.

➤ Brussels Art Card

- MOOF - Museum Of Original Figurines
- Art & Marges Museum
- Centre for Fine Arts – Bozar
- Fin-de-Siècle Museum
- Magritte Museum
- CENTRALE for Contemporary Art
- Old Masters Museum
- The Belgian Comic Strip Center
- MIMA - Millennium Iconoclast Museum of Art
- René Magritte House Museum
- Wiels - Contemporary Art Centre
- Botanique
- *Design Museum Brussels*
- *Museum of Abstract Art*
- *ARAU Tour (3€ discount on the ticket price)*

➤ All About Brussels Card

- Garderobe Manneken-Pis
- Brussels City Museum
- Halle Gate
- Sewer Museum
- La Fonderie - Brussels Museum of Industry and Work
- *Brussels Town Hall Tour (4€ discount on the ticket price)*
- *City Runs Tour (6€ discount on the ticket price)*

➤ Brussels History Card

- BELvue Museum

- Art & History Museum
- MIM - Musical Instruments Museum
- Royal Military Museum
- Coudenberg Palace
- Jewish Museum of Belgium
- AfricaMuseum
- *The Crossbow Guild Museum of Brussels*
- *Migratie Museum Migration*
- Brussels Gastronomy Card
  - Museum of the Belgian Brewers
  - Choco Story Brussels
  - Belgian Chocolate Village
  - *Schaerbeek Beer Museum*
  - *Hungry Mary's Beer and Chocolate Tour (10€ discount on the ticket price)*
- Brussels Nature & Science Card
  - Museum of Natural Sciences
  - ULB Museum of Medicine
  - Meise Botanic Garden
  - *Brussels By Water Tour (1.50€ discount on the ticket price)*
- Brussels Machinery & Technology Card
  - Autoworld Brussels
  - Planetarium of Brussels
  - Train World
  - *Imagine Belgium (2.50€ discount on the ticket price)*
- Brussels Best Kept Secrets Card
  - Fashion & Lace Museum
  - Belgian Museum of Freemasonry
  - Autrique House
  - Villa Empain - Boghossian Foundation
  - Erasmus House
  - Charlier Museum

Of course, the price of each card will be lower than the standard Brussels Card but will not be uniform among them. It will depend on the number of attractions and museums included in each of them. What remains to be settled is the issue of the leading attractions

that attract the largest number of tourists, the Atomium and Mini-Europe, and which are currently not included in any of the cards. The most realistic option that could be considered is to give tourists the possibility, at the time of purchase, to add these two attractions to their card (Brussels Art, All About Brussels, Brussels History, Brussels Gastronomy, Brussels Nature & Science, Brussels Machinery & Technology or Brussels Best Kept Secrets) for an additional fee corresponding to the full price minus the discounts offered by the standard Brussels Card, i.e. 12€ for the Atomium and 15€ for Mini-Europe.

In the same vein, discounts in high-quality restaurants and bars could be added to the Brussels Gastronomy Card. As Séverine Provost (Be Culture) and Ludovic Goethals (Ambitious Brussels) point out, this is not in short supply in Brussels, as evidenced by the many Michelin-starred restaurants in the capital. Not to mention the other high-quality restaurants that are emerging and are on their way to becoming starred, but which are more accessible to the majority of people, as Wim Nicolai (Brussels Booking Desk) notes. In the context of the Brussels Gastronomy Card, it is probably more realistic and relevant to promote these kinds of restaurants as a priority.

Another point raised by Wim Nicolai is the need, when an initiative is carried out in collaboration with a public partner (in this case [visit.brussels](http://visit.brussels)), to not exclude any partner, otherwise the project may not be implemented. This is why it is crucial that every cultural institution included in the standard Brussels Card is also included in one of the newly created cards. The fact that the partners of the new tourist passes would remain the same makes the creation of these passes more realistic. There is no reason why an attraction or museum that has agreed to be included in the Brussels Card would not agree to be included in the Brussels Art Card, All About Brussels Card, Brussels History Card, Brussels Gastronomy Card, Brussels Nature & Science Card, Brussels Machinery & Technology Card or the Brussels Best Kept Secrets Card. All the more so as they have much to gain from collaborating to a certain extent with their competitors. (cf. 1.1.B)

One addition that could be made to these attractions and museums, however, is the integration of paid events into tourist passes, such as the Ommegang in the Brussels History Card, provided these are purchased for the period during which the events in question take place. This could be either the full ticket or a discount, depending on the price, and it would address another problem identified by Séverine Provost, namely that the vast majority of cultural events in Brussels attract mainly Belgian visitors and few international tourists.

Lastly, apart from the content of the Brussels Card, some elements could be improved, such as promotion. As observed in the previous section, the existence of this tourist pass is never mentioned on accommodation booking websites which nevertheless represent the main source of information for tourists before their trip (cf. 3.1.B). It would therefore be useful if the traditional Brussels Card, the Brussels Art Card, the All About Brussels Card, the Brussels History Card, the Brussels Gastronomy Card, the Brussels Nature & Science Card, the Brussels Machinery & Technology Card or the Brussels Best Kept Secrets Card were highlighted on these websites, or even directly proposed for purchase. As Wim Nicolaï explains, it is essential to inspire tourists to come to Brussels when they are considering the various options available for a city break. The fact that Brussels offers almost tailor-made solutions for visiting cultural heritage is part of what could distinguish it from other destinations and should thus be emphasised at this point in the tourist's buying process. With this in mind, it would be advisable to discuss the matter around a table with the Brussels hotels as a first step, since implementing a similar system with platforms such as Booking.com seems far less realistic.

Child, student and senior versions of the various tourist passes could also be created. If not, tourists would appreciate being informed before purchasing a pass that preferential tariffs already exist for these categories of people in Brussels' attractions and museums. The conversion of the information guide into a digital application would be another response to a growing request from tourists for more convenience in their search for information on what to do in Brussels.

As a final note, this recommendation is fully in line with strategic objective 2 of the visit.brussels action plan (cf. 3.2.C), which aims to position Brussels as « a tourist and cultural destination, offering a quality and varied urban life [...] for the various target audiences » (visit.brussels, 2020). Indeed, this recommendation stresses the fact that the cultural offer of Brussels is so varied that every city tripper, whatever their tastes, can find something of interest to them. This is a quality that few destinations can boast.

## B. Immersivity and interactivity

Another challenge, beyond promoting the diverse cultural heritage of Brussels, is to increase its accessibility. Patrick Bontinck (visit.brussels) judges that there is still a lot of work to be done in this area. He takes the example of museums, which in their promotion frequently tend to target people who already go to museums, instead of trying to attract a new audience, in particular young people. Séverine Provost (Be Culture) endorses the need to stop speaking only to the initiated, while pointing out that this problem of an overly elitist culture is not specific to Brussels. She adds that culture is by nature not meant to be exclusive, and that the majority of artists want their art to be disseminated



as widely as possible. Patrick Bontinck agrees, stating that culture is above all an encounter with the other(s).

In his opinion, a more accessible culture requires a paradigm shift, from a focus on the artwork to a focus on the experience. This also means assuming that people do not have any prior knowledge before coming to a museum or an exhibition, and that it is thus necessary to retrace the artist's career in the context of their era, preferably with an intelligent scenography that makes the visitor want to learn more and that gives them a genuine experience. This is especially true for the attractions included in the Brussels Art Card (cf. 4.2.A), as these are the ones that may be the least accessible to the "uninitiated". As Séverine Provost points out, museums and exhibitions that deal with subjects such as music or cinema are logically more accessible than museums or exhibitions that deal with plastic or contemporary art. Ludovic Goethals (*Ambitious Brussels*) uses the example of art nouveau, a very important movement in Brussels (cf. 3.3.A), but one that is rather complex and consequently known by few people.

Frédéric Meseeuw (BOZAR) can attest personally to this issue of cultural elitism and the possible solutions to it, as in recent years the Centre for Fine Arts has regularly presented immersive exhibitions that incorporate technology in order to provide the visitor with a better experience. He confirms that there is a real interest in this type of exhibition and that they tend to attract the general public much more easily than a traditional exhibition. He also distinguishes between exhibitions that use virtual reality, for which the audience remains niche and is in any case limited to the number of VR headsets available, and immersive exhibitions using video projections such as *Viva Frida Kahlo*, which attract a larger number of people and enable cultural institutions to increase their sales figures.

It is precisely this desire to generate higher revenues by proposing exhibitions that incorporate digital technology at all costs, sometimes to the detriment of artistic quality, that seems to pose a problem and to be the source of lively discussions within cultural institutions. Séverine Provost admits that while some immersive exhibitions are of irreproachable quality in her opinion, others are detrimental to the artist's work. The importance of making art accessible to the general public should therefore not be used as an excuse to disrespect the artworks displayed.

Despite the fact that some immersive exhibitions seem to succeed in the dual objective of respecting the artist's work while making it more accessible, some cultural actors are opposed to them on principle. Frédéric Meseeuw evokes a form of snobbery in the sector that maintains the perception of a museum with a one-way communication, knowing exactly what it wants to tell people and doing so in the way it considers most

appropriate, i.e. by putting the artwork on a pedestal, by making it sacred. Although this very conservative view is not shared by everyone, there is a certain consensus among cultural stakeholders that the best way to connect with an artwork is to observe it in a contemplative state. Digitalising a work and projecting it in 360° is thus not viewed very favourably, even if it is a means of reaching a wider audience. Consequently, there is a degree of complementarity between these two opposing formats, the "classic" format, which must be preserved for art lovers who like to contemplate a work in its purest form, and the immersive format, which must be developed in order to attract an audience that is not interested in traditional museums and exhibitions.

In addition to immersive exhibitions, interactive exhibitions also meet a demand from the general public, who increasingly want to be an actor of their experience, and no longer a mere spectator (cf. 4.2.A). Séverine Provost also recognises the interest in departing from the traditional exhibition model, to provide the public with the feeling of having lived an experience that is unique and unusual, for example through participation.

Beyond the application of the concepts of immersivity and interactivity to museums, exhibitions and more widely to cultural heritage, Frédéric Messeeuw insists on the importance of not overlooking the basis of what makes this heritage attractive, namely preservation and conservation, which is in fact one of the most commonly recognised benefits of heritage (cf. 1.1.D).

Finally, still with the aim of making culture accessible to as many people as possible, he puts forward the idea of integrating it into public space on a larger scale. In other words, to bring culture to those who do not come to it. Besides the presence of artworks such as sculptures in the streets, public events such as Ommegang and the Zinneke Parade can play an essential role in the accessibility of culture, but also in the reinforcement of the city of Brussels' identity, and more specifically that of its city centre.

However and as a final point, it should not be forgotten that tourist passes, the incorporation of immersivity and interactivity, and more generally cultural heritage alone will not be enough to significantly increase the overall attractiveness of the destination. Indeed, Patrick Bontinck ([visit.brussels](http://visit.brussels)) and Ludovic Goethals (Ambitious Brussels) both agree that tourists come for a package that is multifaceted, of which heritage is definitely part. But the cities that attract tourists solely because of their heritage are those that, as detailed at the beginning of this section, host world-class museums, exhibitions or events, such as Paris, Madrid or Saint Petersburg. Brussels must therefore not only work on the attractiveness of its cultural heritage, but of the destination as a whole. It must consequently ensure that it provides high-quality

hospitality, as well as a safe climate, a clean city and easy mobility. On these last two points in particular, there is still work to be done. Tourists give a fairly low score to the cleanliness of the city, in comparison with other Belgian cities (cf. 3.1.B). Mobility is also one of the other weak points of Brussels compared to other cities, as Séverine Provost acknowledges. Frédéric Messeeuw believes, for example, that few tourists will be willing to spend 30 minutes on the tram to visit The Erasmus House. If Brussels wants to promote its lesser-known cultural heritage, this will require, among other things, an improvement in mobility and a greater emphasis on soft mobility, which is one of the fastest growing trends according to the GlobalWebIndex 2021 report (cf. 1.2).

## Conclusion

In conclusion, this thesis has met the two main objectives that were set, namely, to define the current value and attractiveness of Brussels as a tourist destination, and to explore possible ways of improving this attractiveness through cultural heritage.

On the one hand, it was first identified that Brussels was a city break destination. This was an essential step, given that tourists are not a homogeneous group and each of them has different needs, and that the destination must therefore clearly target which segment it is aimed at.

As a city break destination, the accessibility of Brussels in terms of time and cost, both by train and by plane, for most European tourists is a real asset, as city trippers are primarily looking for an easy and inexpensive destination to reach. This is obviously not their only criterion of choice, and they are also looking for a destination with a fun and positive image that will allow them to escape and live experiences. Brussels is rather far from this image at an international level, as its image is not always clear to international tourists, due to the diversity that characterises the city, even though for many of them it is closely linked to Europe. Reducing Brussels to the European institutions does not, however, take into account the richness of Brussels' cultural heritage, beyond the European cultural heritage, and may even lead some to label Brussels as « the city of boring politics ».

On the other hand, the fact that the European aspect of Brussels is so widely recognised means that international tourists who come to the capital often limit themselves to the European institutions during their visit, to which they only add the other most famous places and monuments of the capital: the Grand-Place, the Atomium and the Manneken-Pis. There is therefore a real need to highlight the wider cultural heritage of Brussels, to increase its attractiveness and demonstrate that it is a city where it is possible to have enriching and entertaining experiences.

Above all, the diversity of the cultural offer in Brussels is such that any city tripper can find something of interest, which is not necessarily the case in other destinations. This is the message that the main recommendation made in this thesis aims to convey, that is to say the creation of a number of alternatives to the current tourist pass, the Brussels Card. In short, the Brussels Art Card, All About Brussels Card, Brussels History Card, Brussels Gastronomy Card, Brussels Nature & Science Card, Brussels Machinery & Technology Card and Brussels Best Kept Secrets Card are all intended to offer tourists not a package (like the Brussels Card), which they want less and less of, but an almost tailor-made solution that allows them to discover more of the cultural heritage than they would have

done without the pass, and therefore potentially encourages them to stay longer in Brussels.

Nevertheless, as the attractiveness of the cultural heritage alone is not sufficient to significantly increase the general attractiveness of the city, other research could focus on the hospitality offer or mobility in the city, which have only been superficially addressed in this thesis.

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