

Tourism in Brussels, Capital of the 'New Europe'

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ABSTRACT

This paper considers the potentials and pitfalls of European Union enlargement for tourism development in Brussels, and it explores the role of eurocrats in mediating Brussels as a destination. As a result of enlargement, Brussels may consolidate and eventually strengthen its position as a destination for business tourism. Eurocrats may be a major consumer group but as champions their role is tempered by a discrepancy between visitation and appreciation of the city's offer. By inspecting eurocrats' views in a framework of current marketing attempts and the politics of promotion, the paper attempts to make recommendations on how to take advantage of new opportunities accession may bring. Copyright © 2005 John Wiley & Sons, Ltd.

Received 12 December 2003; Revised 3 May 2004; Accepted 6 September 2004

Keywords: Brussels; market enlargement; eurocrats; destination management; destination imaging.

INTRODUCTION: GLOBAL CITIES, LOCAL PERSPECTIVES

Major world cities do not exist in isolation; rather, they are embedded in intricate networks (Sassen, 1994;

Short and Kim, 1999). Among and within these networks there is concerted competition, not least for capital, labour and influence. Tourism is a central feature in the mediation of these networks and the operation of the cities themselves (Hoffman *et al.*, 2003). As Church and Frost (2004) note, tourism is a vital component in the functioning of labour markets in global cities. Perhaps more importantly international mobility is a key feature in the production and consumption of major urban spaces. Business is transacted and politics are played out through international visits. Tourism offers place marketeers a platform from which to sell their cities. Visitors represent a pivotal audience for sophisticated campaigns and slogans. Not only do such messages condition their consumption experiences, but as proactive champions, they can advance a city's message through word-of-mouth advocacy in complex and extensive social networks.

Competition among cities for visitors is becoming increasingly intense and extracting increasing market share ever more difficult (Wöber, 1997; Shaw and Williams, 2002). Part of the problem relates to the need to develop a distinct niche in international tourism markets and to the difficulties in establishing unique selling propositions (Ashworth and Voogd, 1994; Short and Kim, 1999). Contemporary urban image making may be more sophisticated, but it is also a highly problematic exercise (Selby, 2004). Imitation may often be the sincerest form of flattery, but as Short and Kim (1999) have recognised, the most creative and innovative approaches are frequently copied and transmuted in other destinations to neutralise temporary competitive advantages.

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In this context, Brussels possesses a notable advantage as an urban destination for international tourism which is not easily reproduced elsewhere. As the *de facto* capital of the European Union (EU), Brussels enjoys a unique status among world cities. As home to much of the EU apparatus, Brussels attracts significant numbers of visitors and overnight stays, as well as extended, albeit temporary forms of mobilities through the presence of so-called 'eurocrats'. These may be loosely defined as European citizens working temporarily in Brussels and/or attending meetings in Brussels on a very frequent basis. Eurocrats account for a majority of the business travel market to Brussels and they represent a relatively high-spending cohort. As important, given their travel behaviours, they also function as key ambassadors for the city.

This paper explores the predicted potentials and pitfalls of the recent EU expansion for the development of tourism in Brussels. It reports on research carried out in 2002 and 2003 prior to enlargement. The study was set up to identify the implications not only for the business and MICE markets, but also for leisure markets. In theory at least, with enlargement from 15 to 25 member states Brussels can and should take advantage of its leading and reinforced position as the main meeting place and centre of decision making in Europe (see Europarl, 2004). Ever since 1998 when MEPs record about 1300 international organisations as being registered as operating in Brussels, there has been a gradual increase in institutional thickness. Alongside the EU, the presence of NATO and many other European institutions function as a magnet for specific types of commercial, cultural, social and political activities. Visits by business tourists and, in particular, eurocrats are expected to increase. However critical questions prior to the enlargement of 2004 were about the importance of eurocrats as a marketing target group and whether Brussels is adequately equipped to capitalise on the opportunities enlargement presents. In the case of the latter, one particular objective was to examine in more detail the current strong and weak points in the 'hardware', 'software' and 'orgware' of Brussels' tourism (Jansen-Verbeke and Lievois, 1999).

The paper is structured into four further sections. A discussion of broad tourism trends in Brussels prefaces discussion in the third section of a web-based survey of eurocrats' experiences and attitudes as visitors in, and ambassadors for, Brussels. As Pearce's (1999) work on Paris makes clear, at the microscale of the attraction or event, tourists have identifiable and distinctive demands on places and merit greater attention as users of space. We would contend that eurocrats are no different and investigation of their behaviours and attitudes is vital to the future development of Brussels. Indeed, in the fourth section, the survey results are considered in the context of wider destination management issues facing the city; this prefaces a discussion of the conceptual questions this brief study precipitates.

BRUSSELS' INBOUND MARKET: CURRENT POSITION AND FUTURE POTENTIALS

According to the Belgian National Institute of Statistics (NIS), 2344096 arrivals were registered in Brussels in 2001 and these accounted for 4444761 bed-nights. Visitors from the 'old' 15 EU Member States (i.e. member states prior to 2004 enlargement) contributed approximately 70% of this volume and in 2001 just over 2.7 million overnight stays were made by international cross-border visitors originating inside the existing 15 EU member states (Nijs and De Bruyn, 2002) (Table 1).

Business was (and remains) the main motive for trips to Brussels; in fact, on average, 74% of overnight stays prior to enlargement were business-related and among visitors from the 'old' 15 EU member states, business-related reasons accounted for 67% of the total. In general, there was an increase in the proportion of business visits in 2001 compared with 1992, with the exception of those from The Netherlands and Denmark. In both these countries the orientation towards Brussels for reasons of leisure gained importance, not least due to the growth of short-stay visits from spatially proximate markets.

Although in general international arrivals from existing EU member states increased in 2001 compared with 1992, there were also notable exceptions: declining tourist flows stemmed from Italy, Sweden, Greece and

Table 1. Number of overnight stays in the Brussels Metropolitan Area originated from the first 15 EU member states (1992 and 2001) — by motive. Source: Ecodata of the Federal Government of Belgium (2001)

Country of origin	Overnight stays in Brussel Metropolitan Area							
	1992				2001			
	Leisure (%)	Business (%)	Other (%)	TOTAL	Leisure (%)	Business (%)	Other (%)	TOTAL
UK	35.5	52.1	12.4	400308	37.6	58.1	4.3	817290
France	33.7	57.9	8.4	372915	33.5	59.8	6.7	479123
Germany	38.4	48.2	13.4	296818	41.0	54.0	5.0	340786
Netherlands	37.4	50.0	12.6	193805	48.0	46.4	5.5	308060
Spain	40.1	50.0	9.6	178035	35.4	58.4	6.2	198141
Italy	35.0	57.2	7.8	208851	28.3	66.0	5.7	185914
Sweden	24.6	51.0	24.4	84442	20.9	75.4	3.7	79304
Denmark	25.2	60.8	14.0	57662	49.1	48.1	2.8	74039
Greece	27.0	63.4	9.6	52931	25.9	69.2	4.9	49281
Ireland	20.9	69.4	9.7	27551	25.3	66.2	8.5	48466
Finland	24.1	73.9	2.0	25894	19.6	77.0	3.4	39678
Portugal	21.0	70.0	9.0	58686	28.7	67.0	4.3	37560
Austria	25.0	66.2	8.8	35434	20.7	75.5	3.8	28757
Luxemburg	17.7	75.3	7.0	24623	20.9	72.4	6.7	18046
Total				2017955				2704445

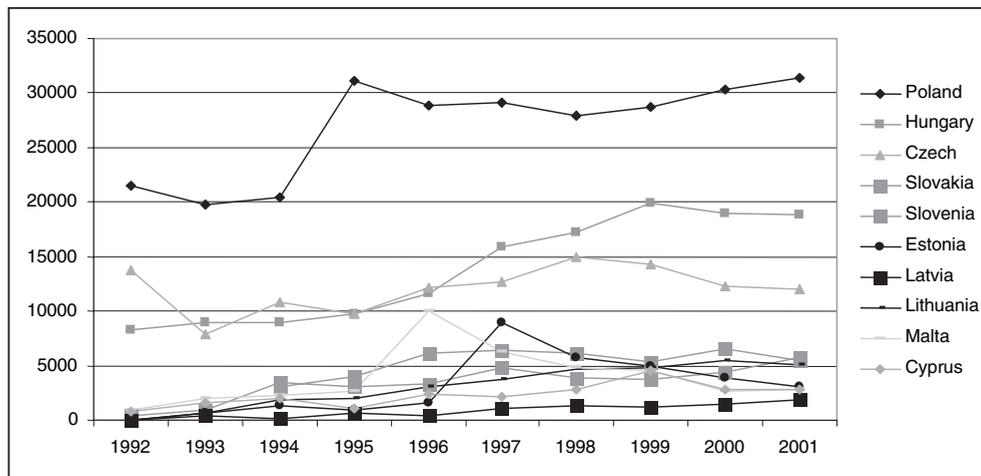


Figure 1. Number of overnight stays in Brussels originating in the 10 new EU Member States (1992–2001). Source: *Compendium of Tourism Statistics — 2002 Edition* (WTO, 2002).

Portugal. The only (partial) explanation is that the period of joining the EU (between 1981 to 1995) caused a high intensity of travel to Brussels from these states, a situation which a few years later seems to have switched to a slightly lower level.

Set against the backdrop of earlier consumption patterns, additional numbers of vis-

itors from the 10 new member (AC10) states have the potential to make a significant additional contribution to the tourism sector (Figure 1). Although there was a notable rate of growth in overnight stays from the AC10 states in the period 1994 to 2001, the scale of visitation remained modest in relative terms. Numbers of bednights from the AC10 states

increased by 64% from just 55 000 in 1994 to a total of approximately 90 000 in 2001, but this still represented merely 2% of the city total.

For tourism managers and administrators in Brussels, strategic issues surround the prediction of the likely magnitude of the increase in visitor numbers derived from the accession of new member states, as well as which member states offer the strongest and most significant growth potentials. Two general observations are important at this point. First, added value from EU enlargement is likely to be derived from two principal sources: leisure-oriented visitors, and business tourists, among whom a new cohort of eurocrats will figure. Indeed, demand from an enlarged eurocracy should not be underestimated.

In view of impending expansion, the European Commission created 3900 new jobs, of which 3400 were for administrators. With the recognition of 20 official languages — which means 380 language combinations during plenary sessions — further considerable increases are predicted in the number of official translators. These direct increases in EU and European Commission staffing look set to be complemented by additional indirect EU-related job opportunities for lobbyists, delegates and diplomats of the new member states. According to a recent media survey (April 2004) about 10 000 lobbyists scatter around the EU organisations in Brussels in order to defend the interests of enterprise, non-government organizations (NGOs), and the states and regions they represent. There is, however, no register of lobbyists and their representation of stakeholders in the EU. They will join the EU network in Brussels, which is now estimated (by the eurocrats themselves) to include 30 000 employees.

As a second observation, it is important to form realistic assessments of the likely limits to growth. Although the total population in the ten new EU member states was estimated to be 75 million, prior to enlargement the actual orientation of markets in the AC10 towards Brussels was still rather weak (Figure 1). In fact, depressed volumes of outbound tourism reflected the problematic economic position in some AC10 states. The size of some member new states and/or their levels of economic development suggest them as more likely con-

tributors to increased inbound tourism in Brussels, for leisure travel in particular. For instance, with a population of 38 million, Poland is by far the most important new market. Hungary and the Czech Republic, each with 10 million inhabitants are second-tier markets. In contrast, countries such as Malta and Cyprus are considered minor markets.

BRUSSELS: A TOURISM PLACE FOR EUROCRATS?

Thus, accession offers the city considerable growth potential. Development into a top-level European and global administrative, business and meeting place represents a new opportunity to reinvigorate, and an incentive for re-imagining, Brussels as a destination. Not only will the leisure market benefit from the political changes but also business tourism to, and temporary mobilities in, Brussels hold potential. Indeed, it is to the latter that we now turn our attention. Although each of the AC10 had deputations before formal enlargement, the process of fully integrating these states into EU operations has resulted in the community of European (and non-Belgian) citizens in Brussels rapidly expanding. In addition to the numerous business visitors, this includes many Europeans staying temporarily in Brussels for professional reasons. To understand the ways in which this community of Eurocrats live, experience and consume Brussels as a tourism space clearly represents a significant insight to inform future developments and marketing strategies.

A web mail survey

In order to reveal more about the perceptions held by the eurocrats about tourism opportunities in Brussels, a survey was carried out during the spring of 2003. Because the network of eurocrats and European Union employees in Brussels is frequently contacted with questionnaires and consultations, on a wide range of topics, the challenge was to find diplomatic and user-friendly ways of engaging respondents and introducing our questions.

A web mail survey was chosen as the most effective method of collecting the

required data (cf. Dillman and Bowker, 2001), and this was eventually complemented by a number of interviews with key informants in this network. In collaboration with the Brussels–Europe Liaison Office, with European embassies and a European Member of Parliament, a list of 250 e-mail addresses of eurocrats was compiled to whom our questionnaire was sent. The final response rate was 50%. This was pleasingly high; according to Couper (2000), web mail surveys tend to yield a limited response and, as a rule, below the average response rate for regular mail surveys, which is 30–40%.

In terms of sampling, the respondent group does not mirror the background population for two reasons: first, there is no complete listing of eurocrats in the city, or those with access to the internet; and second, as befits most web-based surveys, the respondents were largely self-selecting (cf. Meethan, 2004); that is, responses were received from those who chose to respond. Bias in the sample is reflected in basic variables such as gender and age. Of the respondents, 62% were female and 38% male, and younger people were disproportionately overrepresented: 27% of respondents were aged between 25 and 30 years. In contrast, just 20% of respondents were over 40 years. Respondents from new member states comprised just 6%, and the most represented states were Great Britain (16%), Germany (11%), Italy (11%), Spain (9%), The Netherlands (8%) and France (7%).

Initial survey results

Notwithstanding sampling limitations and the characteristics of the respondent group, these indicative results offer the as yet only insight into eurocrats and their appreciation of tourism in Brussels. As such, our results offer an orientation and inspiration for the process of image building of a tourist destination among specific target groups (cf. Echtner and Ritchie, 2003).

For many respondents, their first experience of Brussels as a tourist destination was related to their first business trip (50% of respondents). Leisure reasons were important in 28% of first visits, and stays with family and friends for 11%. In fact, 40% of respondents had previ-

ously visited Brussels as a holiday destination. Most eurocrats perceived Brussels predominantly as a place to work, and did not spontaneously associate it with a place for leisure activities. In the interviews it was frequently mentioned that eurocrats tend to spend their free time and weekends on the coast and in other places of interest in Belgium (e.g. cities of art) or in the neighbouring countries. Such an out-of-town orientation during their free time, however, did not necessarily also exclude participation in tourism and leisure activities in Brussels.

The questionnaire allowed for multiple answers concerning participation in leisure activities (Figure 2). Within Brussels, the favourite leisure activity was dining out (78%), followed by shopping (64%). Leisure activities such as visiting friends and relatives (55%), going to a museum (54%), attending an opera, theatre or film (54%) and enjoying the nightlife in Brussels (51%) were also notable. Sightseeing, although popular (48%), due to its less formal leisure pattern, overlaps with several other activities. Participation in events (46%) and visits to exhibitions (40%) belong to the range of opportunities that Brussels offers. Visits to health and/or fitness centres appear on the list of activities, albeit for a minority. Within the social networks of eurocrats there is frequent participation in evening activities, in particular viewing in museums or art galleries (nocturnes) and guided tours to places of cultural interest.

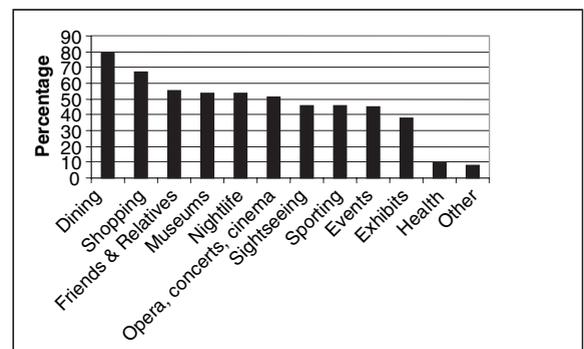


Figure 2. Leisure activities of eurocrats in Brussels. Source: Web survey, 2003.

Visitation and appreciation of the eurocrats

The respondents were well-informed about places of interest and events in Brussels. Over 30 attractions in Brussels (places of interest, museums and events) were selected on the basis of their visitation numbers, on the one

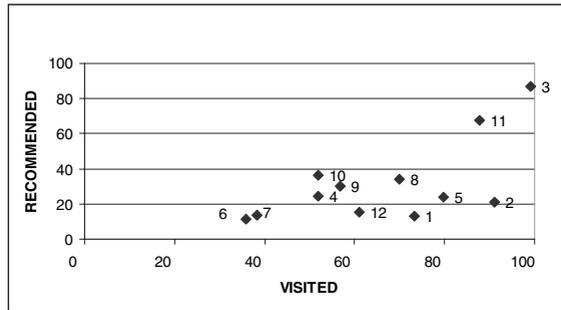


Figure 3. Eurocrats' appreciation of Brussels' places of interest: 1, Atomium; 2, Statue of Manneken Pis; 3, Grand Place; 4, The Munt Opera House; 5, Park of Brussels; 6, Law Courts; 7, Mini-Europe; 8, Saint-Michel Cathedral; 9, City Hall of Brussels; 10, Saint-Hubertus Gallery; 11, Sablon/antiquaries; 12, Botanical gardens. Source: Web survey, 2003.

hand, and the frequency of their inclusion in brochures, websites and other promotion material about Brussels, on the other. This list was used to illicit the respondents' actual visitation patterns and the extent to which they would recommend these experiences to others. The latter can be seen as an indication (albeit partial) of their appreciation of the city (Figure 3).

The historical main market square (Grand Place) and Sablon Square were most visited and highly recommended. St Hubertus Gallery (Figure 4) and the St Michaels' Cathedral also figure among Brussels' 'must-sees' in the traditional sightseeing tours. Their popularity is a function of their distinctive, in some cases unique, architectural settings. For some attractions there are notable discrepancies between recommendation and visitation. For instance, relatively high profile attractions such as the *Atomium* (Icon of the 1958 World Expo) or the famous little statue of *Manneken Pis* suggest some weak points in the tourist offer and/or marketing in terms of the way in which built and cultural heritage is commodified for visitors.



Figure 4. St Hubertus Gallery, Brussels. Source: authors.

Eurocrats' appreciation of the museums (Figure 5) and events were similarly explored (Figure 6). The Museum of Modern Art and the Horta Museum were the most visited and highly recommended. Four other museums were highly appreciated: the Musical Instruments Museum; the Royal Museum for Central Africa; the Museum of Ancient Art; and the National Comic Strip Centre. As van Aalst and Boogaarts (2002) argue, museums and cultural quarters are increasingly popular mechanisms

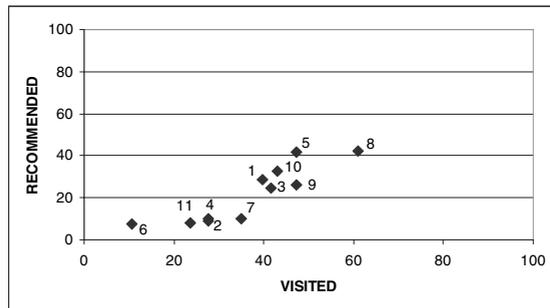


Figure 5. Eurocrats' appreciation of Brussels' museums. 1, Museum of Ancient Art; 2, Jubilee Park Museum; 3, National Comic Strip Centre; 4, Museum of Natural Sciences; 5, Horta Museum; 6, Erasmushuis; 7, Autoworld; 8, Museum of Modern Art; 9, Royal Museum of Central Africa; 10, Musical Instruments Museum; 11, Royal Museum of the Army and Military History. Source: Web survey, 2003.

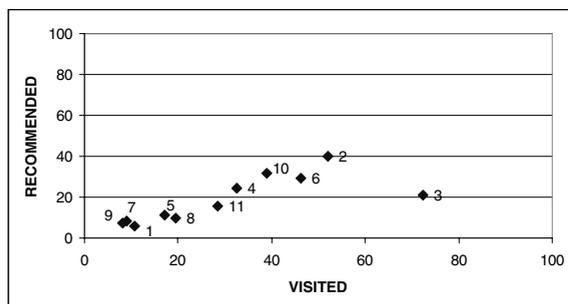


Figure 6. Eurocrats' appreciation of Brussels' events. 1, Film Festival; 2, Brussels Jazz Marathon; 3, Christmas Market; 4, Couleur Café Festival; 5, Europalia; 6, Flower Carpet; 7, Jacques Brel in Brussels 2003; 8, The Ommegang; 9, Queen Elizabeth Music Competition; 10, The Royal Greenhouses; 11, Visit to the Royal Palace. Source: Web survey, 2003.

by which cities may achieve their economic development aspirations. Notable here is, however, that five out of the 11 so-called 'top' museums were visited but rarely recommended. There is an extensive calendar of events, most of which are temporary in nature. The Christmas Market and the so-called 'Flower Carpet' (both held on the main market square) are examples of events that do attract large numbers of visitors, but which were not considered worthy of widespread recommendation to others as unique.

From these data it is clear that there was a limited array of attractions and events that eurocrats attend. This has important policy consequences in two, overlapping respects. First, 'Brussels, yours to discover!' may have been Brussels Tourist Office's slogan, but one of the city's major visitor groups concentrated on a relatively limited set of core attractions, and others were left relatively undiscovered. Second, there is evidence of a need to realign Brussels' image to address a marketing dysfunctionality. Several attractions that are afforded iconic status in promotional materials were not the most appreciated ones. Indeed, this is a real challenge for the many different agents involved in the tourism promotion of Brussels. Among eurocrats 'word of mouth' is by far the most important source of information about places to visit, things to do and see in Brussels (43%). The impact of brochures (13%), Internet (11%), newspapers (9%) and television (4%) is more diffuse. The most frequently mentioned guidebooks for Brussels were the *Michelin Guide* and *Lonely Planet*.

Images of Brussels

To understand more about how the city was appreciated by the eurocrats, their impressions were measured in a more holistic way, rather than by measuring the scores of individual assets or characteristics. Through a number of open questions spontaneous word associations with Brussels were registered (the same approach was also used to identify its most prominent landmarks and icons). This resulted in a list of 308 words, which were clustered in six categories: internationalism; positive adjectives; negative adjectives; food and drink; monuments and culture; and 'others' (Table 2).

Table 2. Connotations with Brussels according to the eurocrats. Source: Web survey, 2003

Connotations	Frequency	Percentage
Internationality	85	27.6
Europe	44	14.3
Multicultural/ diversity	22	7.1
International	19	6.2
Positive adjectives	65	21.1
Lively/busy	21	6.8
Friendly	11	3.6
Interesting	10	3.2
Green	8	2.6
Quirky	5	1.6
Zen/relaxing	3	1.0
Good quality of life	3	1.0
Beautiful	2	0.6
Small	2	0.6
Negative adjectives	54	17.5
Dirty/noisy	25	8.1
Rain	17	5.5
Cool/dark/grey	7	2.3
Unsafe	4	1.3
Food and drinks	35	11.4
Beer	14	4.5
Chocolate	7	2.3
Frites	4	1.3
Mussels	3	1.0
Food and drinks	7	2.3
Monuments/culture	21	6.8
Art nouveau	10	3.2
Main market square	7	2.3
Atomium	2	0.6
Statue of Manneken Pis	1	0.3
Jacques Brel event	1	0.3
Other	48	15.5
Total	308	100.0

Undeniably Brussels is seen in the first instance as a European, an international and multicultural capital city. Most of the positive and negative associations are hardly specific to Brussels but could apply generically to many Western European cities. Only food and drink evoked more specific images. Brussels' landmarks were not at the top of the list when the respondents were asked about their spontaneous associations. Our attempts to identify predominant icons and landmarks revealed that physical images of the city (70% of the answers) featured highly in the eurocrats' consciousnesses (Table 3). It is hardly surprising that the main market square was the top land-

Table 3. Ranking of the icons/landmarks in Brussels according to the eurocrats. Source: Web survey, 2003

Icons/Landmarks	Frequency	Percentage
European institutes	36	13.3
Monuments/culture	182	67.4
Main market square	72	26.7
Atomium	42	15.5
Statue of Manneken Pis	36	13.3
Art nouveau	9	3.3
Sablon/antiquaires	7	2.6
Cultural life	6	2.2
Architecture	4	1.5
Royal Palace	3	1.1
Cinquantenaire	3	1.1
Food and drinks	26	9.6
Other	26	9.6
Total	270	100.0

mark and icon of Brussels (27%), followed by the Atomium (16%) and the statue of *Manneken Pis* (13%). In contrast, and perhaps somewhat surprising given the respondents, the so-called 'European Quarter' (Figure 7), with a concentration of European administration, offices and institutions, and European meeting and conference infrastructure was mentioned as a landmark by 13%.

CHALLENGES FOR DESTINATION MANAGEMENT IN BRUSSELS

Eurocrats represent a major and growing constituency in post-enlargement Brussels. Clearly, these results provide a first, albeit indicative insight into their visitation patterns and appreciation/recommendation of attractions, museums and events. Notwithstanding, these data suggest that Brussels faces significant challenges in order to draw greater value from this group and to exploit its marketing value as key ambassadors for the city. These challenges appear to lie in identifying the strong and weak points of tourism in Brussels, including: the tourist product and the infrastructure (the hardware); the market, the target groups and the marketing (the software); and tourism organisation in Brussels (the orgware). The latter issue is rather complex and will be addressed only briefly here. A second stage of

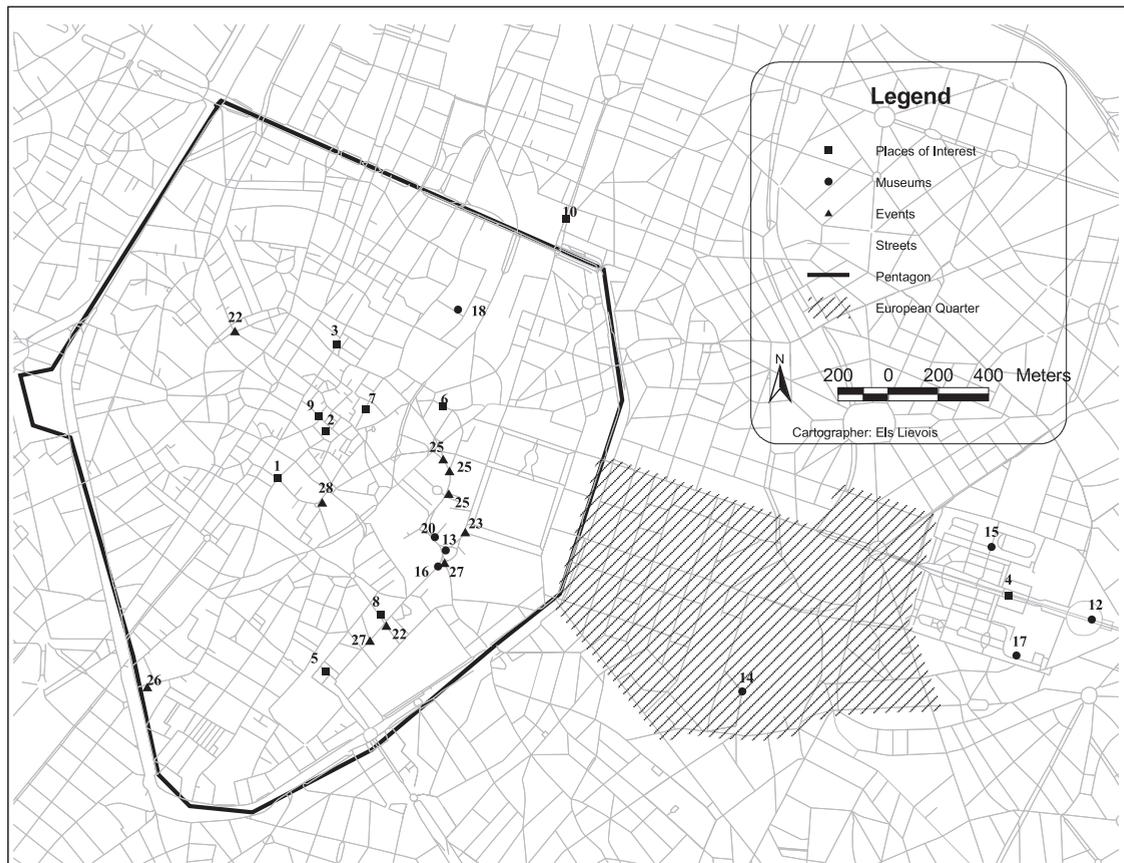


Figure 7. Location of top attractions and landmarks in Brussels: 1, Statue of Manneke Pis; 2, Grand Place; 3, The Munt Opera House; 4, Park of Brussels; 5, Law Courts; 6, Saint-Michel Cathedral; 7, Saint-Hubertus Gallery; 8, Sablon/Antiquaries; 9, City Hall of Brussels; 10, Botanical Gardens; 11, Hortamuseum; 12, Autoworld; 13, Museum of Modern Art; 14, Museum of Natural Sciences; 15, Royal Museum of Central Africa; 16, Museum of Ancient Art; 17, Jubilee Park Museum; 18, National Comic Strip Centre; 19, Erasmus House; 20, Musical Instruments Museum; 21, Film Festival; 22, Brussels Jazz Market; 23, Visit to the Royal Palace; 24, Couleur Café Festival; 25, Europolia; 26, The Ommegang; 27, Queen Elizabeth Competition; 28, Jacques Brel in Brussels 2003. Source: authors', based on data from Brussels Tourist Office 2003.

research, which involved further sector survey, interviews with key informants and desk research, addressed in more depth the nature of the challenges (Table 4) and possible future scenarios (Table 5).

Marketing challenges

The historical market square of Brussels with the famous city hall in a unique architectural setting is by any measure the core product for Brussels tourism, visited by almost all respondents and highly appreciated. This 'Grand Place' is also geographically at the core of the tourist zone in this historical city. In general,

architecture is a major tourism resource for Brussels; several themed trails through the city allow visitors to discover the richness and diversity of its cultural heritage (Naoi, 2004). In this respect, it was notable that several respondents mentioned Brussels' association with the art nouveau movement. Nevertheless, the number and strength of landmarks seem inadequate to compete in the international arena with other urban tourist destinations. Brussels lacks a top attraction such as the Louvre in Paris, the Tower of London, or the Guggenheim in Bilbao (cf. Plaza, 2000).

Brussels, as capital of the EU, currently holds a leading position among the top ten in

Table 4. Strengths and weaknesses of Brussels' tourism. Source: authors

Strengths	Issue	Weaknesses
The main market square = core of the tourist area	Tourist product	No outstanding landmarks
Architecture		No international top attraction
Conference centre		Limited benefits for tourism from the MICE market
Accessibility and international connections	Target groups	Inadequate infrastructure for major events/conferences
The total market volume		Low level of economy in the new EU member states
The market share of business tourism		Expectations of business tourist unknown
Multiculturality	Marketing	No 'European city centre'
Product reputation		Limited offer of city trips to Brussels from the new EU member states
Synergy between business and leisure tourism		Little awareness of and coherence in the tourist offer
Extensive promotion material		A negative image of Brussels' tourism
Location and number of visitor centres		Promotion material: no targeted website Different tourist promotion organisations create confusion

Table 5. Opportunities and critical success factors for Brussels' tourism. Source: authors

Opportunities	Issue	Critical succes factors
Nocturnes in the museums	Tourist product	Adequate financial resources for promotion and staff
An international tourism marker		
Increase participation score in tourist activities		
European Union enlargement	Target groups	Economic development in the new EU member states
A new and larger market	Marketing	Transport: rail and airlines
Innovation in product development		New packages by the tour operators
Consolidate a leading position in the MICE market		Proactive promotion strategies for the leisure tourist
		Focus on the Brussels experience: 'joie de vivre', 'art de vivre'

the international MICE market; only Paris is more important (according to the website of Union of International Associations, 2001). As a consequence, in the next decade Brussels is likely to remain a destination for business travel rather than for leisure travel, although the latter market is showing (limited) evidence of expanding. This has two implications. The first is to retain and preserve core markets and to ward off competition from other destinations for core products. For instance, in order to consolidate its position in the MICE market, Brussels requires considerable investment

towards the modernisation of its conference infrastructure. This is exacerbated by the threats posed by destinations in the AC10 such as Budapest and Prague, which already compete mainly in terms of price and quality of their hospitality, but which recently have attracted large volumes of investment. Second, a main challenge is to identify the opportunities to expand the business market with additional assets in terms of leisure and cultural activities and to strategically redesign the image of Brussels as a tourism place. Far too little is known about the agenda and expect-

tations of the business tourist. In addition, there is little tradition of collaboration or co-marketing between the MICE sector and the leisure tourism and cultural sector. The agenda for international conferences and meetings implies long-term advance planning. The possibility of intentionally adapting the schedule of conferences and meetings to that of important exhibitions or events is there, but requires close collaboration between the different organisations, the intermediaries and stakeholders.

Brussels benefits from its reputation as a capital of Europe and international media coverage is high. Its predominant image as an administrative and decision-making center, however, might even be a handicap in the promotion of this city as a place for tourism, culture and leisure. Thus, the real challenge lies in implementing a functional synergy between the business and the leisure market, and herein eurocrats represent an important conduit.

Recently, considerable investments have been made to improve the quality and the penetration of the promotional material on Brussels. The four Brussels tourist information centres are located strategically in the airport, the main railway station, on the main market square, and in the European Quarter to confront visitors at major city access points. Notwithstanding, the financial resources of the Brussels Tourism Organisation are limited and the competition from other major European urban destinations intense. Long-established city-break destinations such as London, Paris and Rome now exist in a congested market place with many other popular regional and provincial capitals such as Barcelona, Dublin and Amsterdam. Not only must Brussels compete with these cities, but also this market is set to become even more congested with cities in central and eastern Europe looking to capitalise on their entrance to this market (see Coles and Hall, 2005).

A more strategic marketing effort targeted at present segments, not least the eurocrats in Brussels, may be an effective step forward. Brussels has a wide and diversified tourist opportunity spectrum, but apparently this message is insufficiently communicated, especially among the eurocrat community and furthermore in their home markets. In particular,

eurocrats should be encouraged to widen their visitation patterns in time and space; through a more widespread exposure to the qualities of the city, word-of-mouth recommendation may be encouraged. In terms of limited budgets for marketing, this represents a relatively low-cost, cost-effective approach. Nevertheless, there are two limitations to this approach. First, informal marketing is difficult to regulate and to orchestrate precisely, with control. In this context, negative dispositions towards the city present a threat to positive marketing aspirations. Second, although the strength of 'word-of-mouth' is underestimated, to embrace informal marketing effectively requires further work because — in spite of this preliminary study — our understanding of eurocrats as visitors is still relatively limited.

Organisational challenges: a complex political web

A frequently mentioned criticism of current marketing efforts is the lack of transparency, cohesion and user-friendliness of the numerous websites promoting Brussels. This is emblematic of a wider problem of governing Brussels' tourism marketing. The complexity of the tourism orgware in Brussels is directly related to the political federalisation of Belgium and the fact that tourism policies for Brussels depend on a number of public agencies (Pearce, 1996). Brussels belongs to the marketing area of both the Flemish and the Walloon governments, in addition to specific Brussels' agencies involved in tourism development and marketing.

On behalf of the Flemish Government, 'Toerisme Vlaanderen' is the official administration for tourism in Flanders. From a marketing perspective, there is an increasing tendency to include Brussels as part of the Flemish tourist offer and/or as a gateway to Flanders (see CV-B,TV 2004). On the Walloon side (i.e. the French speaking part of Belgium), the Office de Promotion du Tourisme Wallonie — Bruxelles (OPT) is the official organisation for tourism development and promotion. Both the Flemish and the Walloon agencies include Brussels in their destination marketing strategies, and in fact the promotion of Brussels in the different European countries is in the

hands of both the Flemish and the French communities. In some cases there is a tourist office, which coordinates these tasks; in some countries this mission is carried out by the Belgian embassies and their cultural attachés. In none of the mission statements, however, is Brussels considered as a core product for tourism to Belgium.

This lack of transparency and emphasis on Brussels has led to the creation of the new 'Observatoire du Tourisme — Bruxelles' which is based on a close collaboration between 'Toerisme Vlaanderen', the 'Office de Promotion du Tourisme' and 'Brussels International'. The latter is a fusion between two former Brussels organisations: one for the leisure tourism market, and one specialised in the business market. To add further to the institutional thickness in the governance of tourism marketing, there are several professional organisations active in the promotion of tourism-related products and services in Brussels. The most effective agents in terms of joint marketing are to be found in the accommodation (Brussels hotels) and the museum sectors. Recently, this has been complemented by the activities of the Guides' Association. With all the apparent congestion and difficulties of co-ordination, the advantages of a more centralised and integrated approach to marketing are obvious, but the slow process of integration and collaboration across political and linguistic borders — in spite of the relatively small-scale of this one conurbation — is an indication of the long road ahead.

Opportunities and critical success factors

The responses to the survey and the suggestions given in interviews allow us to summarise the opportunities and, above all, to identify some critical issues that underlie any future progress (Table 5). Briefly put, the main opportunities surround encouraging eurocrats to attractions by recognising their visitation preferences; developing a new marquee attraction, perhaps with a European theme; and the identification and exploitation of key target markets. Although each may deliver enhanced returns, each also has notable consequences. More specifically, the appreciation of the eurocrats with museum nocturnes (evening gal-

leries) is apparently highly positive. This fashionable formula for discovering and consuming the cultural wealth of Brussels, however, tends to be elitist and implies additional costs for the museums (longer opening hours, security measures, additional personnel, etc.). The option of developing a new international tourist attraction, which can support the image of Brussels as the Capital of Europe, now has a high priority on the agenda of the Brussels authorities. A 'Europe museum' is one of the ambitions. This site should become a symbolic, functional and social focus for the European communities in Brussels. The chances of Brussels becoming a competitive, more popular leisure destination in the EU25 very much depend on the economic development in the new EU member states. This might imply a temporary demand for low-budget accommodation, for all-in arrangements with specialised guides (multilingual!) and economic transport to Brussels and in Brussels. At the time of writing, air connections with most of the new member states have low frequencies and high fares. The establishment of low-cost carriers to and from Brussels seems to be a critical success factor, but with its concomitant costs. Marketing efforts for the promotion of tourism to Belgium, Brussels, Flanders and the Walloon region will continue to be concentrated on the neighbouring countries as the main markets but some modest efforts will be targeted at the Polish and Czech market. Finally, the consolidation of Brussels as a leading destination in the MICE market will require capital investments taking into account that the 10 new EU member states are entering the arena as new competitors.

DISCUSSION AND CONCLUSIONS

Prior to May 2004 there was little attention to the probable dynamics of an enlarged market, to the potentials and the key players in the new competitive arena with 25 member states (WTO, 2004). This study has demonstrated that accession offers Brussels opportunities to increase the value of, and value accrued from, visitors as well as to reposition its image as a destination. Accession states may in time offer a boost to the leisure market in Brussels, but the benefits may be more modest and may not

be observed for some time to come. In the shorter term, Brussels will, like before, continue to depend on the business travel market. If Brussels tourism wants to capitalise on the market for business travellers, however, and benefit from its leading role as *de facto* EU capital and as a place for meetings and conferences, the redesign of the imaging of Brussels and of the communication strategies is a priority on the 'political' agenda. It is therefore vital for its tourism managers and governors to concentrate on strategies to create more awareness and interest in the cultural and leisure opportunities in Brussels. In this respect, the increasing number of eurocrats represents a key cohort as both consumers and ambassadors. The results of the web mail survey and interviews among eurocrats demonstrate the need to conduct further, more detailed research on this group, the limits to current consumption, gaps between visitation and recommendation, and the types of strategies to be developed to nurture significant outcomes from this group.

Indeed, this short paper has raised two further sets of issues for critical discussion. The first centres around the eurocrats themselves. Cultural heritage may be widely and routinely commodified to enhance the tourist offer of urban destinations (Page, 1995; van Aalst and Boogaarts, 2002; Selby, 2004). For culture to have a currency as a catalyst for developing volume and value in the tourism sector, however, its merits must be mediated among and between user groups. Although eurocrats may function as a key group of ambassadors, not all eurocrats have experience and communicate tourism opportunities in the same manner. In this case, eurocrats are important champions but the more precise ways in which they valorise and communicate attraction qualities and opportunities in the eurocrat community and at home must be uncovered. This raises the possibility of different types of ambassadorial behaviour and function, which, if brought into the policy arena, would add extra potency to the marketing efforts. If eurocrats are a (marketing) resource on which the city may capitalise, there remain questions, more specifically, of how best to manage the relationship between tourism marketeers and the eurocrat (ambassadors), as well as, more

widely, who will take the lead in developing innovative products and inspirational, integrated strategies? Product development and marketing is in fact currently the task of the Brussels Tourist Organisation but the links between culture, tourism and the EU suggest that a new platform for a more assertive city marketing/strategy may be one approach forward.

A second set of issues surrounds the evolving geography of the EU. The 'centre of gravity' of the EU is moving progressively eastwards. Before 2004, the position of Brussels as the capital of EU remained relatively unchallenged given the spatial juxtaposition of the member states and its accessibility by rail, air and road. Two features in particular — restructuring of air transportation between flag carriers and low-cost airlines, as well as the changing nature of accessibility for member states, especially the AC10 (and perhaps additional future members) — may suggest that Brussels's status is revisited. If this is the case, how strong will be the drive towards the decentralisation of decision-making and administrative centres? The more European institutions and activities are seen as instruments for regional development, the higher the pressure will be for relocation. The question then is what this will imply in terms of the restructuring of the market of urban tourism and for Brussels *per se*? Cultural diversity, which is by definition the richness of Europe and its history, will continue to direct the structure and the flows in present markets (Jansen-Verbeke and Spee, 1994; Dwyer and Kim, 2003). The competitive model, which is now undeniably taking over 'causes a crisis of adaptation on the supply side' (WTO, 2004, p. 38) For those 'inheriting' EU functions, perhaps in AC10 states, decentralisation in the future may create similar benefits and dilemmas associated with the eurocracy as those that Brussels has experienced for nearly half a century. Although the benefits may be attractive and high profile, it will be important for the potential beneficiaries to understand the disadvantages and costs. There will be further enlargements. Restructuring may necessitate adaptation but adaptation need not imply crisis if current transitions are used wisely to inform future events.

ACKNOWLEDGEMENTS

This project was carried out in close cooperation with the Brussels Tourist Office and was supported by Mr Piet Jonckers, Detached National Expert Tourism with the European Commission DG — Enterprise. The empirical research was carried out in 2002–2003 as a field work project with students in the Post Academic Course on Tourism Management at the University of Antwerp Management School. The usual caveats apply.

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