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A four-leafed clover for tourism in Bruges



Strategic vision memorandum tourism 2019-2024

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Abbreviations

DMO: Destination Marketing Organisation
 DMMO: Destination Management Marketing Organisation
 GDSI: Global Destination Sustainability Index
 KPI: Key Performance Indicator
 CSS: Customer Satisfaction Score
 NPS: Net Promoter Score
 TSI: Tourist Sustainability Indicator

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Introduction

The world is changing fast, and so is tourism. Tourism in Bruges is due for a new story that anticipates the permanent driving forces behind the successive changes. A story with more than just an economic underpinning. A story based on a strategy where we expressly choose not for 'more' but rather for 'better', thus also for other than the usual KPI's. A positive story that contributes to the well-being of our residents, visitors and entrepreneurs.

We have a number of good examples. *Wonderful Copenhagen* was the first European DMO which, with a new strategy, refreshingly announced *The end of tourism as we know it*. Based on the transformative power of tourism, in *Travels to Tomorrow* the Tourist Office of Flanders is forging the link to a new image of the future. In the meantime, DMO's are preparing themselves for a future in which their role will be different from that of today. You can read about what is changing in *Tomorrow Today*, the manifesto of European Cities Marketing, the association of 120 DMO's from the most important European city destinations, including Bruges.

In Bruges, the effect of all these changes has its very own dynamic, so we aren't simply doing a copy-paste of what other cities are doing; instead, we are writing our own story. Brief and powerful, custom-tailored to the city, with ambitious goals and clear choices, in line with the city's policy programme.

The renewed vision sets forth the city's ambitions with regard to tourism. It offers a foothold for our employees, partners and stakeholders who are involved in implementing the tourism policy. We went through a participatory process together with them. They are our ambassadors to support and help realise the new story, in the interest of our city, Bruges.



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A snapshot of tourism in Bruges

The economic balance sheet

In 2018, 8.3 million visitors were counted via mobile data in the historical city centre of Bruges. That is one million more than in 2017, and almost two million more than in 2016.

Not all visitors are tourists. Amongst them are 1.2 million day recreationists; these are residents from the 17 surrounding municipalities who visit the city in order to shop and enjoy culture.

The largest group of visitors – nearly 6 million – is constituted by day trippers. According to our definition, day trippers are visitors who come to Bruges from outside of the 17 surrounding municipalities for a recreational purpose and stay here for at least 1 hour. Day tourism in Bruges grew by 13% in one year, and by 36% over two years. A day tripper in Bruges spends an average of € 74.50. Almost half of the day trippers are present in the city between 1 and 3 hours. Day tourism is above all domestic tourism, but the share of foreign visitors is increasing every year. A rapidly-expanding segment within day tourism are the so-called excursionists; this is a specific group that travels to Bruges from a place of stay other than their own residence. Out of the 44% of foreign day trippers, 1 out of 3 is an excursionist. Over the past two years, the number of international excursionists grew by 147% and now amounts to 10% of all visitors coming to Bruges.

In 2018, 1.1 million visitors stayed for one or several nights in the city centre. The overnight tourists accounted altogether for a total of 1.8 million overnight stays. Overnight tourism in the city centre grew in one year by 8% and over two years by 26%. An overnight tourist spends € 145 per person per night. 82% of the overnight tourists are of international origin and 92% visit Bruges for a recreational purpose.

The total turnover of the day and overnight tourism in the centre of Bruges is estimated at 703 million euros for 2018. Around 6,000 people earn their living in tourism. Bruges' visitor economy is the city's third most important economic sector.

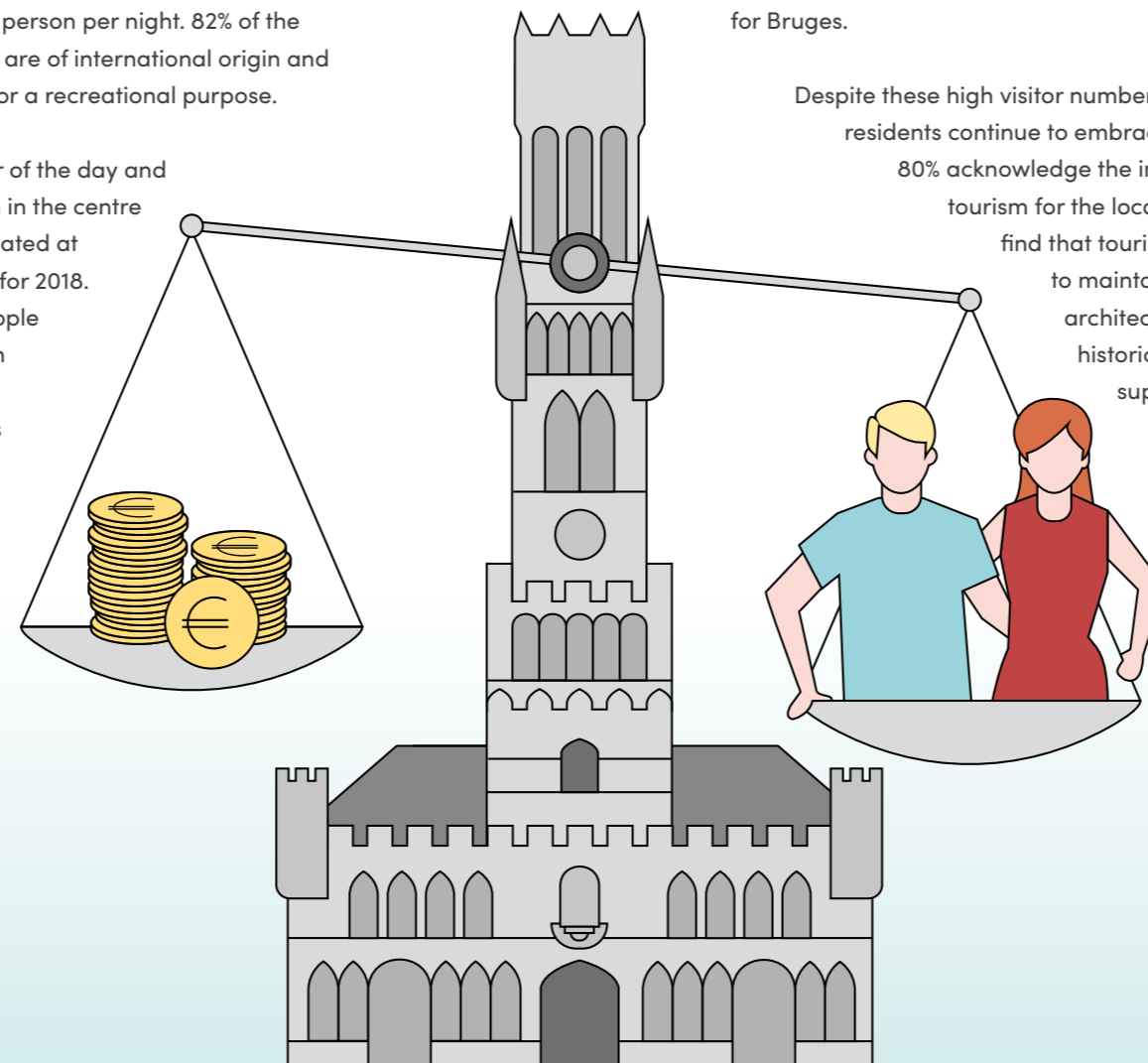
The social balance sheet

Almost 20,000 residents live in the historical city centre. The number of visitors per 100 residents per day, the so-called crowd index, amounted to 120/100 in 2018. On 32 days the crowd index came to more than 210/100, the equivalent of the Procession of the Holy Blood, a top day for Bruges.

Despite these high visitor numbers, Bruges residents continue to embrace tourism: 80% acknowledge the importance of tourism for the local economy; 75% find that tourism contributes to maintaining the city's architectural and historical heritage; 76% support tourism and no fewer than 90% believe Bruges must remain an

important tourist destination. Yet Bruges residents are not blind to the potential disadvantages of tourism: 47% fear that affordable living is coming under pressure; 1 in 4 find that tourists can cause a good deal of inconvenience, above all when it comes to traffic. Half of the residents feel constricted in their comfort due to the presence of tourists, and for this reason 66% sometimes avoid the city centre. 1/3rd experience the increasing number of tourists as a threat to liveability but, despite this, the vast majority still feel at home in the city. 70% of the residents find that the advantages of tourism more than outweigh the disadvantages.

Despite their high numbers, the city continues to score well amongst visitors, also and above all in terms of friendliness and hospitality. Overnight tourists experience the city as calm, relaxing and cool; day trippers sometimes also experience the city as very "touristic". With 8.6/10 amongst the overnight tourists and 8.7/10 amongst the day trippers, Bruges nevertheless obtains the highest general satisfaction scores of all of the art cities. But 36% of the day trippers and 29% of the overnight tourists experience certain places as being too busy. Bruges is perceived by visitors as expensive. With 7.3/10 in terms of price-quality, we do less well than the other art cities.



8.3 million
visitors

6 million
day trippers

day tripper
spends
€ 74.5
per person

1.1 million
overnight tourists

overnight tourist
spends
€ 145
per person
per night

€ 703
million
total turnover

6,000 jobs
in tourism

crowd index
120/100

76%
of Bruges
residents
support tourism

1/3
of the residents
experience the
growth of tourism
as a threat to
liveability

1/4
of the residents
find that tourists
can cause
inconvenience
(above all in
traffic)

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Tourism in Bruges in a changing world

Ground-breaking tourism

Today, thanks to globalisation, travel is more accessible than ever. This evolution is particularly visible in Bruges. Never before have more visitors come to the city, and they come from all over the world. Within the 4.4 km² of the 'egg' we now count up to three times more visitors than residents during the absolute peak moments. Above all in holiday periods and on the weekends we see them in the same places and at the same times, more and more often for only a couple of hours. Amongst residents, entrepreneurs and visitors there is a growing understanding that city tourism is reaching a limit in terms of carrying capacity. Bruges was far ahead of its time in taking measures to keep the impact of tourism manageable; in the interest of its residents and in the understanding that what is good for residents is also good for visitors. Therefore Bruges is today not at all comparable to the circle of European cities that suffer under a constant excessive pressure of tourism. We wish to keep things that way with smart management, and we can make adjustments as necessary.

The economic paradox

Although the visitor economy in Bruges is doing well in general, it is also vulnerable. Geopolitical, economic and monetary stability is essential for any international destination that is largely dependent on the leisure segment. External events lead to capriciousness in the visitor statistics and nervousness on the part of those who live from tourism. A striving for volumes has always characterised the tourist economy, as has the related risk that a one-sided offer oriented towards mass tourism can develop. That is not different in Bruges. As a result, the city becomes less attractive for residents and for visitors who are looking for depth and diversity. Such

visitors are smaller in number, but they have more time to discover and appreciate the city. And that makes them more interesting, in the macroeconomic sense of the term. It is imperative to make well-balanced choices so as to sustainably anchor the visitor economy.

The digital transformation

Few sectors underwent such a rapid transformation as tourism over the past decade. Driven by new technologies and platforms, a new experience economy has been able to develop, in which connectivity and interrelatedness between people play a central role. Today, exchanging and sharing (authentic) experiences takes place within the group with which one identifies on the basis of one's own interests. Moreover, the meaning of travelling is increasingly defined by non-touristic entrepreneurs. The tourist marketplace has shifted to a new environment, which puts the model behind the classic business operations under pressure. In order to remain relevant for our visitors, it is important to understand the mechanism behind the digital transformation and to develop our local tourism policy around it.





A four-leafed clover for tourism in Bruges

Strategic goals

Bruges is unique, a rarity like a four-leafed clover. Ever since the Middle Ages a four-leafed clover has been regarded as a lucky charm. Comparable to what tourism has - so far - been for the city. The rapidly-changing world heralds the end of an age, thus also in tourism. Henceforth the question is no longer what the city can do for tourism, but what tourism can mean for the city. The framework for the new vision of tourism is the city's policy programme with a link to four of the seventeen sustainable development goals of the United Nations. We retain the four-leafed clover, but the message is changing.

This is the new central goal:

“Tourism in Bruges supports the desired dynamic of the entire city which is balanced, connected, attractive and enterprising. Tourism in Bruges contributes sustainably to the well-being of residents, entrepreneurs and visitors.”

We transposed the central goal into four strategic ones.

STRATEGIC GOAL 1

Tourism contributes to the Balanced city

We accompany touristic development in the city. We wish to control its impact. We work in a more focused manner on segments and target groups that are interesting and relevant because of their intrinsic qualities, not merely because of the volumes they generate. We define the success of tourism differently: along with the economic added value, account is also taken of the social added value and the added value for the environment. In this way we keep the support base for tourism high.

STRATEGIC GOAL 2

Tourism contributes to the Connected city

A city that connects people is a city that captivates and inspires. Visitors are our guests, temporary residents of the city. We encourage contact between the temporary residents and the permanent ones. We connect with our visitors in every phase of the visitor cycle. We work to eliminate physical and other thresholds. We write the success story that is tourism in Bruges in collaboration and co-creation with all placemakers: the residents, visitors and entrepreneurs.

STRATEGIC GOAL 3

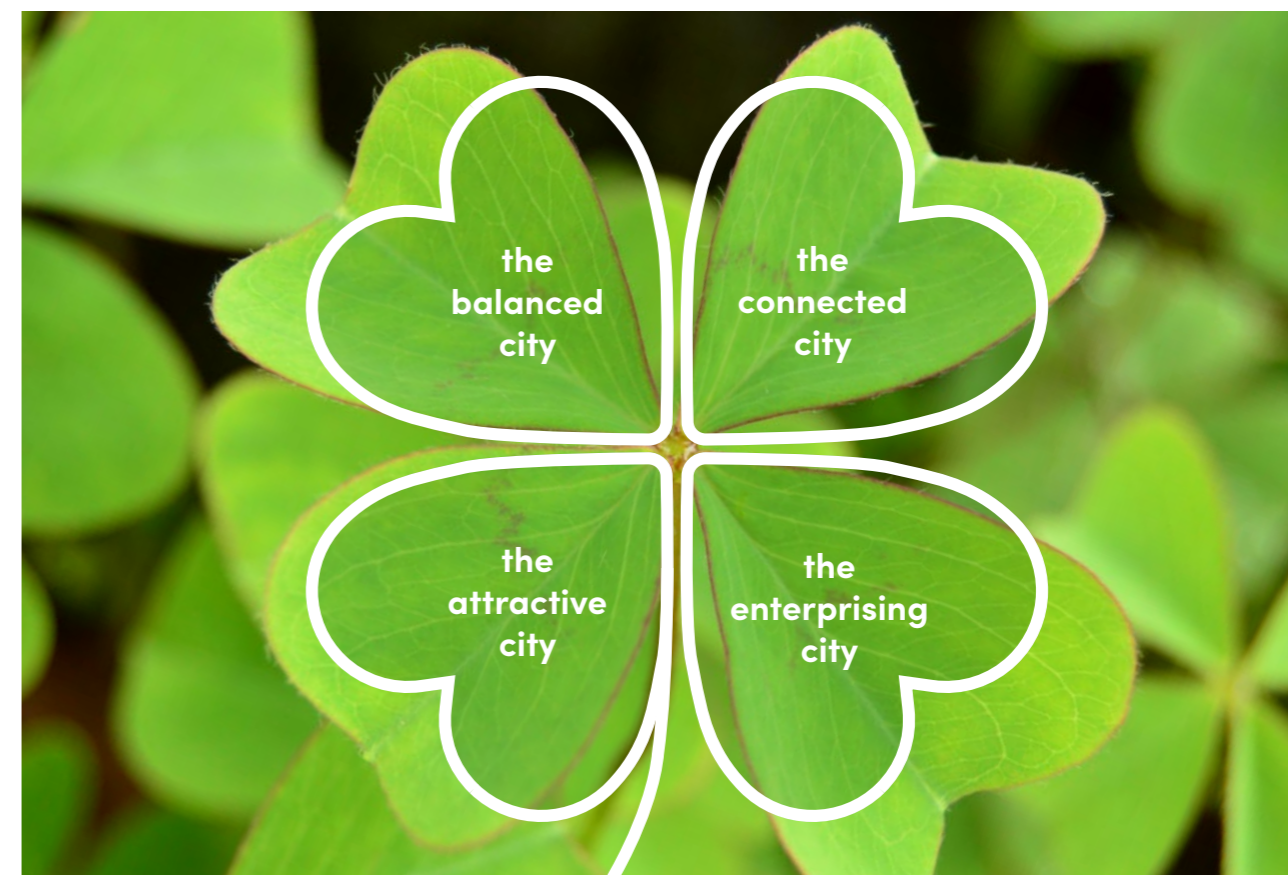
Tourism contributes to the Attractive city

Bruges is a strong international brand. With what it has to offer in cultural and historical terms, the city speaks to visitors from all over the world. With an open view on this world and with respect for history and tradition, we contribute to a top-quality experiential climate in line with the intended city positioning. There is room for innovation and experimentation here. In this way we put Bruges on the map as a contemporary, surprising cultural destination and we remain top of mind for the visitors we wish to attract.

STRATEGIC GOAL 4

Tourism contributes to the Enterprising city

Tourism in Bruges ensures prosperity. We create a favourable investment climate in which entrepreneurship can sustainably develop itself. There is no place for short-term gain here. We are reducing the impact of external, unexpected events on the tourist economy. The non-entrepreneur as well may be enterprising and benefit from tourism – provided that there is a level playing field for everyone.





A four-leafed clover for tourism in Bruges

Strategic choices

We use the four-leafed clover to express our ambitions for tourism in Bruges. To fulfil these ambitions, our four-leafed clover needs to be rooted in a rich and fertile soil. The substrate that we prepare is a mixture of seven supplements that we call strategic choices.

STRATEGIC CHOICE 1

Overnight tourism is a priority

Everyone is welcome in Bruges, but no specific actions focussed on day tourism will be undertaken. The growth of excursionism is being curbed, while multi-day, residential tourism is being encouraged. Within the recreational stay segment we are focussing proactively on the individual visitor, while the group market is only being facilitated. Within the business segment the focus is placed on attracting residential congresses, meetings and incentives.

STRATEGIC CHOICE 2

Smart growth

We are aiming for qualitative growth in the visitor public (in both day and overnight tourism): we are striving for a prolongation of the length of stay with a view to higher spending, and a higher visitor satisfaction in the hope of increasing potential repeat visits and the inclination to recommend. We are striving for quantitative growth of the residential tourism in the quieter periods (mid-week and the low-season months of January, February, March).

STRATEGIC CHOICE 3

LEISURE and MICE

Inherent to the first and second strategic choices, MICE and LEISURE are given equal weight in practice.

STRATEGIC CHOICE 4

Target groups take precedence over target markets

We are working on target groups that are of strategic importance for the city. In the MICE segment these are companies and organisations that have a link with the economic areas in which the city and region are strong. In the LEISURE segment this is the (cultural) added value-seeker. The intended target groups are present in all geographical markets. Activity in a geographical market is determined by the current and potential share of the intended target group. The choice for the target group always takes precedence over the choice for a market.



STRATEGIC CHOICE 5

Spread and concentration

No touristic offer is stimulated outside the core touristic zone that is stressful for liveability in these residential neighbourhoods. However, outside the core zone a wider offer of unique and authentic experiences can be developed, whether temporary or permanent, for visitors who belong to the segments and the target groups that are being actively worked on. We are thus evolving from a tourist concentration to a differentiation model. This model allows the tourist area, where relevant and desirable, to be expanded in a limited and controlled way to other urban quarters inside and outside the city centre. The offer to cities and regions that, in terms of experience, are an extension of Bruges is also being further developed.

STRATEGIC CHOICE 6

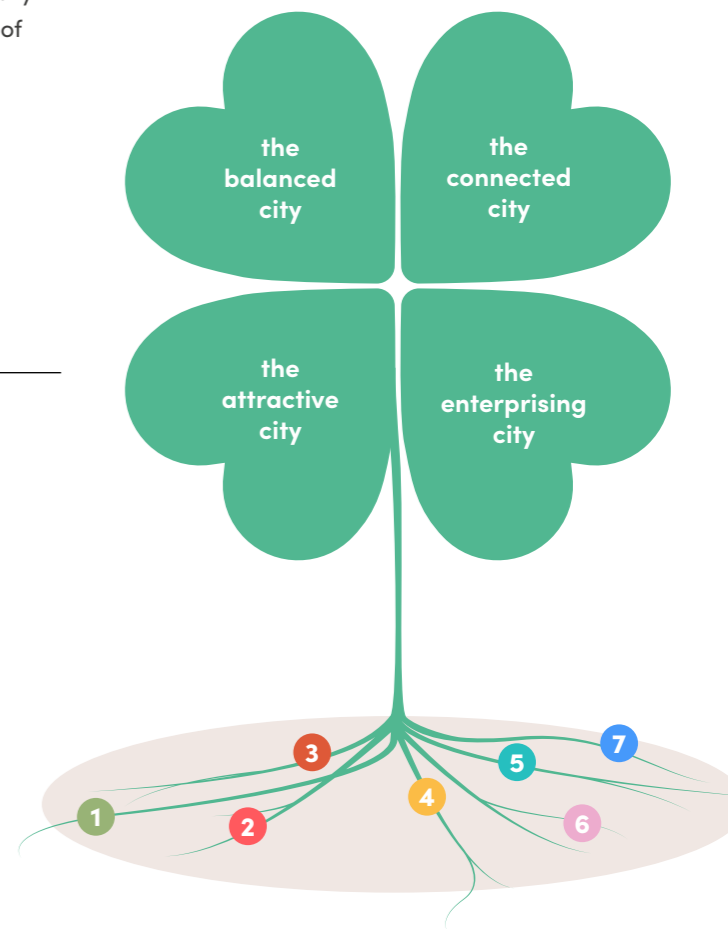
Maintenance of the hotel and holiday accommodations stop

The selective criteria for new hotels or extensions of existing ones in the city centre remain in effect. The holiday accommodations stop in the city centre is maintained.

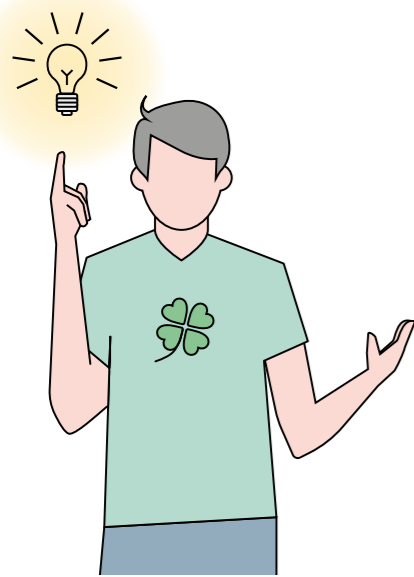
STRATEGIC CHOICE 7

Emphasis on management with directed marketing approach

We are making a fresh start with the tourism cluster. Visit Bruges is evolving into a knowledge-driven management organisation with a directed marketing approach.



Action plan 2019 – 2024



We are operationalising our strategic goals and choices to seven worksites with priority actions. These worksites are linked to the city's multi-year plan 2019 – 2024 and thus are also decisive for the deployment of people and resources.

Action 4
We are expanding the holiday accommodation stop to areas in the sub-municipalities where the residential function is threatened.

Action 5
Day tourism in groups outside the core touristic zone is not being facilitated.

Action 6
Agreements are being made with the players involved to spread out the visit of cruise tourists in time and space.

Action 7
The burdensome forms of tourism contribute financially for using the city.

Action 8
The excesses of tourism that lead to nuisances or disrupt the image of the city are being addressed and constrained.

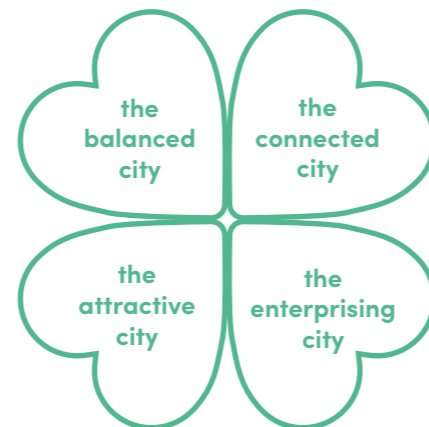
Action 9
An action plan is being drawn up to curb the unilateral RECA and shopping offer aimed at tourists and to encourage diversity/authenticity.



WORKSITE 2 We are implementing the tourism activities with our partners on the basis of a participatory model.

Action 10
We are creating a broad support base by involving the sector representatives in the monitoring and implementation of the tourism action plans.

Action 11
We are meeting the information needs and requirements of the sector via an efficient sector communication.



WORKSITE 1 We are accompanying the touristic development by keeping its impact manageable.

Action 1
We are carefully monitoring the touristic pressure on the housing market.

Action 2
We are maintaining the selective criteria for new hotels or extensions of existing hotels in the city centre (the selective hotel stop).

Action 3
We are developing a city-wide vision of lodging development, taking into account the city's carrying capacity.

Action 17
We are optimising our own online platforms in order to create, manage and share relevant content.

Action 18
We are conversing in real time with our visitors via our own online channels and via new interactive applications.

Action 19
We are present with relevant content on the most important external platforms and review sites which are frequently consulted by visitors.



WORKSITE 4 Bruges as a destination is powerfully positioned in the market with the right story, addressed to the right target group, via the right channel at the right time.

Action 20
Each year an action plan is drawn up and implemented for MICE and LEISURE focussing on the strategic choices and target groups that the city is addressing in priority.

Action 21
Agreements are being concluded with partners for implementation of the action plan.

Action 12
We are activating the existing concept of master classes and workshops in order to share and exchange knowledge and experiences with the sector network.

Action 13
The touristic database is being developed into a full-fledged sector portal where all relevant sector info can be consulted in a single place and used in own applications.

Action 14
With the other art cities we are setting up projects of common interest in the cooperative non-profit association vzw Kunststeden Vlaanderen.



WORKSITE 3 We connect with our visitors, both physically and virtually, at places and times where they are looking for inspiration and information or are prepared to share them.

Action 15
A programme is being set up in order to renew the tourist reception offices and equip them to match the contemporary needs and requirements of the visitors.

Action 16
A programme is being set up to communicate with the visitors at other interesting places in the city.

Action 22
As part of the action plan, Bruges is visually and informatively present in the country's most important airports.

Action 23
Each year a separate tourism action plan is drawn up and implemented for the sub-municipalities belonging to the macro-destinations Coast and Bruges Hinterland.



WORKSITE 5 With targeted actions we are contributing to a top-quality experiential climate that supports the city's positioning.

Action 24
We are studying how, via smart technologies, we can increase visitor comfort and better manage visitor pressure.

Action 25
Together with our stakeholders we are setting up a programme to qualitatively upgrade the first-line reception.

Action 26
We are developing and promoting a unique and exclusive offer of in-depth experiences aimed at the individual (cultural) added value-seeker.

Action 27
We are reorienting the Christmas market towards an innovative concept that fits within a broader winter experience.



WORKSITE 6

We are working on important preconditions for sustainably anchoring touristic entrepreneurship.

Action 28

Via targeted impulses, partners are being encouraged to work on inclusive accessibility and reduce their impact on the environment.

Action 29

The new Convention Centre is the instrument for transforming Bruges into a MICE destination.

Action 30

We are submitting our candidacies in an oriented and proactive manner in order to attract events and congresses that support the desired image of the city.

Action 31

The City of Bruges is facilitating the transport that is being organised by the private sector from train stations, airports and seaports to Bruges.

Action 32

The City of Bruges is supporting the development of new routes via West Flemish airports and seaports.



WORKSITE 7

Via monitoring, research and knowledge exchange we are reinforcing the actions that are being proposed to achieve the policy goals.

Action 33

We are measuring visitor volumes and are receiving new data that we convert into usable information in order to forecast visitor flows and behaviour.

Action 34

We are participating in studies to understand how residents perceive the touristic development.

Action 35

We are monitoring and investigating how Bruges is perceived by visitors as a destination.

Action 36

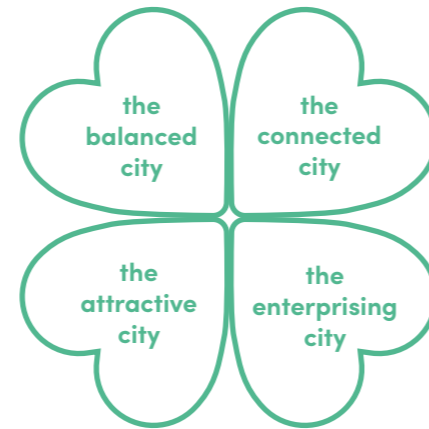
We are participating in research to better understand the profile of our visitors.

Action 37

We are measuring the effectiveness of our marketing actions.

Action 38

Visit Bruges participates in international workshops and networking events in order to keep abreast of the most important trends and developments in tourism.



Action 39

We buy relevant studies and research in order to support our functioning.

Action 40

The evolution of authorised and unauthorised tourist accommodations is constantly monitored.



Where do we want to stand with tourism in Bruges in 2024?

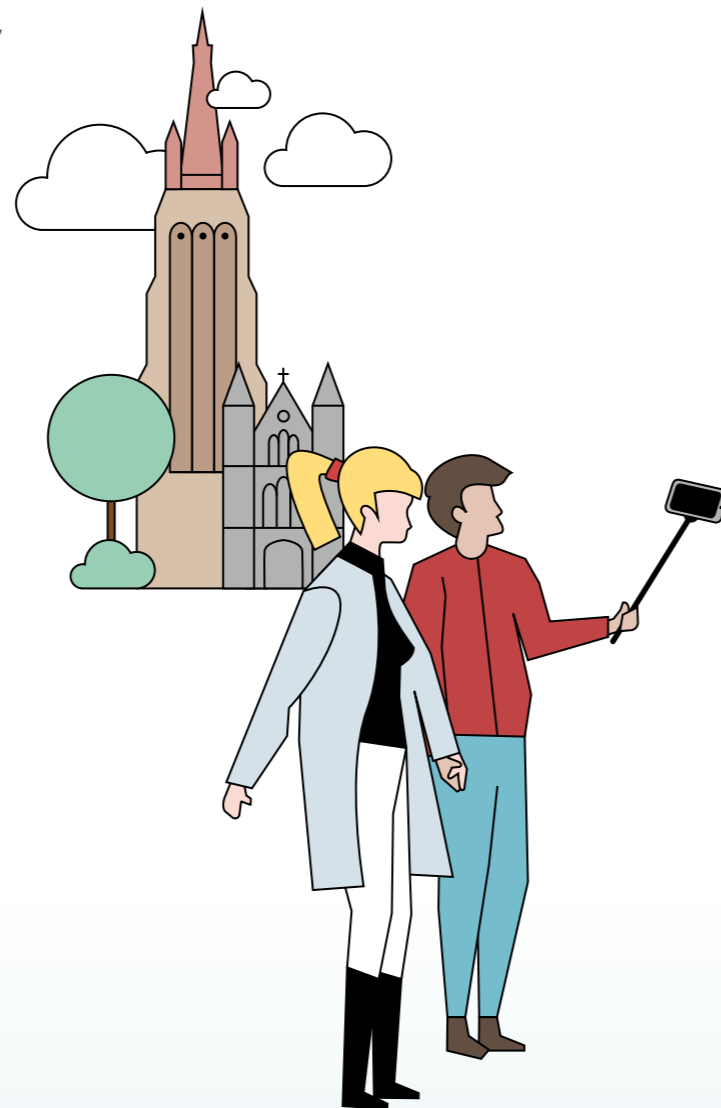
We are refining our ambitions. We are intentionally not speaking of Key Performance Indicators (KPI's) but rather about Tourist Sustainability Indicators (TSI's). On the basis of five indicators we specify where we, in implementation of our renewed vision, wish to be with our tourism within five years.

In 2024...

... Bruges scores higher than the average of the European benchmark cities that participated in the **Global Destination Sustainability Index (GDSI)**. The GDSI is linked to the sustainability goals of the United Nations. It evaluates the performances of destinations on 73 sustainability indicators that are relevant for tourist destinations. For an increasing number of companies and organisations, the score of cities in the GDSI is a decisive criterion for whether or not they wish to hold their meeting or conference there.

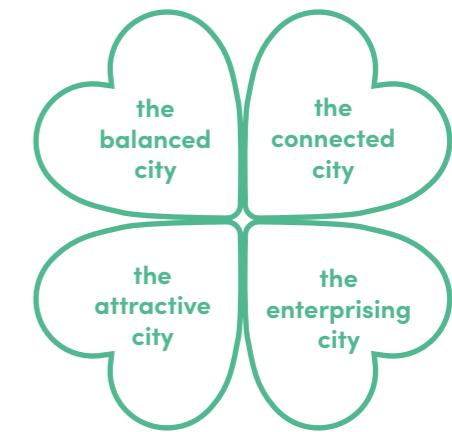
... **The support base for tourism** amongst Bruges residents is at least 76%; this is the percentage that expressed their support for tourism in the most recent Residents Survey (at the end of 2016) conducted by the Tourist Office of Flanders and Visit Bruges. The residents survey is being conducted once again in 2019 and will be repeated periodically.

... **The Net Promoter Score (NPS)** for Bruges as a destination is positive. The NPS expresses the annual score on the question of how likely it is that visitors will recommend Bruges as a destination to family and friends. Via artificial intelligence we know why or why not. Measuring the NPS provides us with valuable information about customer loyalty (in the tourism context, this equates to potential repeat visits).



... **The length of stay** of visitors has risen, both in the day tourism segment and in the overnight tourism segment. We measure the length of stay via mobile data.

... The customers of Visit Bruges give an outstanding score with regard to the provision of services. **The customer satisfaction score (CSS)** indicates how satisfied our customers are about the services provided by Visit Bruges. We map out the underlying reasons via artificial intelligence. Measuring the CSS yields valuable information on customer satisfaction in both a B2B and B2C context.



Mission and organisation



Logically, our ambitions are also reflected in the mission and organisation of Visit Bruges.

Mission

Our mission reads as follows:

On the basis of the city's core values, we contribute sustainably to the desired urban dynamic which is balanced, connected, attractive and enterprising. In this way we contribute to the well-being of our placemakers (residents, entrepreneurs and visitors).

With Visit Bruges:

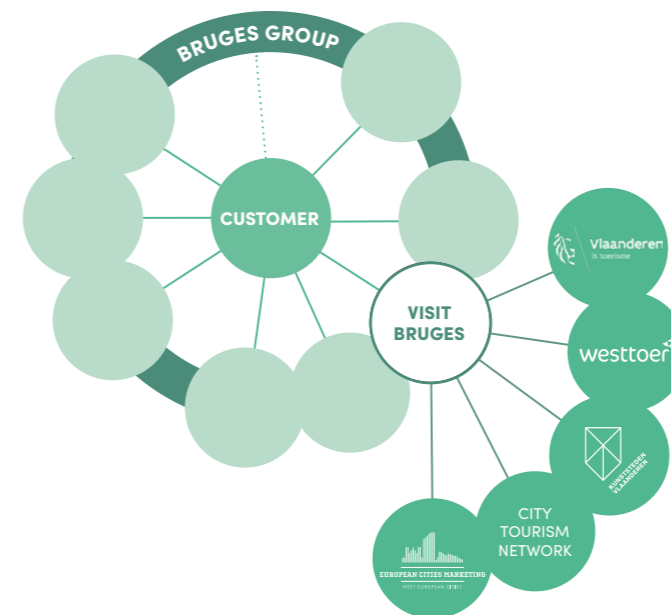
-  We are supporting a top-quality experiential climate.
-  We are powerfully positioning the international destination of Bruges in the market via the right story, addressed to the right target group, via the right channel at the right time.
-  We connect with our visitors, both physically and virtually, at places and times where they are looking for inspiration and information or are prepared to share them.
-  We are accompanying the touristic development by keeping its impact manageable.
-  We are contributing to making the visitor economy more sustainable.



Organisation

The tourism cluster is something of an outsider within the Bruges Group, because the activity is primarily oriented towards a different customer than the residents – and moreover, in an international context. We therefore continue to direct the tourism activity from a separate cluster under the name Visit Bruges.

In order to be able to achieve the proposed goals, Visit Bruges is evolving from a classic tourist department to a knowledge-driven management organisation with a directed marketing approach, comparable to the fresh start that DMO's have already taken or are in the process of taking in other European destinations. The core tasks thus continue to lie at the intersection of marketing & sales and reception of the public, but priority is also placed on managing and developing the international destination of Bruges.



Visit Bruges works transversally, in the first instance within the Bruges Group (tourism has interfaces with many other policy areas) but also and above all on a city-transcending level in harmonisation with provincial and regional tourism authorities and other urban

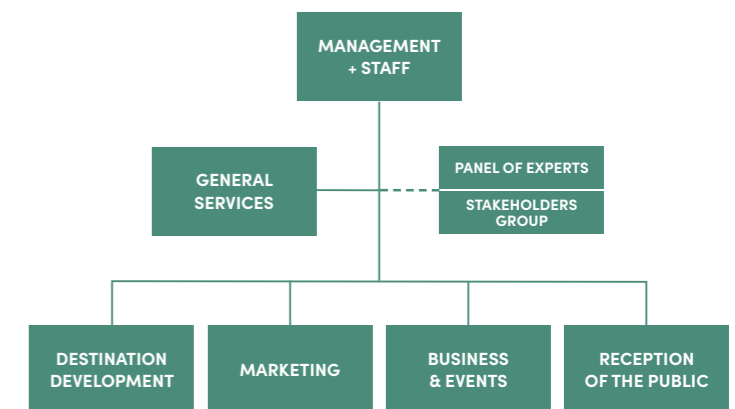
destinations in our European network. This generates not only fresh insights but also tangible advantages.

Participation and innovation mustn't be hollow concepts, so we anchor the structural sector consultation in our team architecture and we get outside experts involved in our activity.

Within the tourism cluster we work in the most efficient and effective way possible. Therefore, the non-profit association 'vzw Meeting in Brugge' is being integrated into the urban organisation as a newly set up 'business & events' department within Visit Bruges. The tourism cluster no longer has any separate departments and thus henceforth coincides fully with the DMO Visit Bruges. The digital activity is the binding agent between the teams and a necessary evolution in order to remain relevant for our customers, partners and stakeholders.

The specific dynamic and purpose of the cluster justifies a powerful team composed of employees with specific profiles. Like a well-functioning bicycle chain, every link is important. Visit Bruges has excellent employees with the necessary qualifications, but in order to be able to turn at the desired gear ratio, a number of targeted reinforcements are necessary.

Team architecture:



Inspired by...

Where did we draw our inspiration from?

A wide range of data, studies and research constitutes the substructure of this strategic vision memorandum. Indispensable sources include: the residents and art cities surveys that we periodically conduct with the Tourist Office of Flanders and the other art cities, current trend and benchmark reports as well as our own visitor information that we acquire via mobile data. We peeked over the walls of Bruges to find good international practical examples within our European cities network. In WES Studie en Onderzoek we found a partner who supported us and did the necessary checks for methodological accuracy.

In any change process, it is important to have your stakeholders at your side. Creating a support base is an intensive, long-term effort, but definitely worthwhile in the end. We initiated our consultation and feedback process with a masterclass to which we invited international experts. We brought the sector representatives and municipal departments together in a feedback group that substantively and editorially accompanied every step in the drafting of the strategic vision memorandum. We organised in-depth workshops with our stakeholders network. In one way or another, no fewer than 47 organisations and municipal departments and a large number of committed employees, colleagues



and partners were involved in this co-creative process. We wish to expressly thank them for their inspiring and positive feedback.

The new strategic vision on tourism begins from a profound respect for the city and its residents. We find it important to also give the residents a forum in the renewed tourism policy. This is a challenge that we will take along as a working point during the upcoming period.

Do you have your own proposals or suggestions on how to realise our vision of the future? Share them with us: klavertjevier-toerisme@brugge.be



"In terms of tourism, Flanders is taking the first steps in a major transition that will move us away from an 'experience' economy and towards a 'meaning' economy. The following question plays a central role: how can tourism, the perspective of the visitor, help to ensure that a healthy balance exists within communities between what the residents, the visitors and the entrepreneurs find important? In Bruges, the jewel in Flanders' touristic crown, this question is posed with particular clarity, and perhaps even greater urgency. Bruges' new vision of tourism reflects maturity and intelligence, and the city will find a willing partner for its efforts in Flanders Tourism."

Peter De Wilde, CEO of Flanders Tourism

