



Luxembourg for Tourism

Market profile

BELGIUM

2022



Economic indicators & General Travel Demand

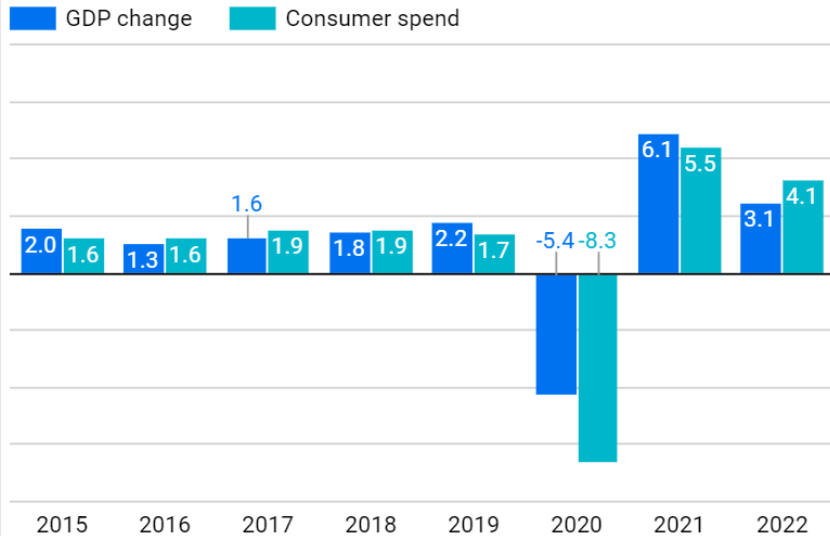
Economic indicators – General travel demand



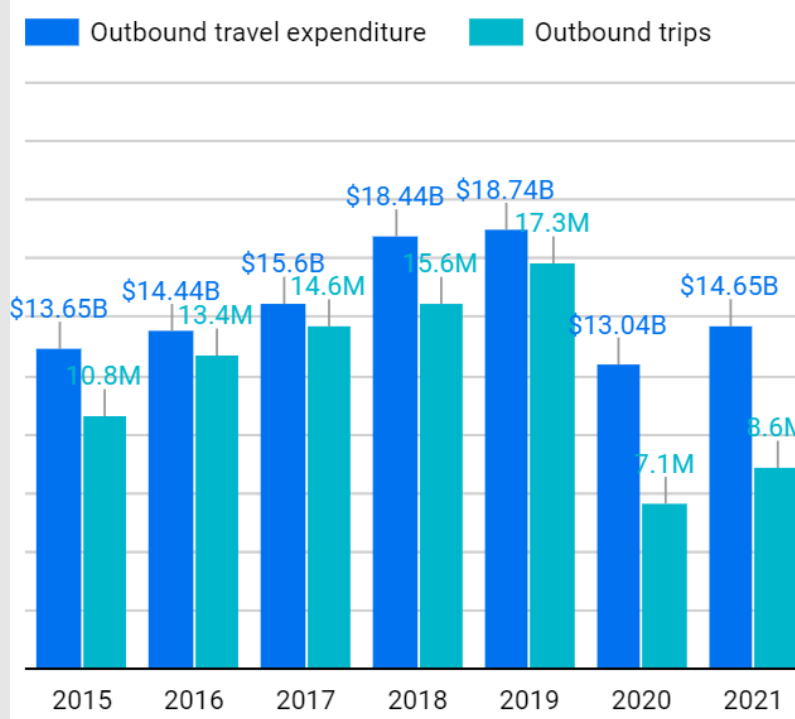
Economy & population

GDP (PPP) per capita **\$52,755** Unemployment (%) **5.9** Population (mn) **11.6** Inflation (%) **9.6**

GDP and Consumer spending, % annual change



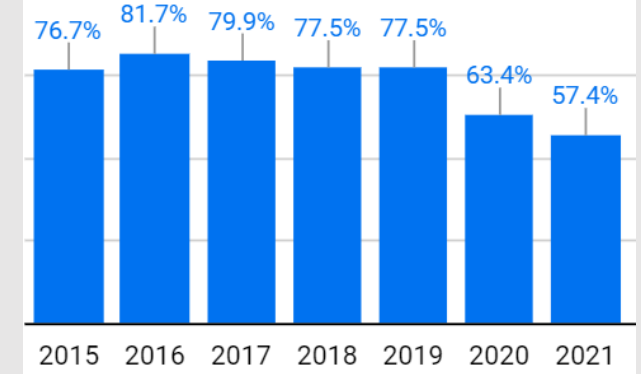
Outbound trips and travel expenditure



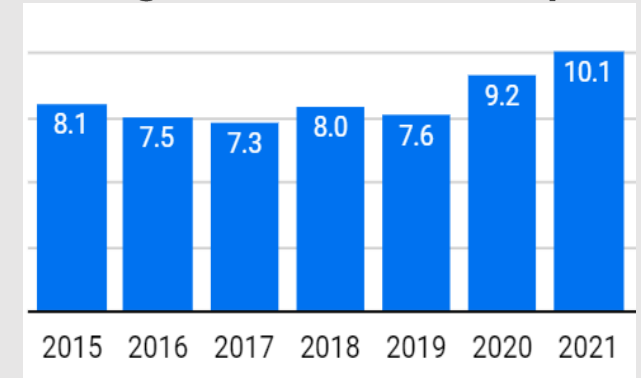
Average spend per outbound trip (2019)
1.082 \$

Outbound travel intensity
1.51 trips per inhabitant (2019)

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of leisure, % all outbound trips (2019)
91.3%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2022



**Nights,
paid accommodation, 2022**



+29% (vs. 2021)
-25% (vs. 2019)

**Arrivals,
paid accommodation, 2022**



+33% (vs. 2021)
-12% (vs. 2019)

**Average length of stay,
paid accommodation, 2022**



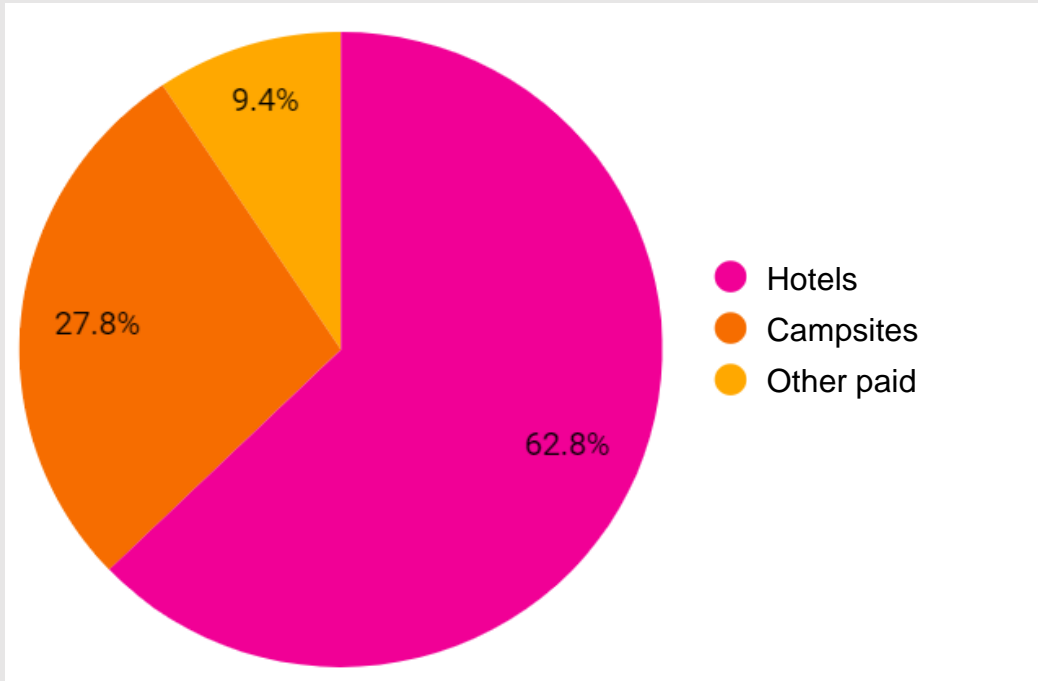
-0.06 days (vs. 2021)
-0.34 days (vs. 2019)

Nights & arrivals in paid accommodation

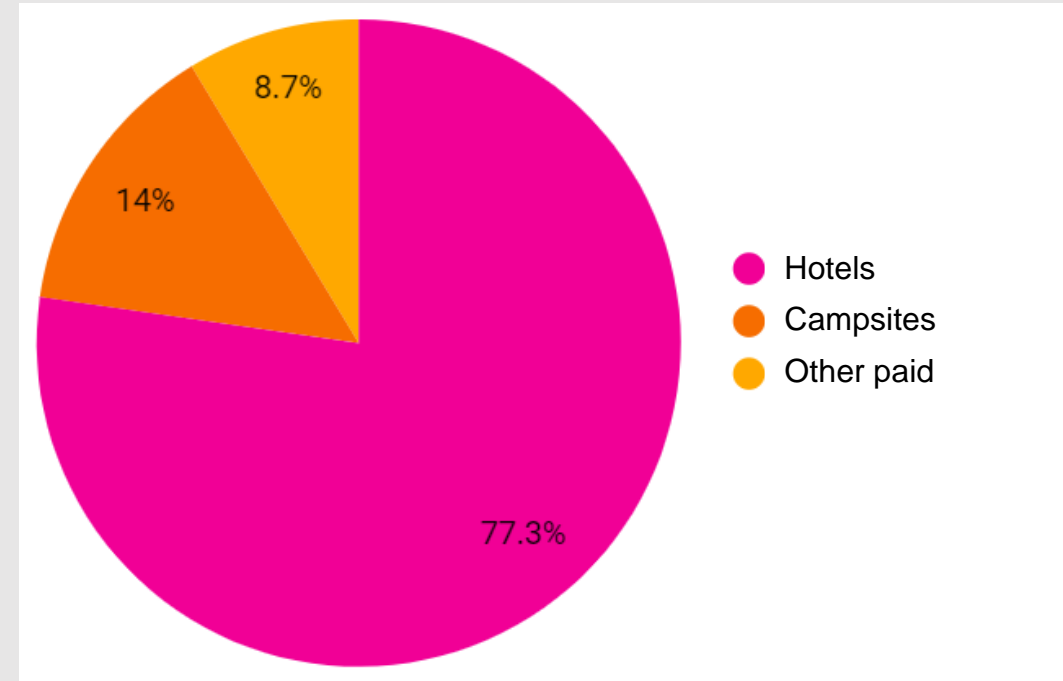
Type of accommodation, 2022



**Nights,
paid accommodation**



**Arrivals,
paid accommodation**



Hotels	231.857	-17% (vs. 2019)
Campsites	102.788	-42% (vs. 2019)
Other paid	34.536	-2% (vs. 2019)

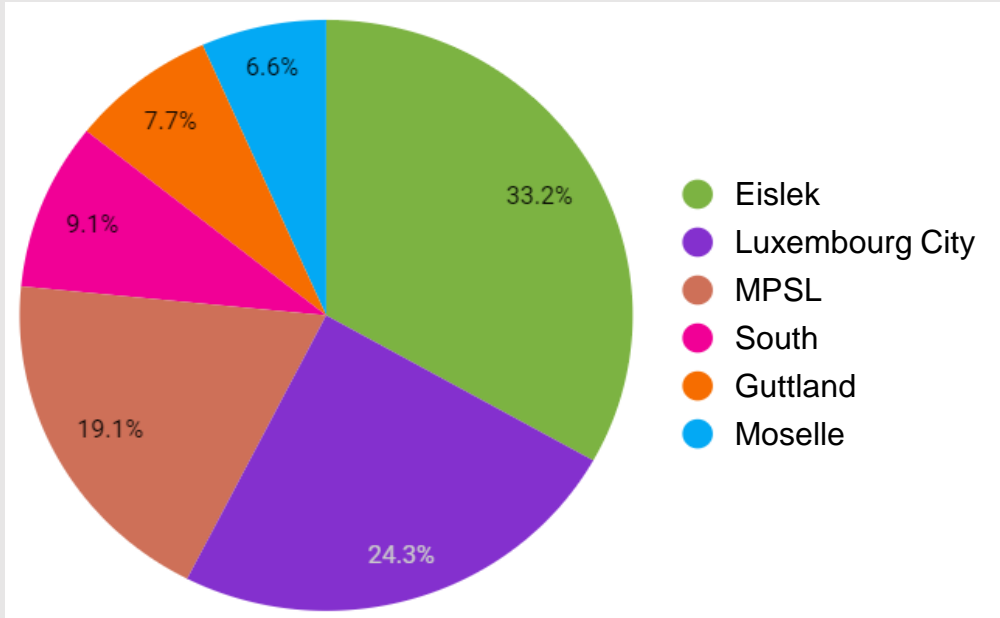
Hotels	140.043	-18% (vs. 2019)
Campsites	25.462	+19% (vs. 2019)
Other paid	15.731	+5% (vs. 2019)

Nights & arrivals in paid accommodation

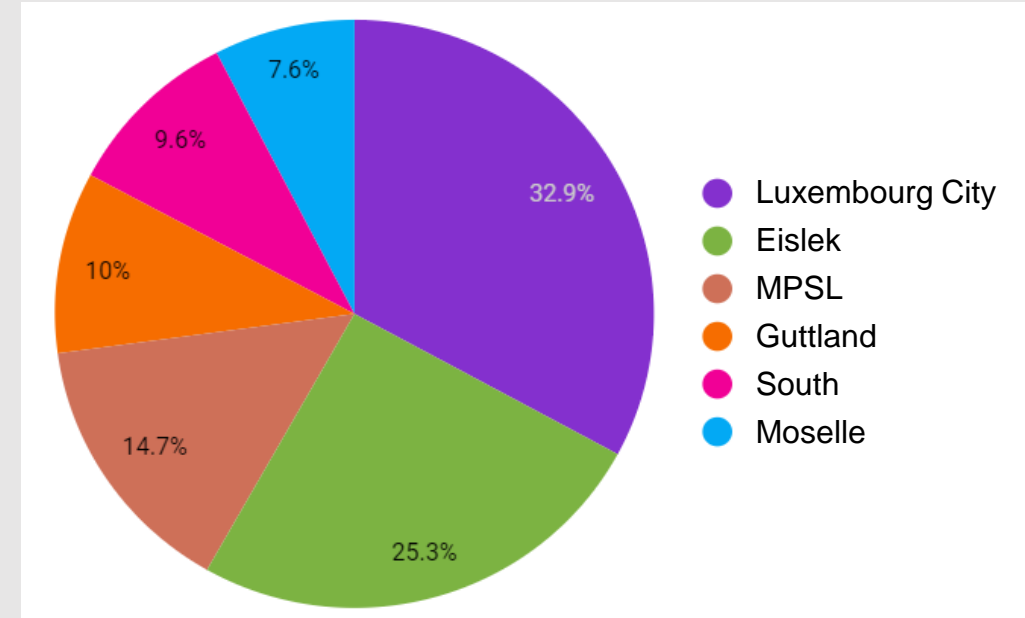
Regions, 2022



**Nights,
paid accommodation**



**Arrivals,
paid accommodation**



Eislek	122.461	-42% (vs. 2019)
Luxembourg City	89.779	-23% (vs. 2019)
MPSL	70.433	-5% (vs. 2019)
South	33.778	+33% (vs. 2019)
Guttland	28.341	+1% (vs. 2019)
Moselle	24.389	-36% (vs. 2019)

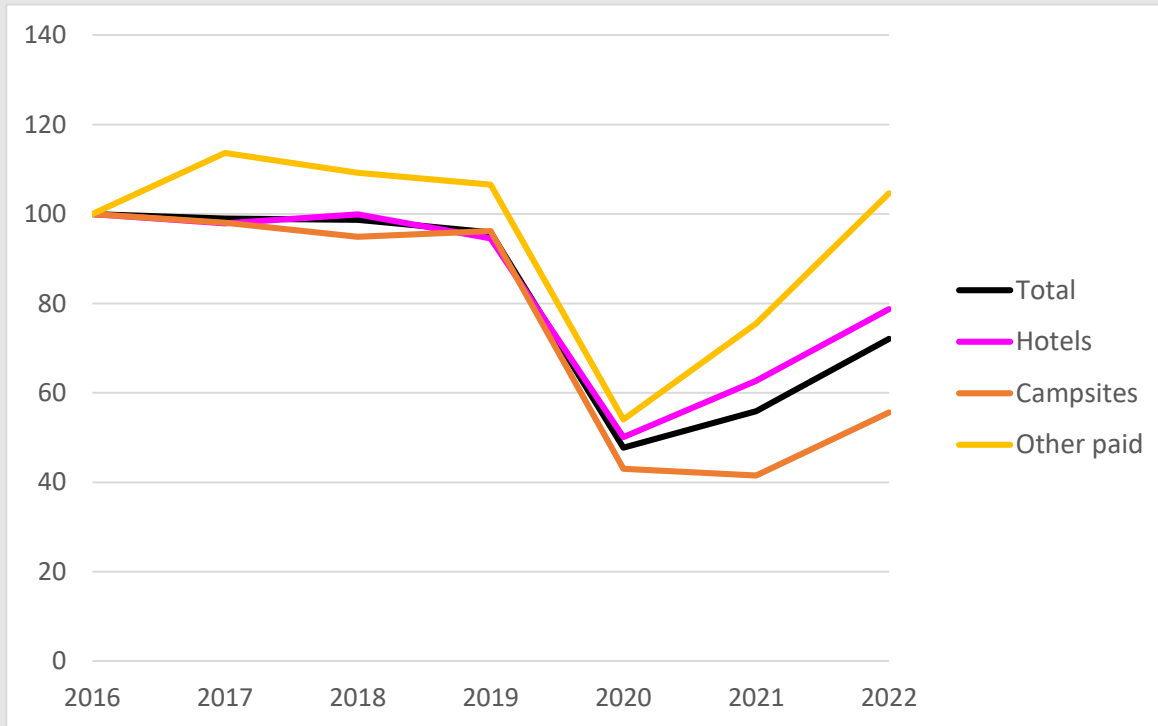
Luxembourg City	59.655	-23% (vs. 2019)
Eislek	45.812	-13% (vs. 2019)
MPSL	26.573	+10% (vs. 2019)
Guttland	18.064	-2% (vs. 2019)
South	17.327	+22% (vs. 2019)
Moselle	13.805	-28% (vs. 2019)

Nights in paid accommodation

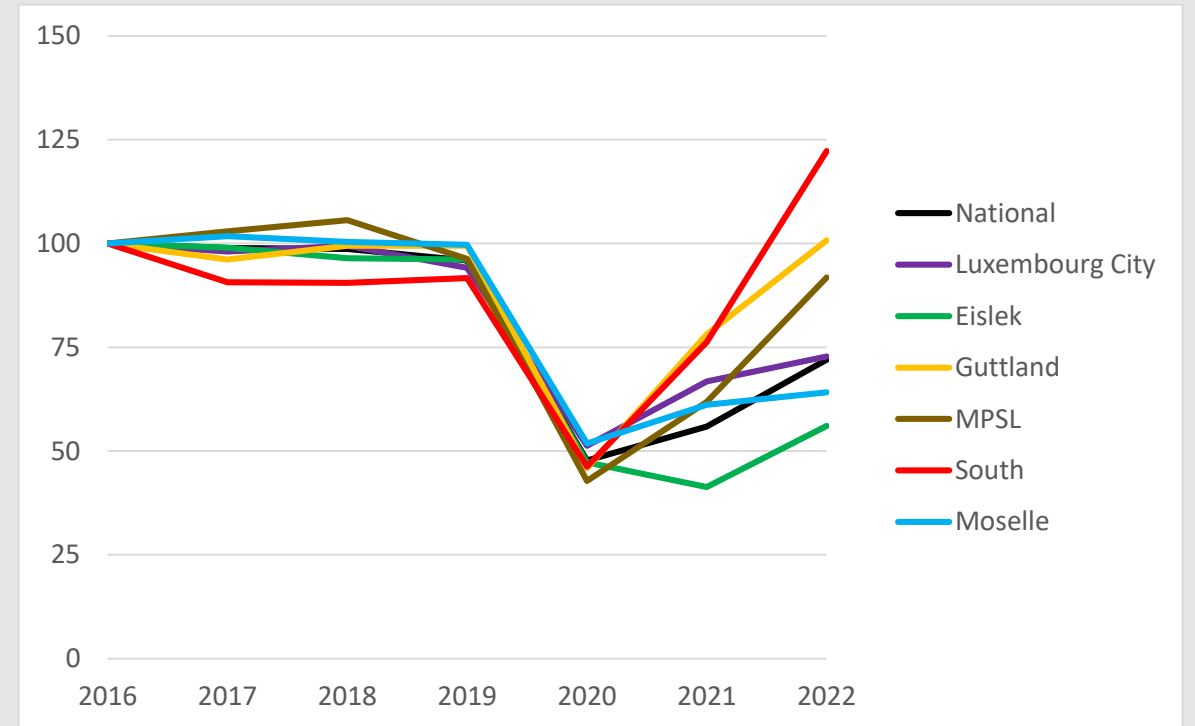
Total, Type of accommodation & Regions : Trends 2016-2022



2016 = Index 100



2016 = Index 100

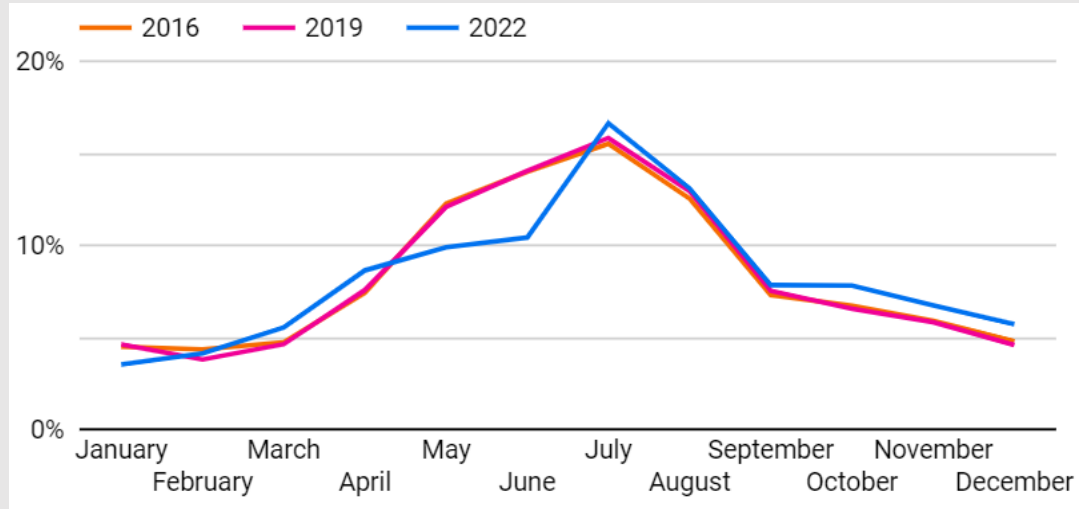


Nights in paid accommodation

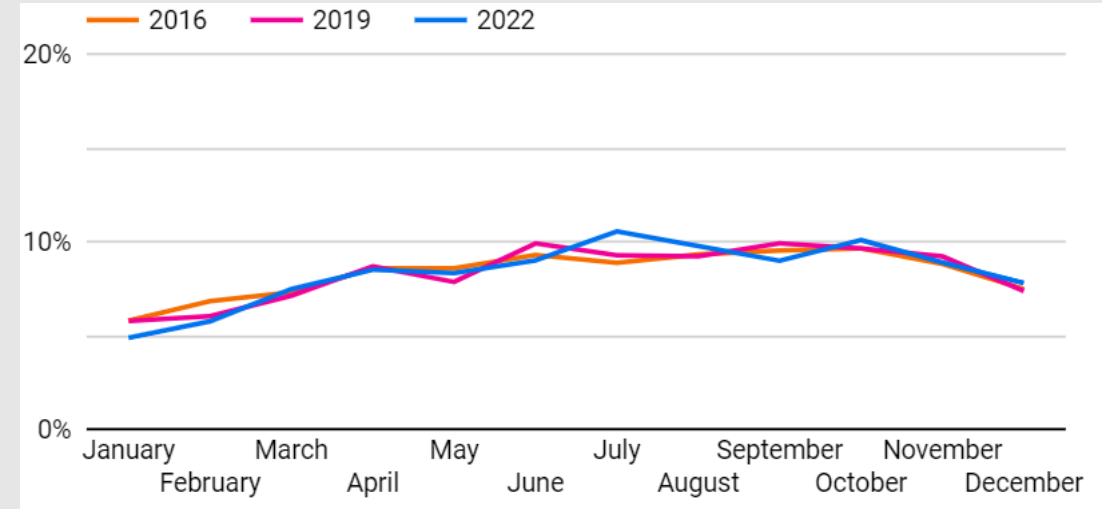
Seasonality



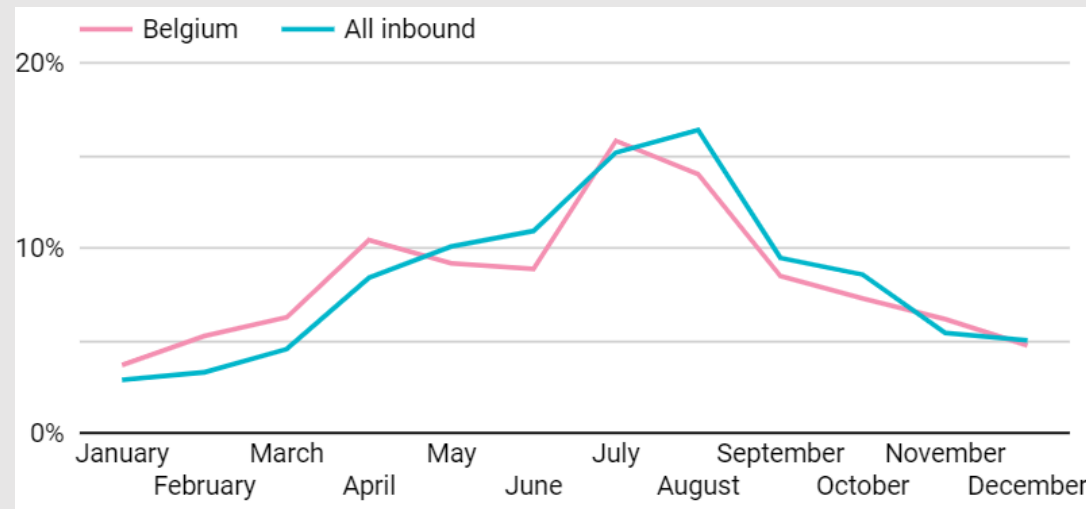
Belgian nights, all paid accommodation



Belgian nights, hotels



Nights, all paid accommodation, 2022



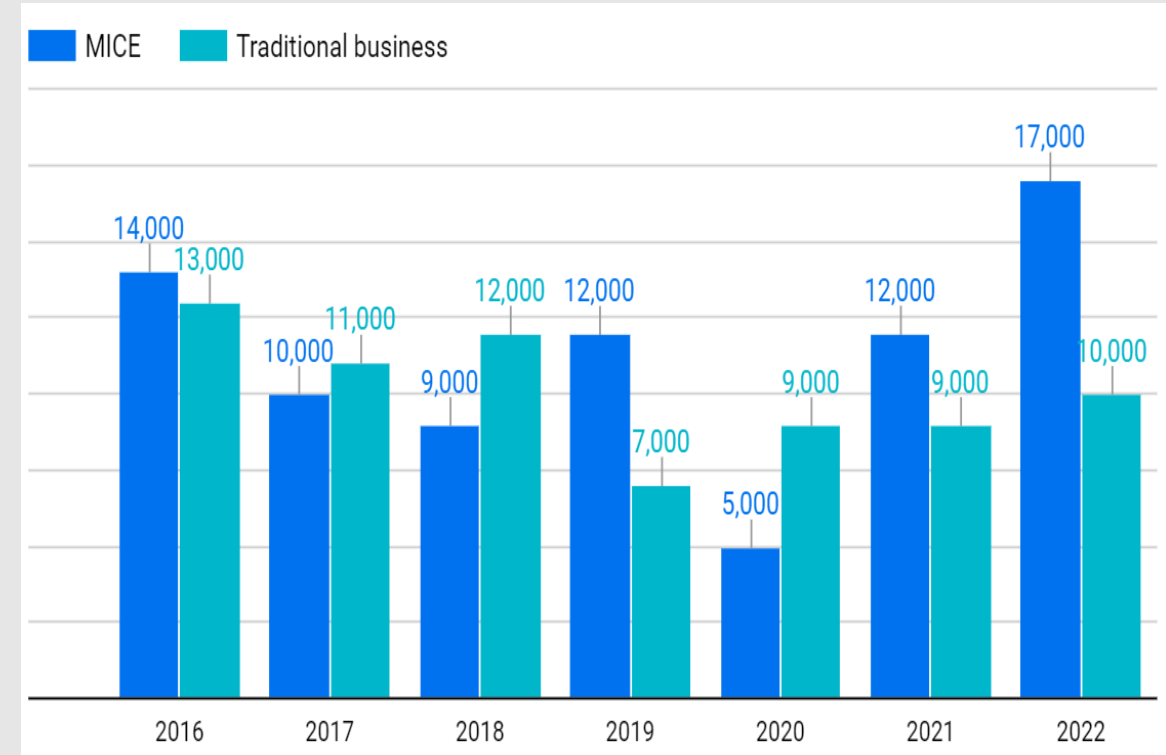
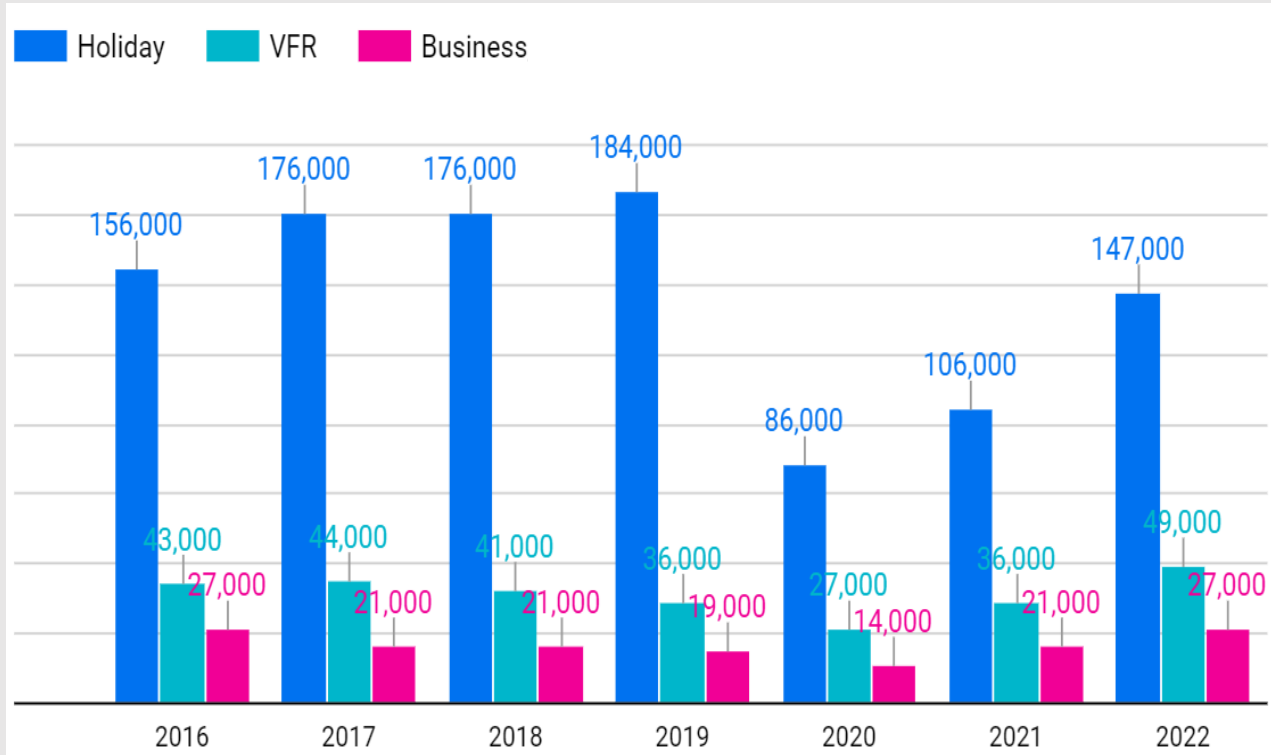


Characteristics of Belgian inbound trips to Luxembourg

Belgian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

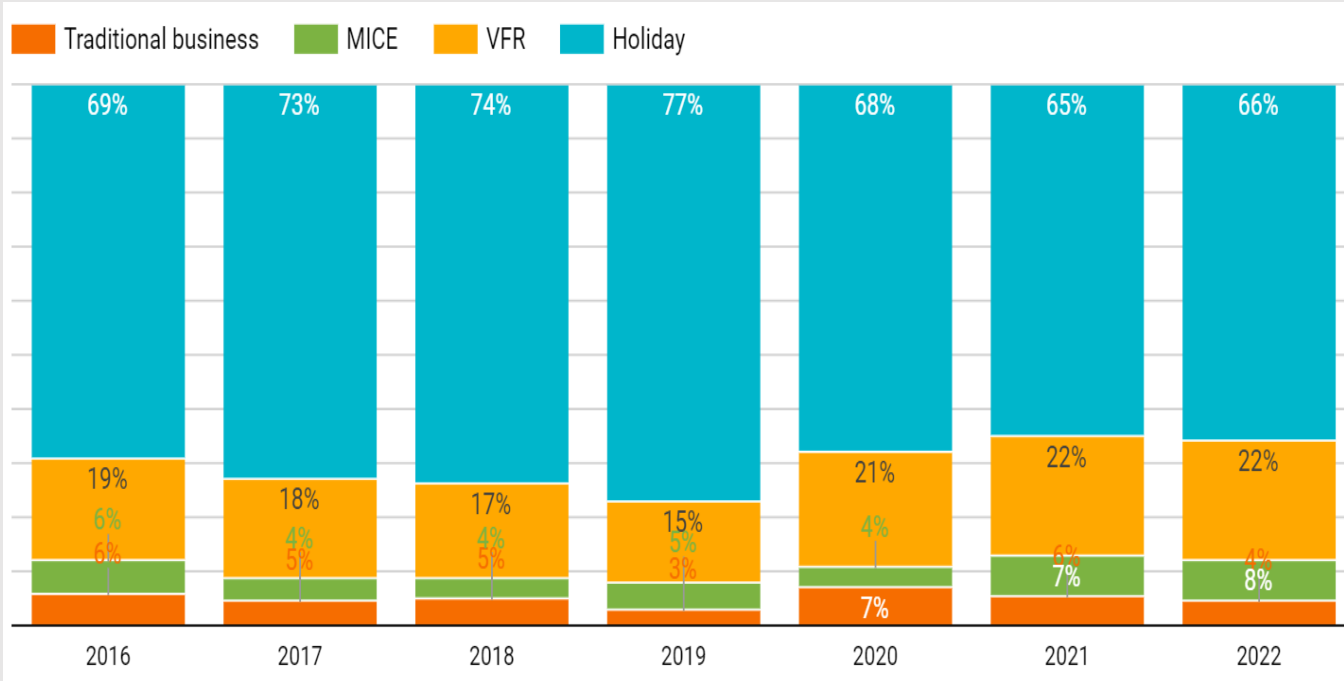


Belgian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

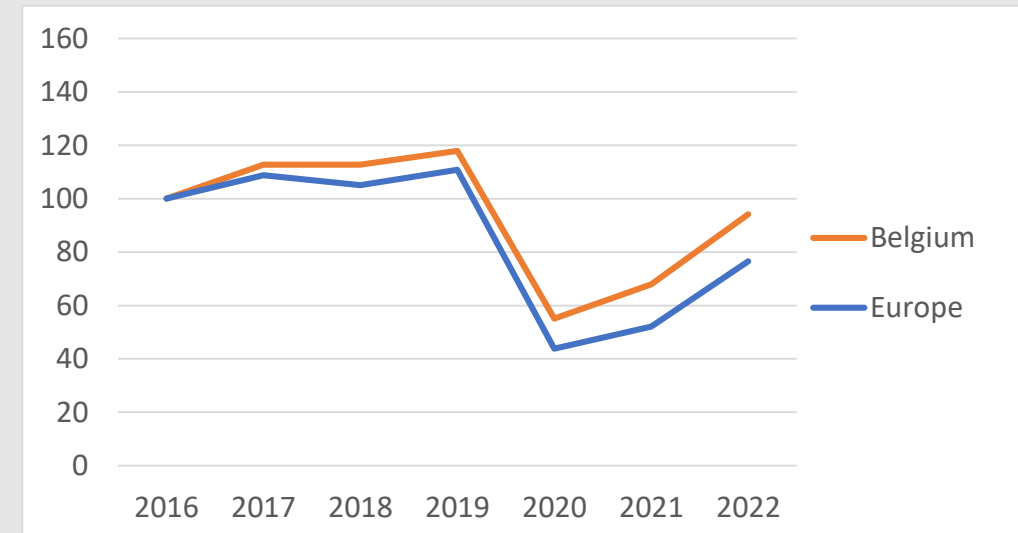
Belgian trips to Luxembourg, 2016-2022



2022

	Belgium to Luxembourg	Europe to Luxembourg
Holiday	66%	63%
VFR	22%	17%
MICE	8%	12%
Traditional Business	4%	8%

Belgian & European holiday trips to Luxembourg, 2016 = index 100

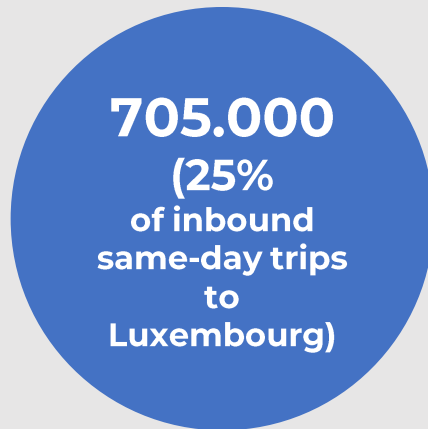


Belgian same-day trips to Luxembourg

2022

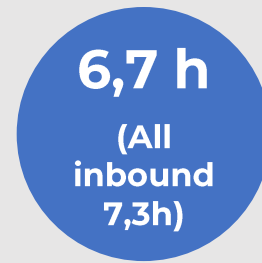


Number of Belgian same-day trips to Luxembourg

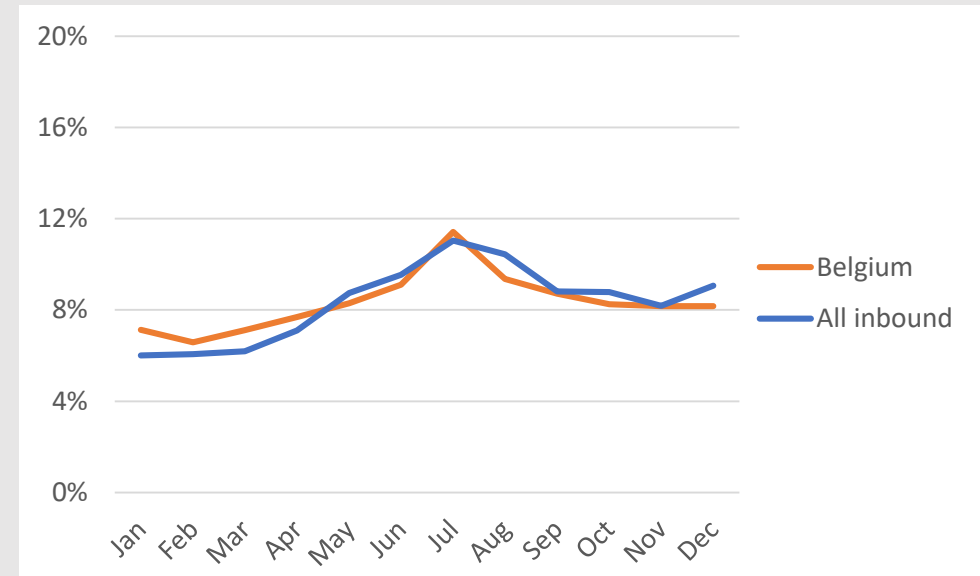


-4% (vs. 2021)

Average length of same-day trips



Seasonality of same-day trips, % monthly share





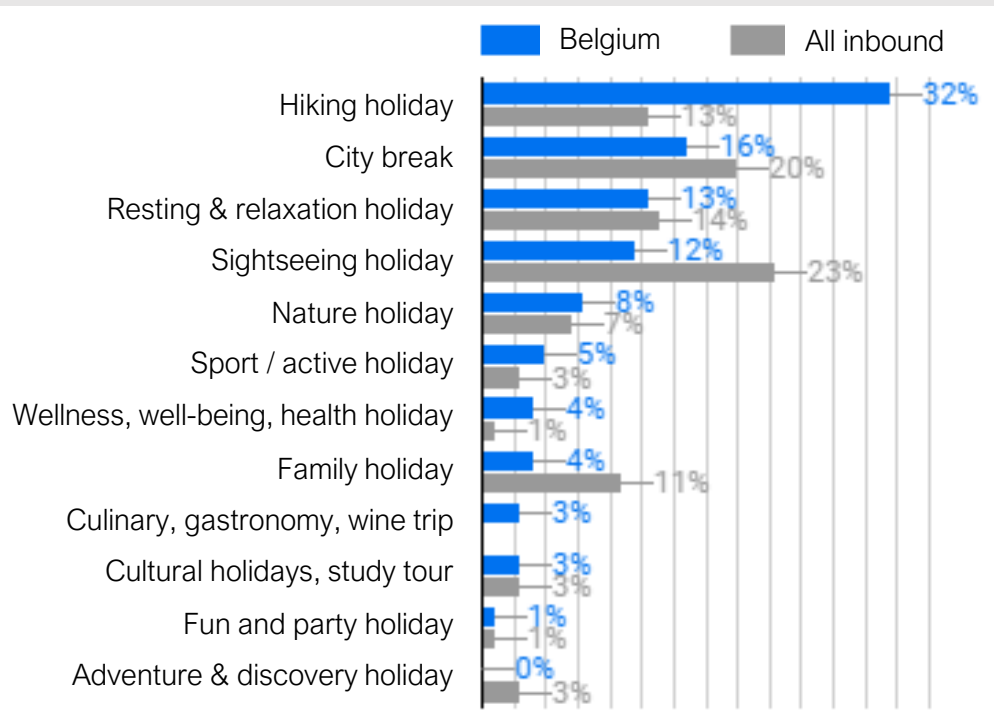
Travel behaviour of Belgian leisure visitors in Luxembourg

Holiday types

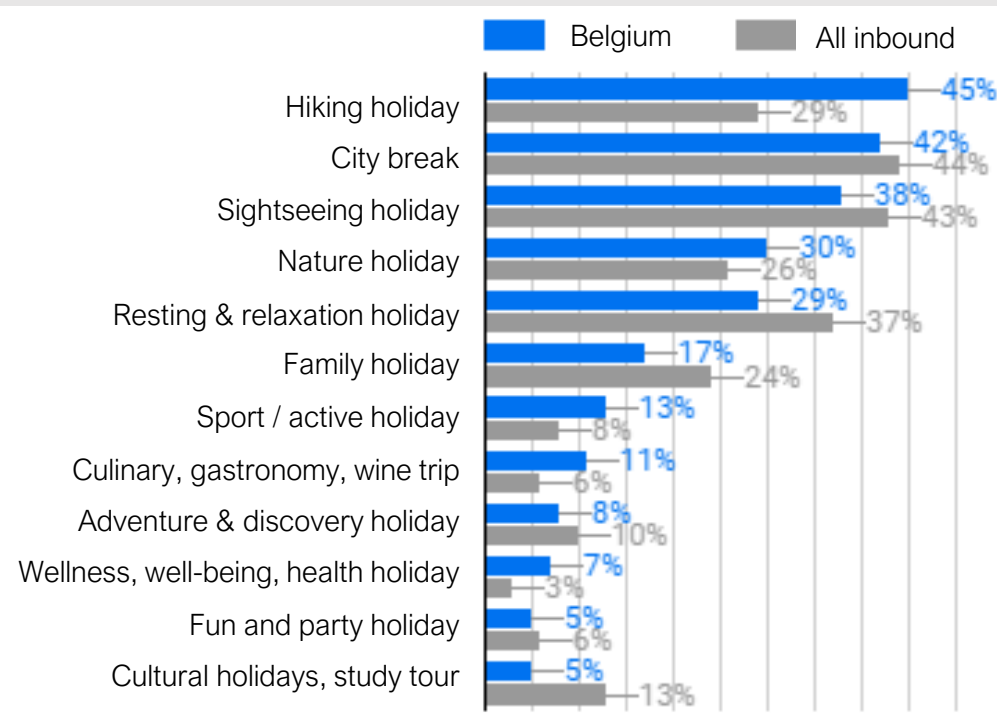
Inbound leisure visitors with overnight, 2020-2022



Main holiday types

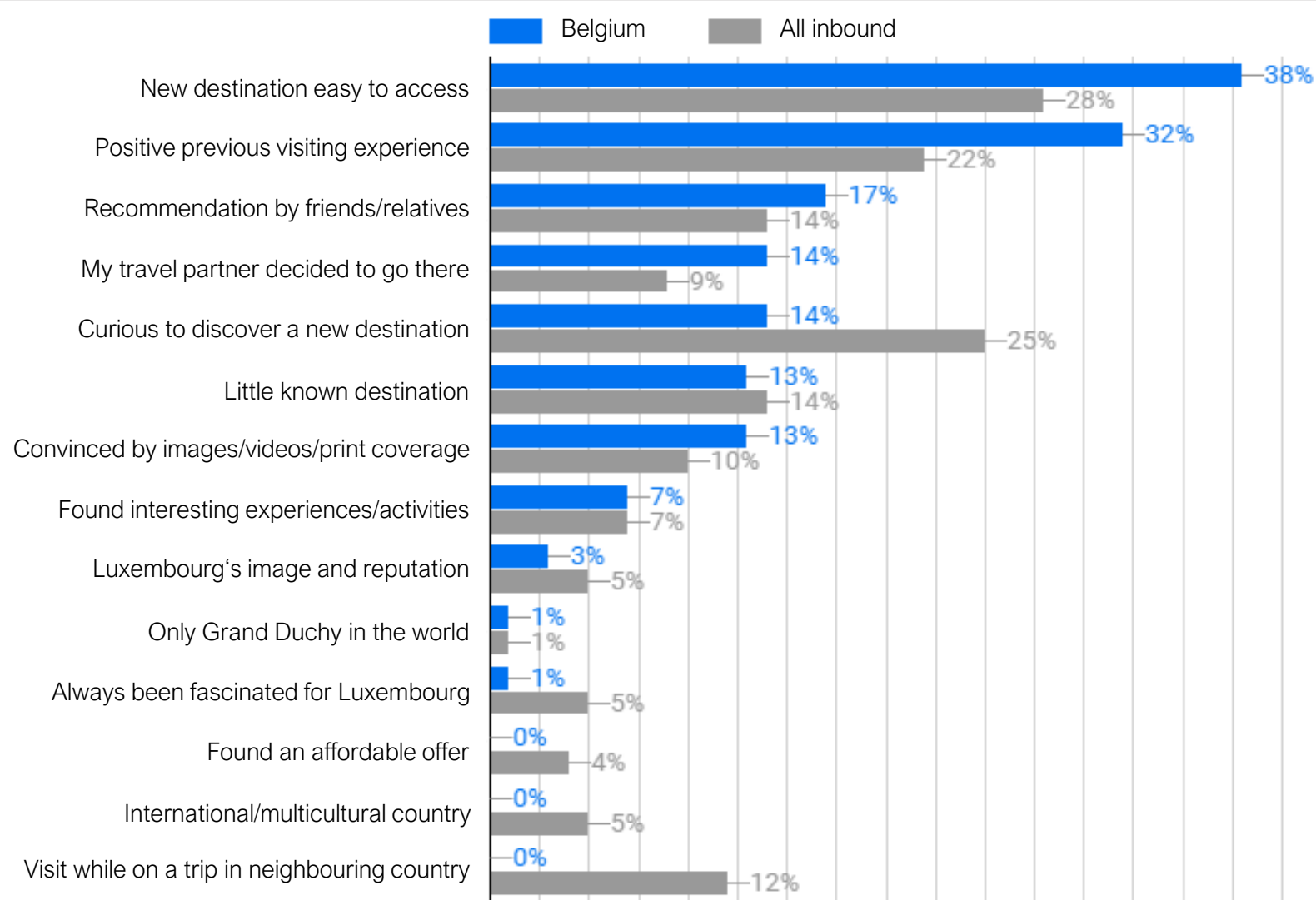


Additional holiday types



Key decision criteria for choosing Luxembourg

Inbound leisure visitors with overnight (*), 2020-2022

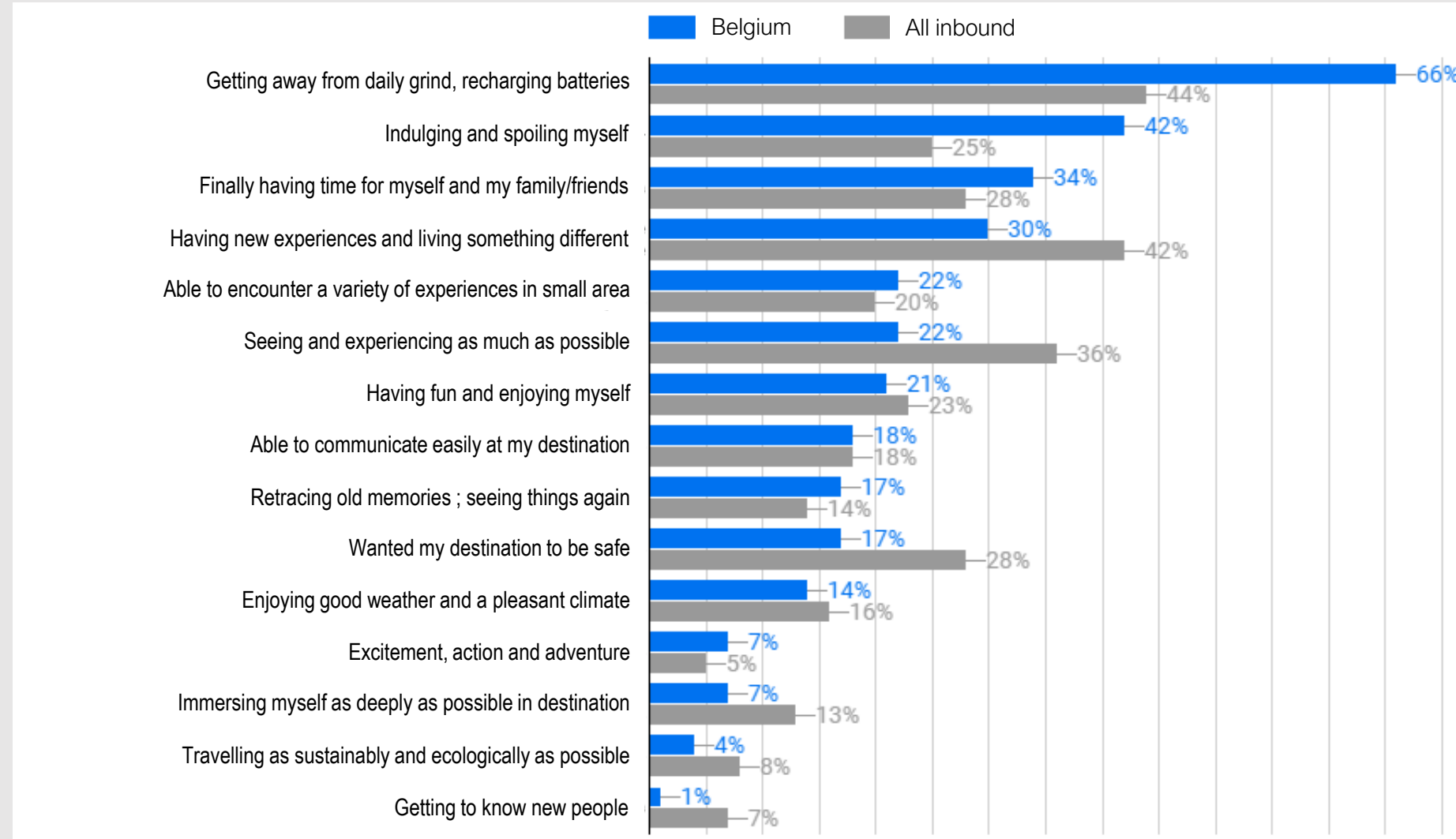


Source: LFT/Ilres Visitor Survey, 2020-2022.

(*) Maximum 3 answers possible.

Key travel motivations

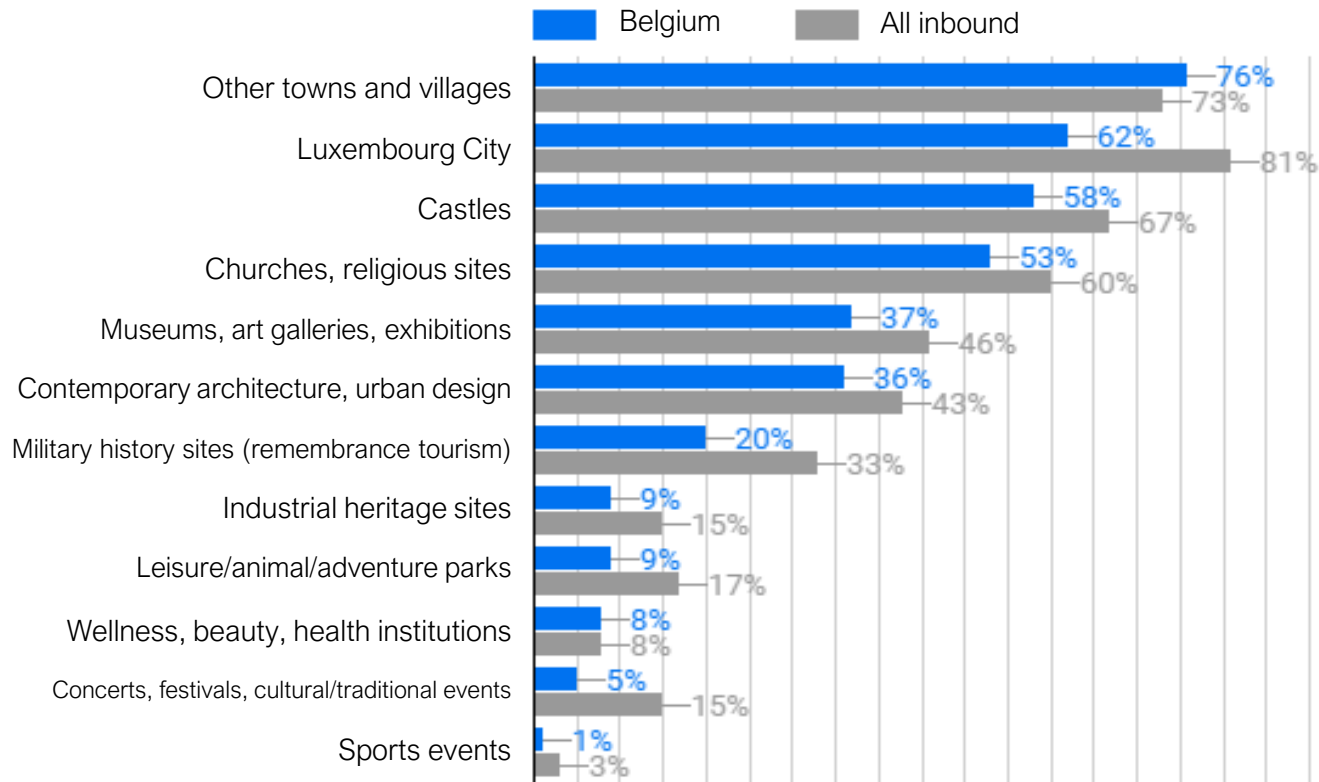
Inbound leisure visitors with overnight, 2020-2022



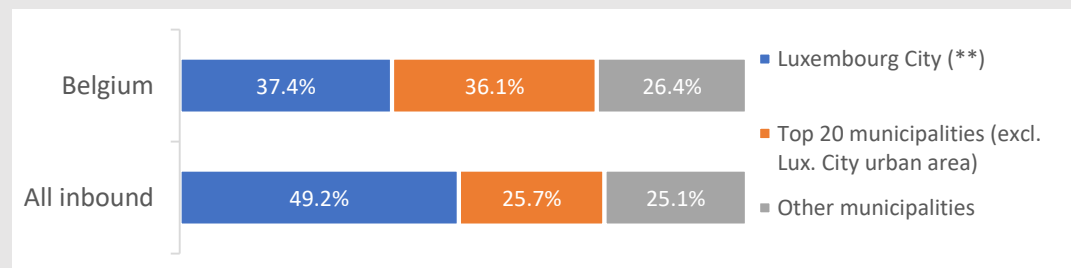
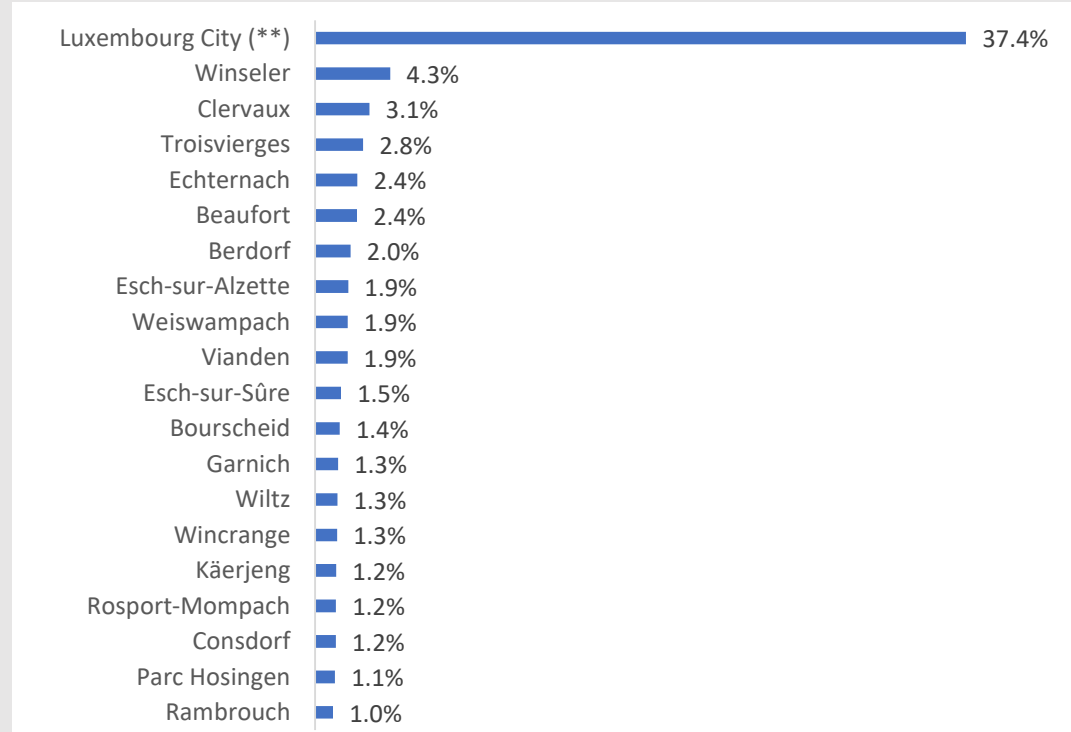
Type of places and cities visited in Luxembourg



Places visited during leisure overnight stays¹



Top cities visited during Belgian overnight and same-day trips² (*), 2022



Sources: ¹LFT/Ilres Visitor Survey, 2020-2022, ²Mobile phone data (Editus/LFT).

(*) In the case of overnight trips : includes city where night is spent. Includes all cities with at least 1 hour of visit.

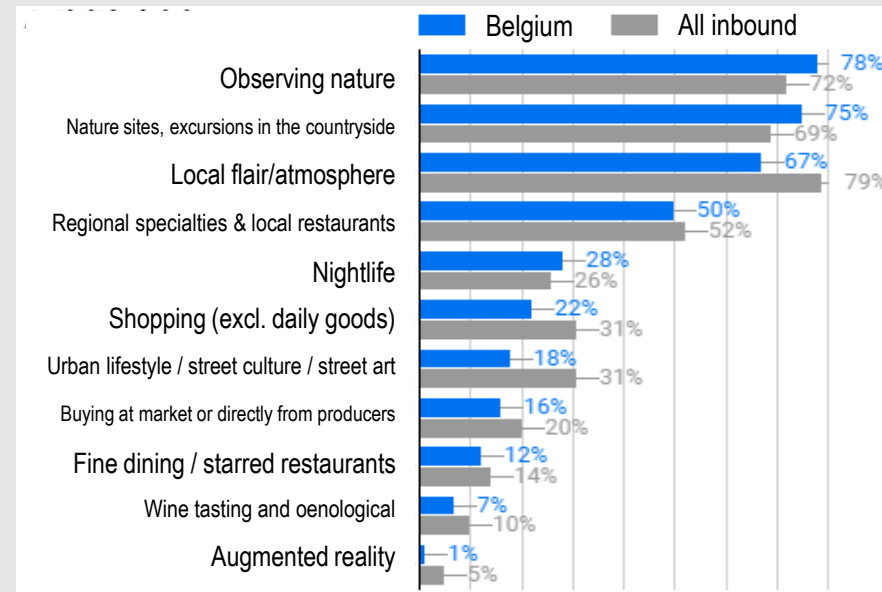
(**) Urban area, incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange).

Activities undertaken in Luxembourg

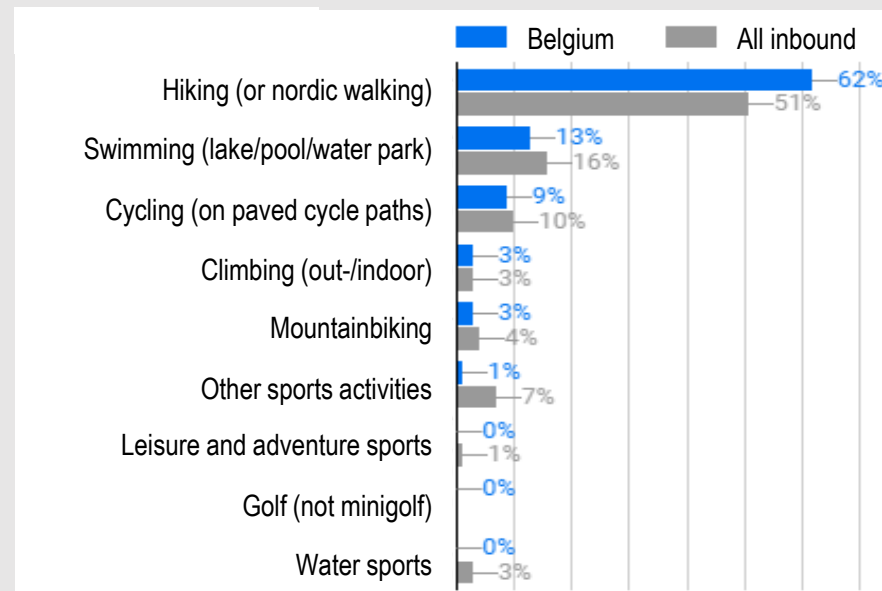
Inbound leisure visitors with overnight, 2020-2022



Non-sporting activities



Sporting activities

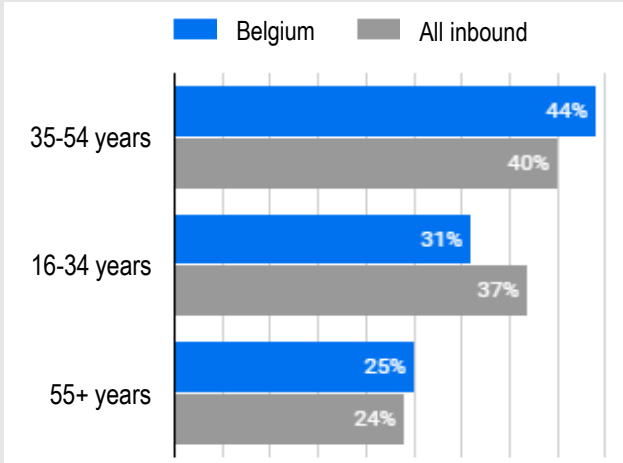


Transport, travel party, age, repeat visits and cross-border trips

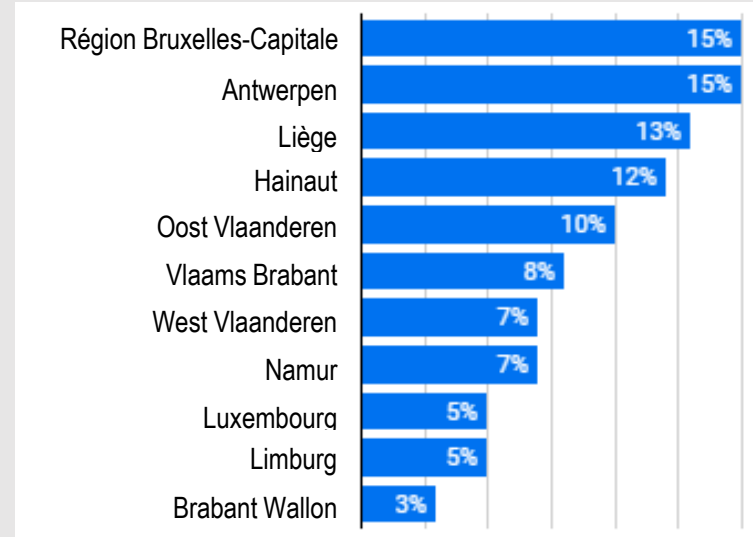
Inbound leisure visitors with overnight, 2020-2022



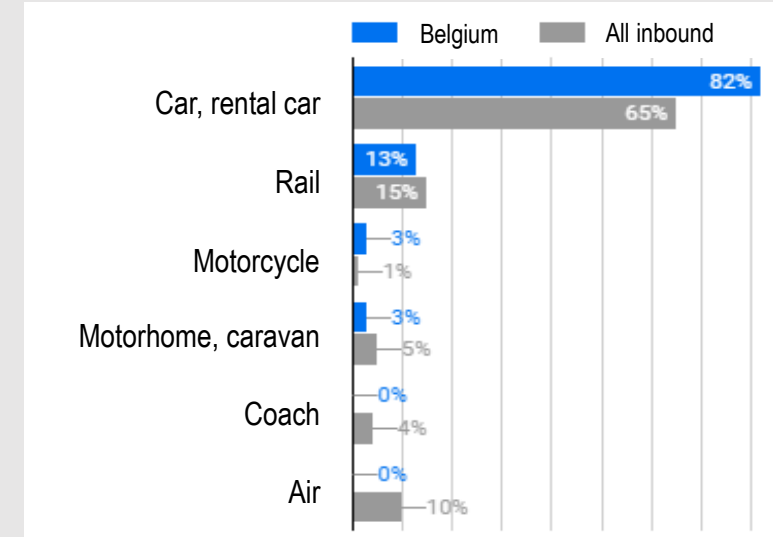
Age groups



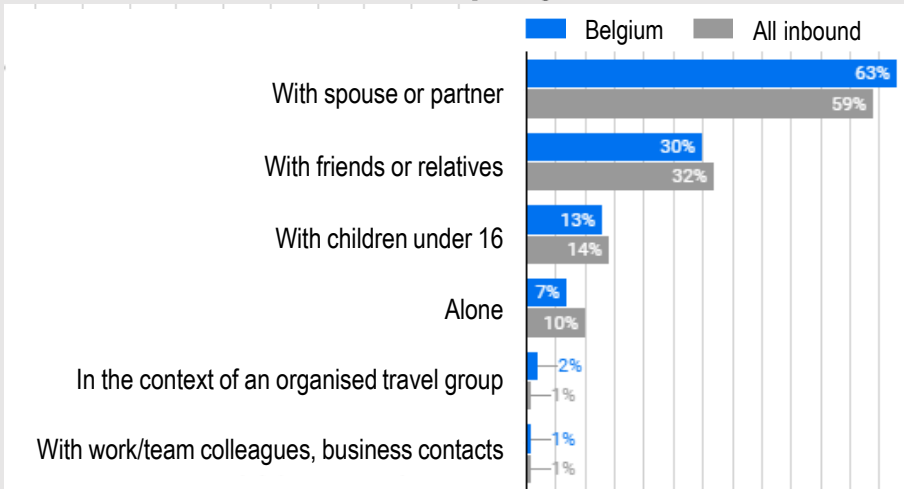
Region of origin



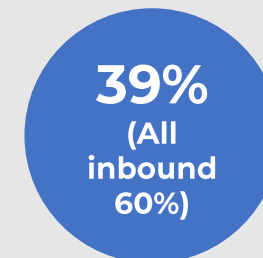
Mode of transport to access Luxembourg



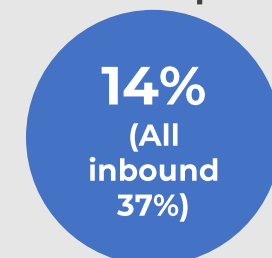
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

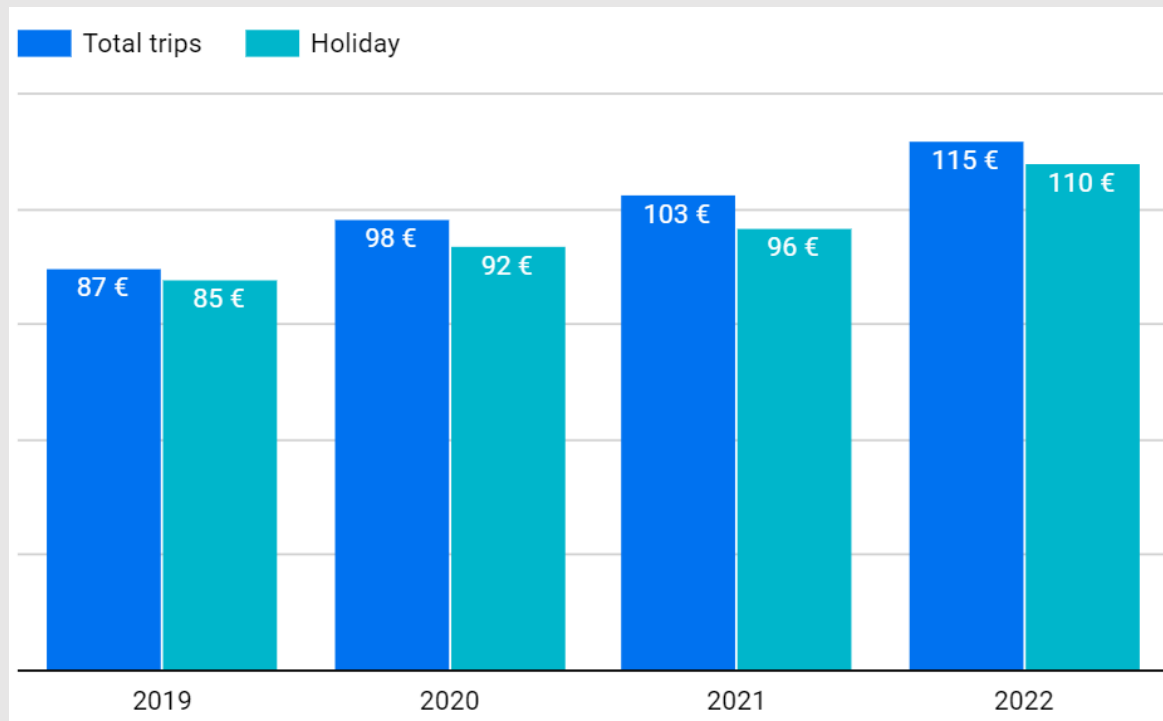


Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

**Belgian trips to Luxembourg :
average spend per pers. per day**



2022

Belgium to Luxembourg **Europe to Luxembourg**

Spend/day/pers. on **all** trips

115 €

124 €

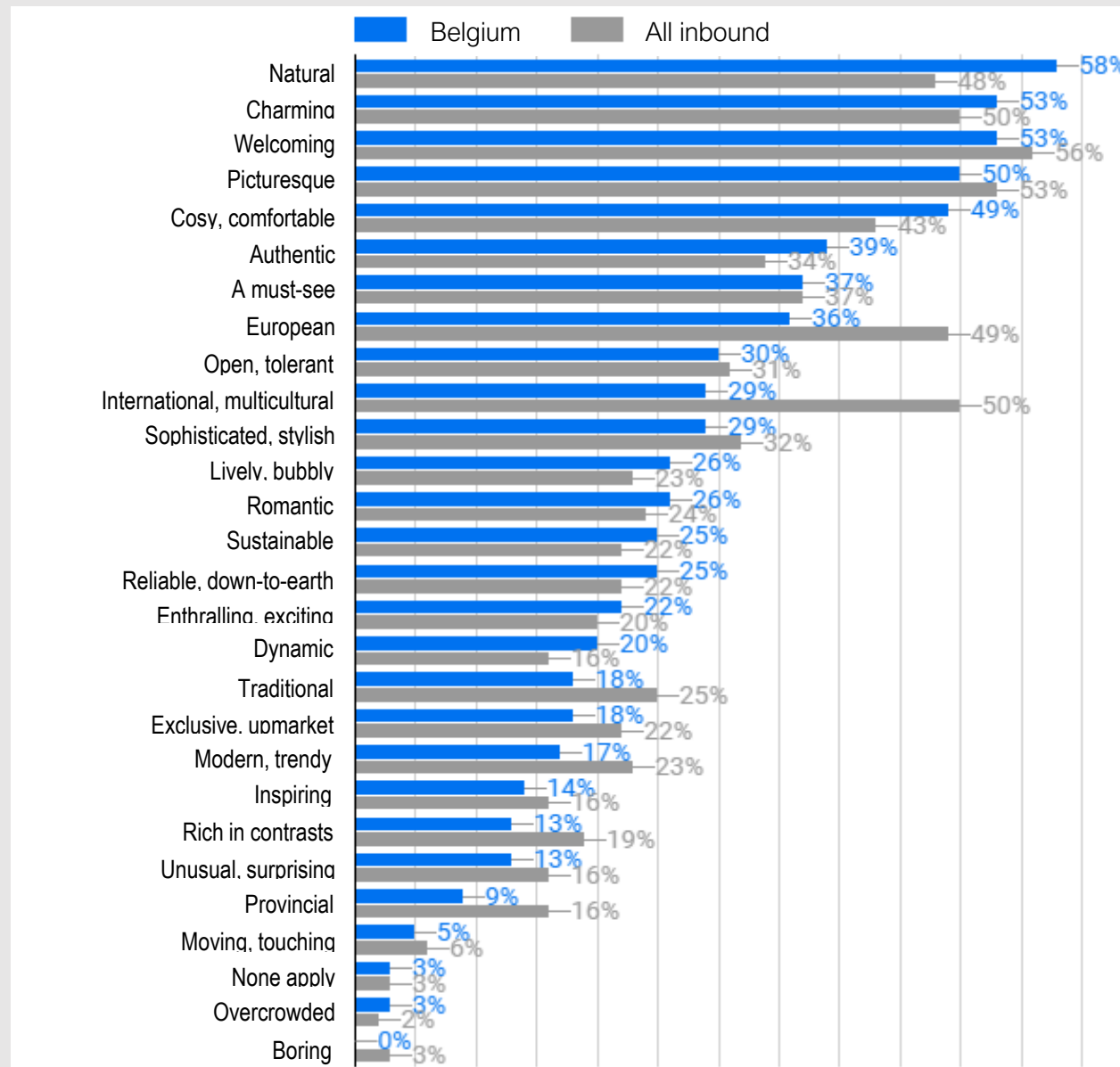
Spend/day/pers. on **holiday** trips

110 €

118 €

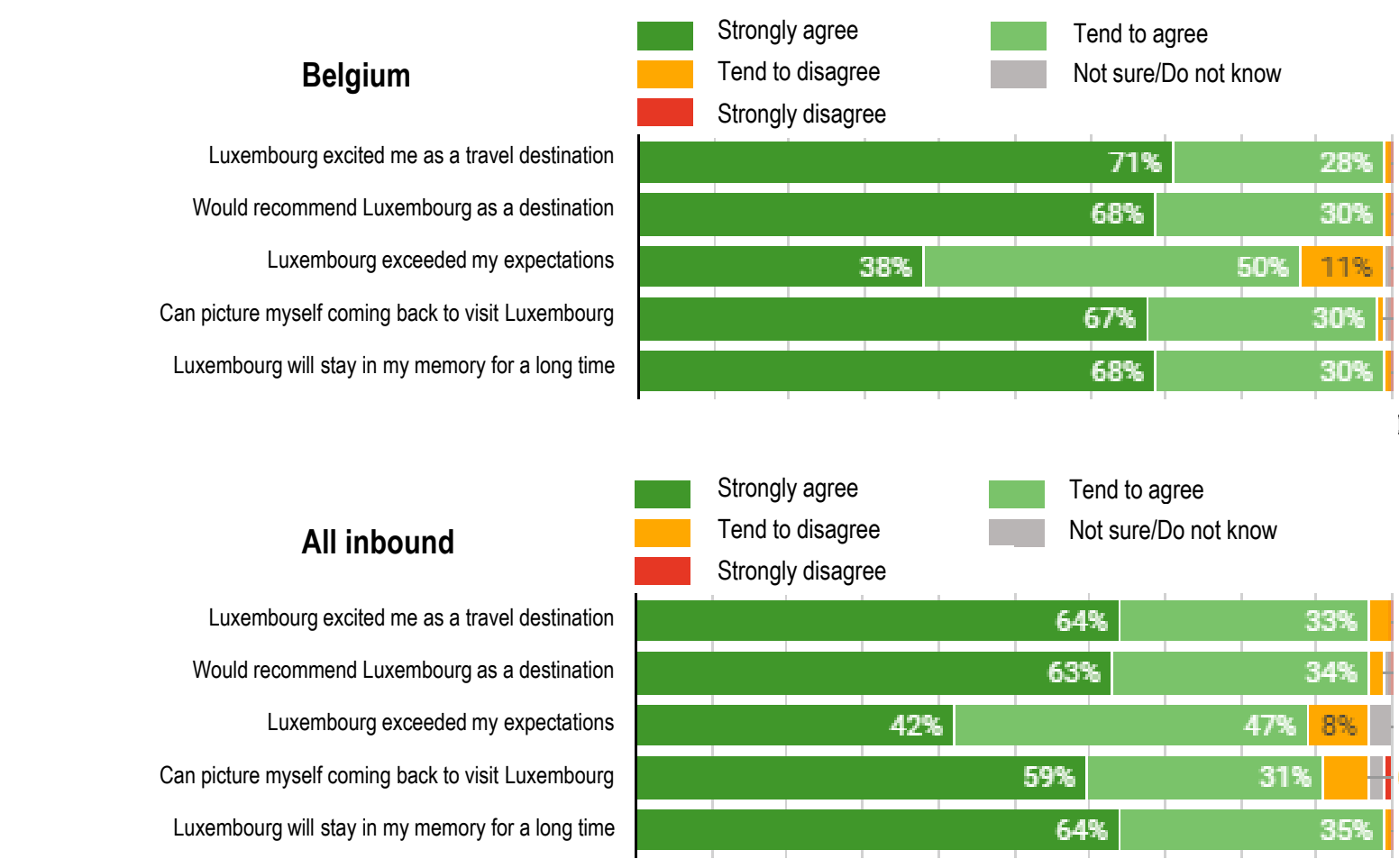
Image perception of Luxembourg

Leisure overnight visitors



Visitor satisfaction and recommendation

Inbound leisure visitors, 2020-2022



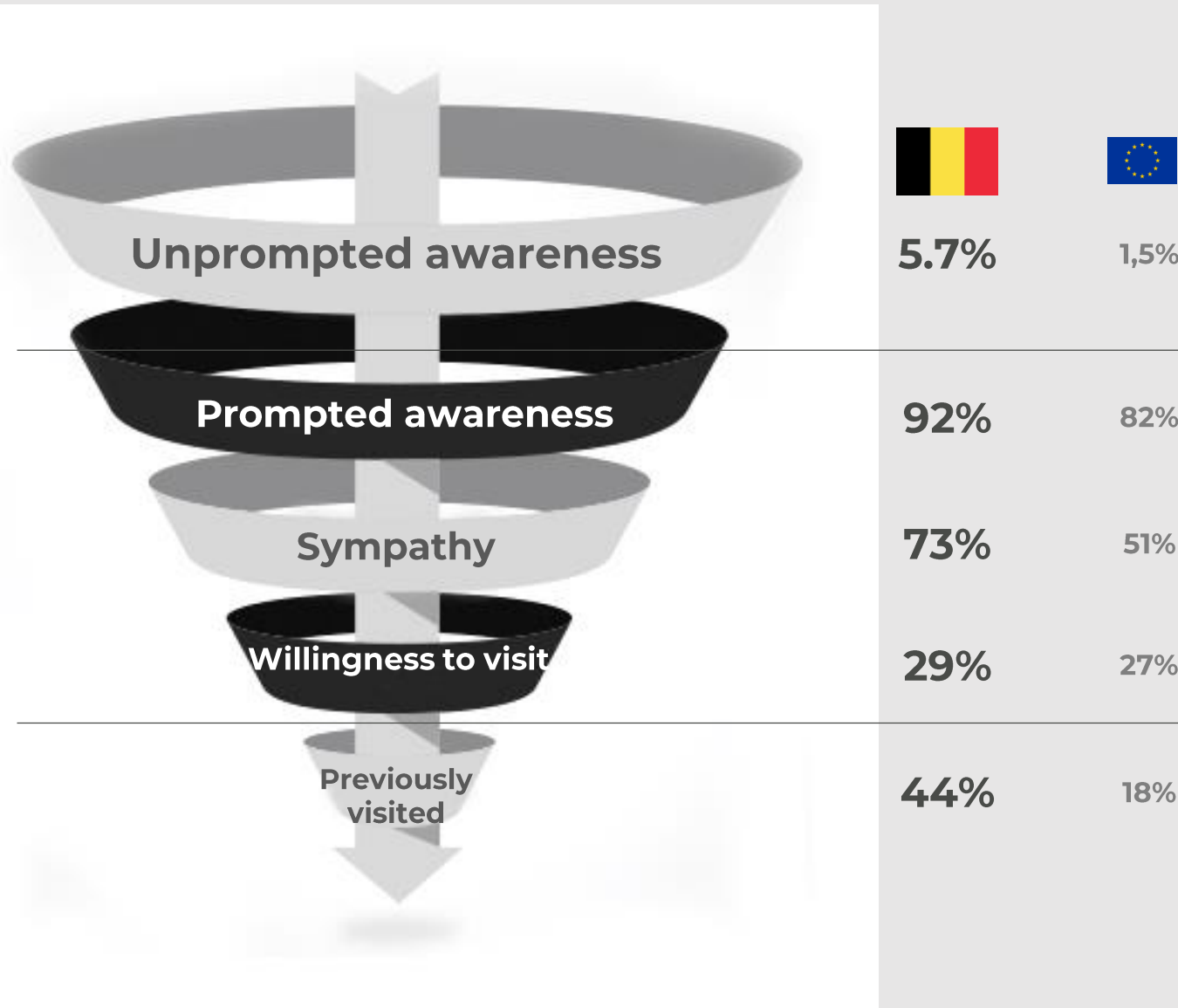
Source: LFT/Ilres Visitor Survey, 2020-2022.



Target segments, Brand & Growth Potential

Brand Funnel 2021-2023

Assessing Luxembourg's brand strength as a destination



Total future visitor potential from Belgium (*)

2.5 million

Highest future travel intent from Belgium (**)

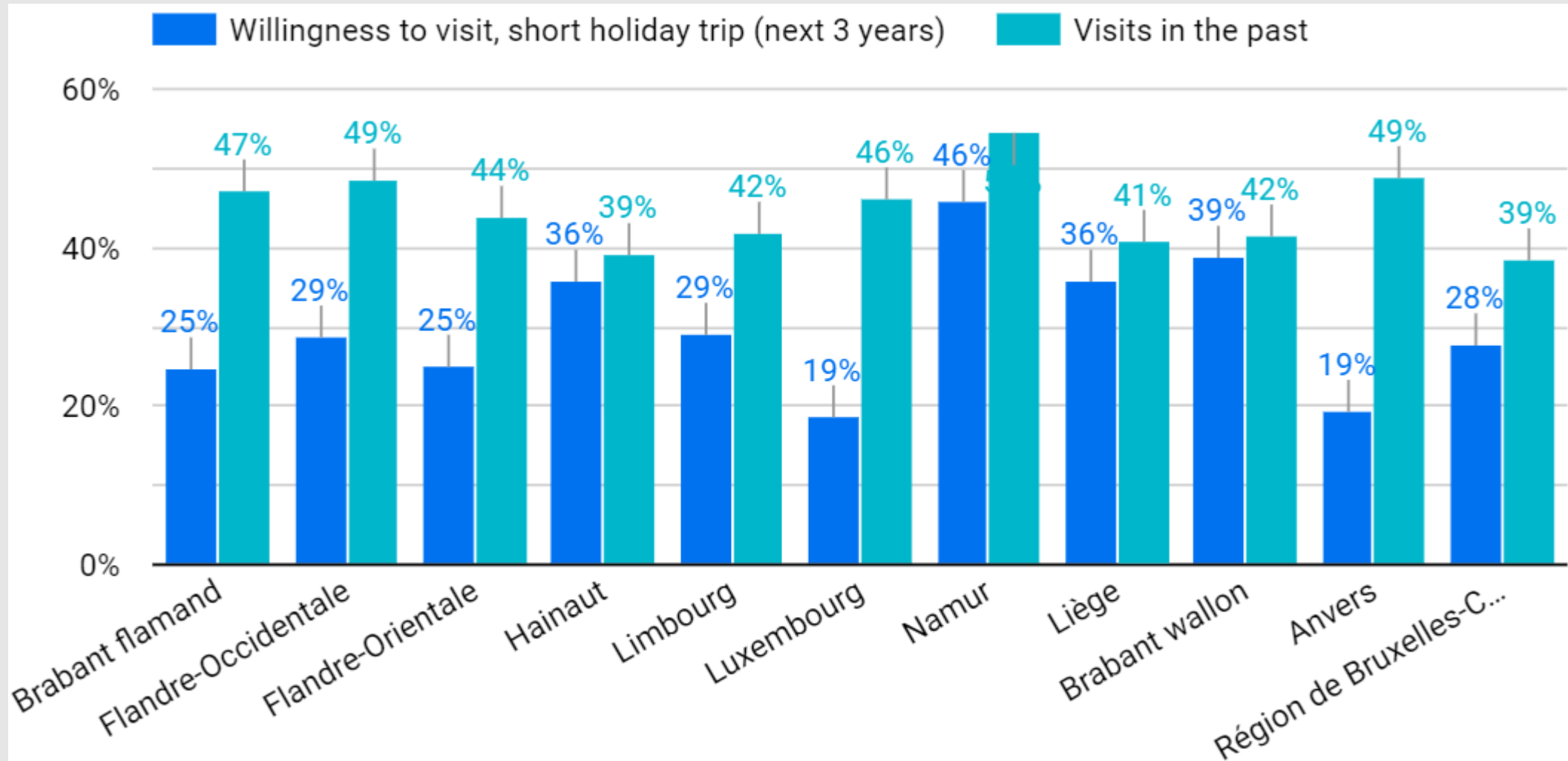
1. Nature-Loving Actives
2. Explorers
3. Short Breakers

(*) Based on travel intent for next 3 years.

(**) Based on relative shares of travel intent for next 3 years.




Regional origin 2021-2022

Past visitors and future potential



General theme interest (*)






Theme			
	Rank	Rank	% interested
Resting/Relaxation	1	1	83%
Nature	3	2	78%
Culinary	2	3	67%
Hiking	8	4	62%
History/Unesco	7	5	59%
City	4	6	56%
Castles	5	7	54%
Culture	6	8	51%
Shopping	9	9	44%
Remembrance	16	10	37%
Wellness	12	11	36%
Cycling	18	12	34%
Family	10	13	34%
Wine	14	14	34%
Events	13	15	31%
Active-sports	15	16	26%
Camping	17	17	20%
Nightlife	11	18	18%
MTB	19	19	14%

(*) Interest in themes with regard to holiday trips with overnight (regardless of specific destinations).
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

Luxembourg's Theme Competence (*)



Theme			
	Rank	Rank	% agreeing
Nature	7	1	66%
Hiking	10	2	66%
Resting/Relaxation	2	3	65%
Culinary	6	4	58%
Castles	3	5	54%
City	1	6	54%
Cycling	13	7	50%
Shopping	5	8	50%
Culture	4	9	46%
Wellness	9	10	44%
MTB	20	11	42%
Wine	16	12	42%
History/Unesco	8	13	41%
Active-sports	18	14	40%
Camping	15	15	38%
Family	14	16	34%
Industrial Heritage	19	17	29%
Events	-	18	24%
Nightlife	11	19	15%

Growth potential for themes (**)




- Culinary
- History/Unesco
- Culture & Events
- Remembrance

(*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

(**) Themes for which Luxembourg's theme suitability is still relatively low, compared to the overall general theme interest. Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

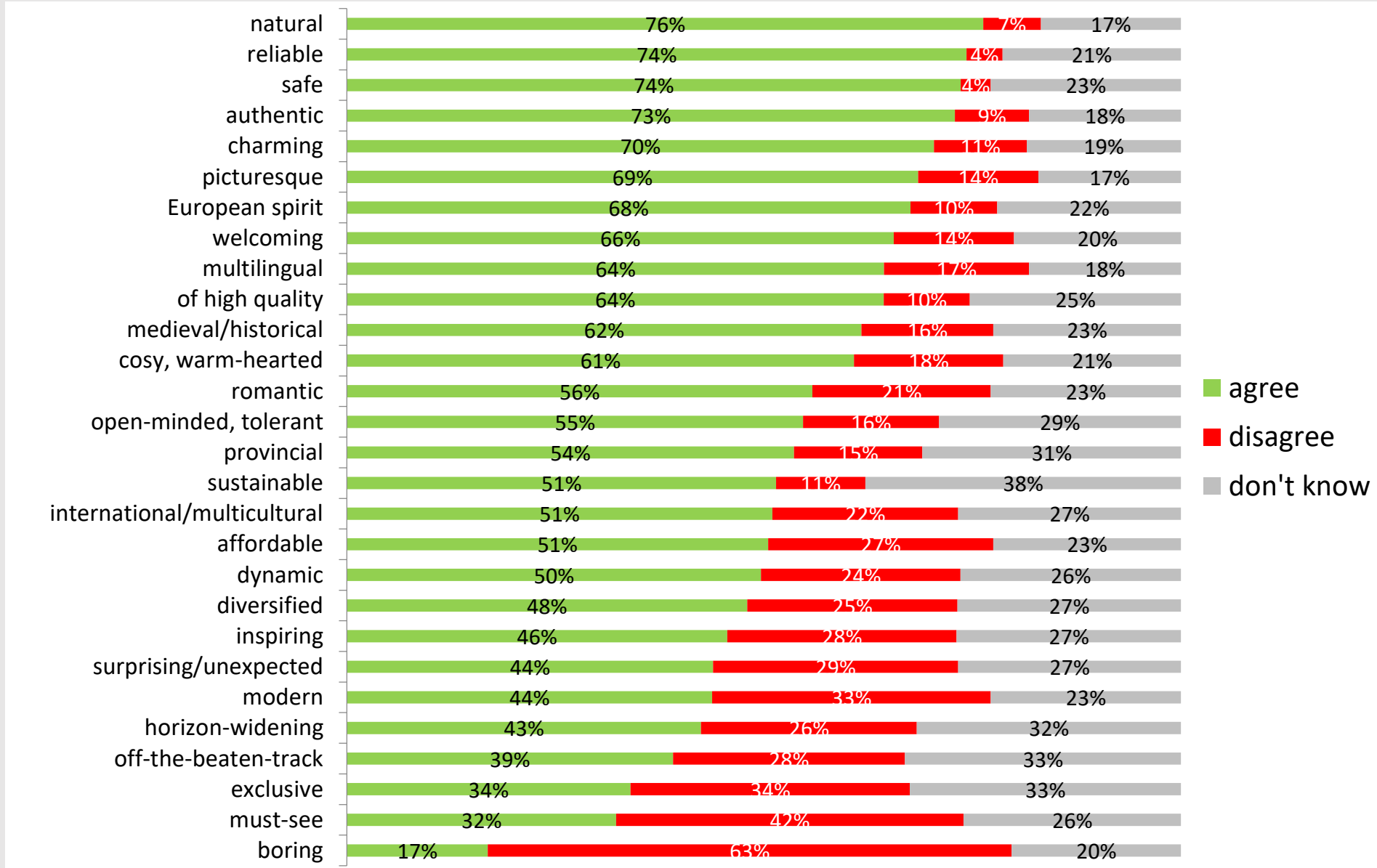
Luxembourg's Brand Value Ratings (*)



Feature			
	Rank	Rank	% agreeing
Safe	1	1	74%
Authentic	3	2	73%
Attractive, appealing	5	3	69%
Welcoming, hospitable	4	4	66%
Of high quality	2	5	64%
Open-minded, tolerant	8	6	55%
Sustainable	13	7	51%
Dynamic, modern	6	8	50%
Lot of variety, diversified	10	9	48%
Surprising	9	10	44%
Lively, hip	11	11	44%
Not crowded, insider tip	12	12	39%
Exclusive, luxurious	7	13	34%

(*) Brand feature associated with destination Luxembourg, % of respondents agreeing.
 Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-IE-DK-SE-PT.

Supported brand profile and personality of Luxembourg



Spontaneous associations with Luxembourg



LFT strategic market focus

Market prioritisation



Market Priority	Main Objective	Target Segment focus (in decreasing order of importance within category)
		Bold : main focus
3	Activating	Image: PS . Activating: EXP, NLA, SB.

Theme & segment focus

Theme	Priority	Marketing	Segments
Culinary	2	Activating	EXP, SB
Nature	1	Activating	EXP, NLA
Culture	1	Image	PS
City	3	Image	PS, (SB)
Wine	3	Activating	PS
Castles	4	Image	NLA, SB

Brand Value focus

Theme	Priority	Segments
Not crowded/insider tip	1	EXP, NLA, (SB)
Service-oriented	1	
Exclusive/luxurious	2	



Your contact



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