



Luxembourg for Tourism

Market profile

BELGIUM

2023



Economic indicators & General Travel Demand

Economic indicators - General travel demand

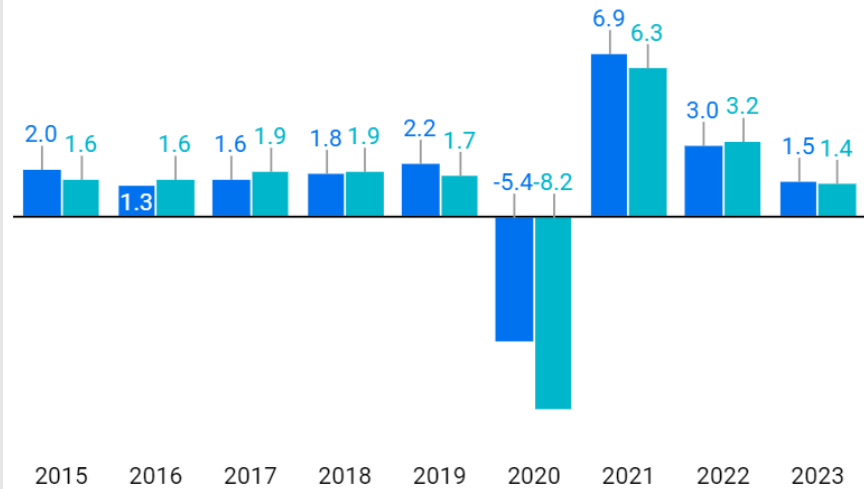


Economy & population

GDP (\$) per capita Unemployment (%) Population (mn) Inflation (%)
53,659 **5.5** **11.7** **2.3**

GDP and Consumer spending, % annual change

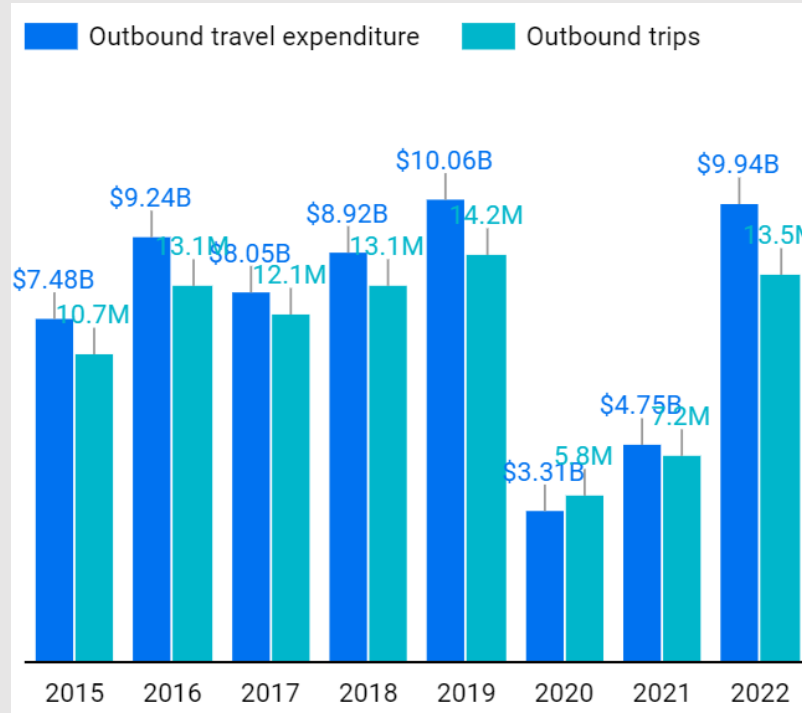
■ GDP change ■ Consumer spend



Share of short trips (1-3 nights),
 % all outbound trips (2022)
30.1%

Outbound trips and travel expenditure

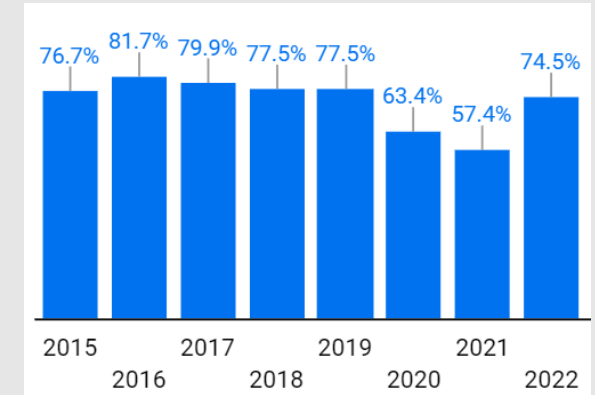
■ Outbound travel expenditure ■ Outbound trips



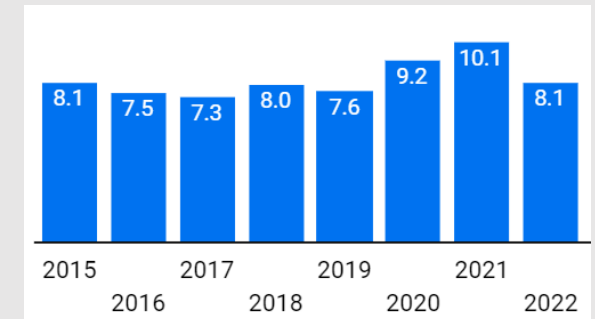
Average spend
 per outbound trip (2019)
709 \$

Outbound travel intensity
1.24 trips
 per inhabitant (2019)

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of leisure,
 % all outbound trips (2022)
92.4%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2023



**Nights,
paid accommodation, 2023**



+4% (vs. 2022)
-10% (vs. 2019)

**Arrivals,
paid accommodation, 2023**



+6% (vs. 2022)
-10% (vs. 2019)

**Average length of stay,
paid accommodation, 2023**



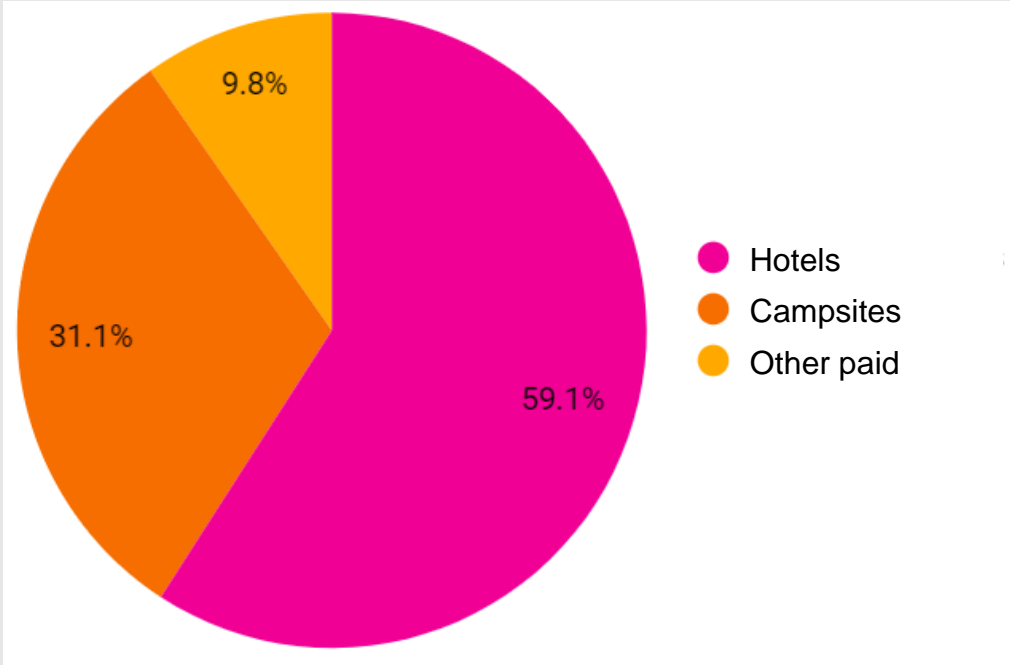
-0.06 days (vs. 2022)
-0.01 days (vs. 2019)

Nights & arrivals in paid accommodation

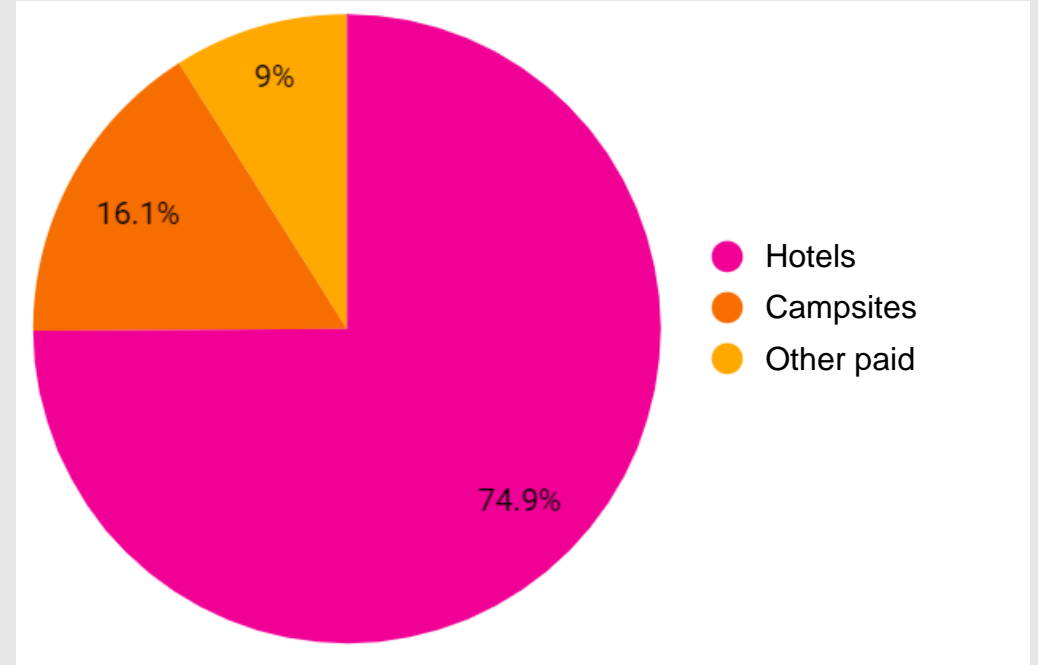


Type of accommodation, 2023

Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



Hotels	279.632	+3% (vs. 2022) -20% (vs. 2019)
Campsites	146.957	+4% (vs. 2022) +13% (vs. 2019)
Other paid accomm.	46.232	+9% (vs. 2022) +4% (vs. 2019)

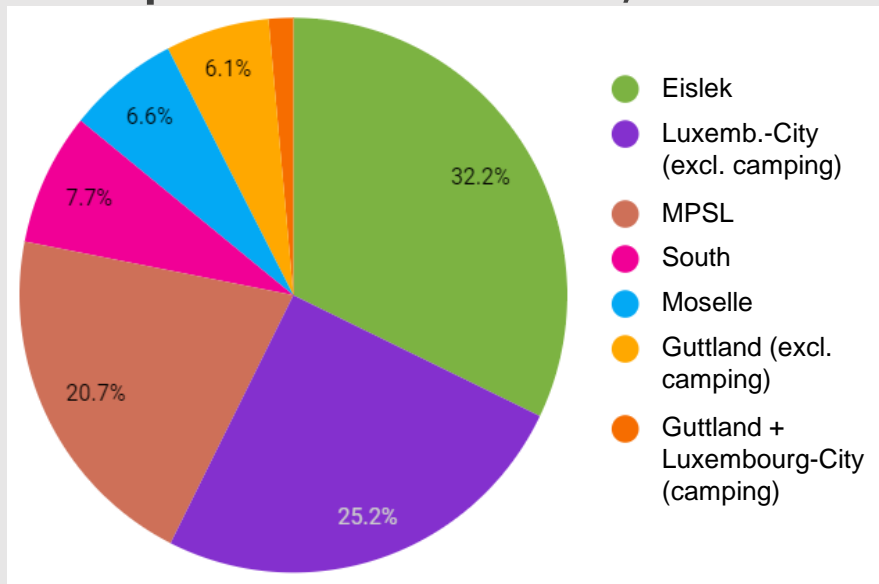
Hotels	170.747	+5% (vs. 2022) -17% (vs. 2019)
Campsites	36.732	+5% (vs. 2022) +30% (vs. 2019)
Other paid accomm.	20.501	+18% (vs. 2022) +15% (vs. 2019)

Nights & arrivals in paid accommodation

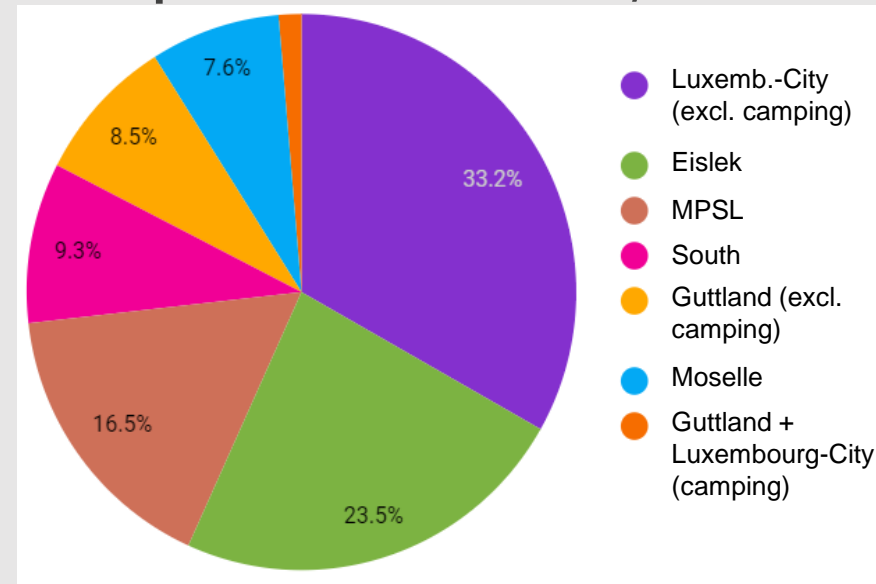
Regions, 2023



Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



Eislek	152.151	+1% (vs. 2022) -3% (vs. 2019)
Lux.-City (excl. camping)	119.247	+10% (vs. 2022) -24% (vs. 2019)
MPSL	97.880	+12% (vs. 2022) +8% (vs. 2019)
South	36.582	-12% (vs. 2022) +2% (vs. 2019)
Moselle	31.152	-4% (vs. 2022) -21% (vs. 2019)
Guttland (excl. camping)	28.941	+3% (vs. 2022) -27% (vs. 2019)
Guttland/Lux.-City (camping)	6.868	+2% (vs. 2022) -9% (vs. 2019)

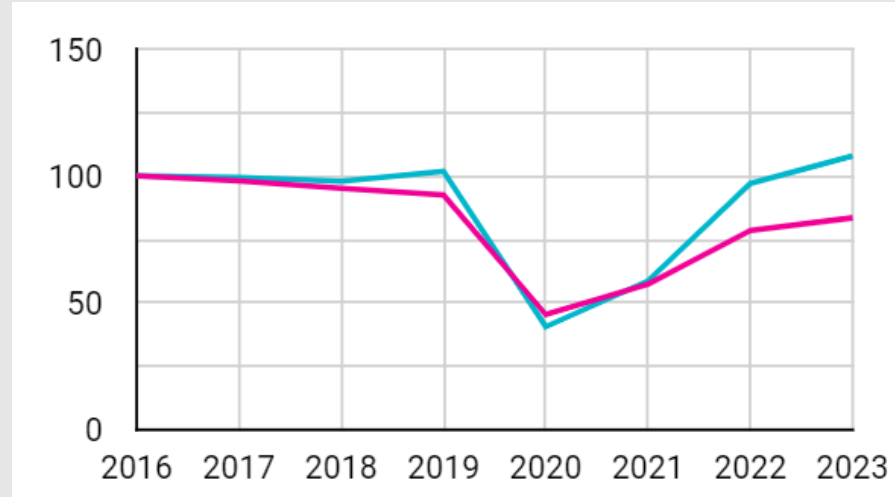
Lux.-City (excl. camping)	75.696	+10% (vs. 2022) -19% (vs. 2019)
Eislek	53.689	+0% (vs. 2022) -9% (vs. 2019)
MPSL	37.520	+16% (vs. 2022) +23% (vs. 2019)
South	21.266	+2% (vs. 2022) +2% (vs. 2019)
Guttland (excl. camping)	19.350	+7% (vs. 2022) -18% (vs. 2019)
Moselle	17.414	-1% (vs. 2022) -18% (vs. 2019)
Guttland/Lux.-City (camping)	3.045	+6% (vs. 2022) -1% (vs. 2019)

Arrivals in paid accommodation

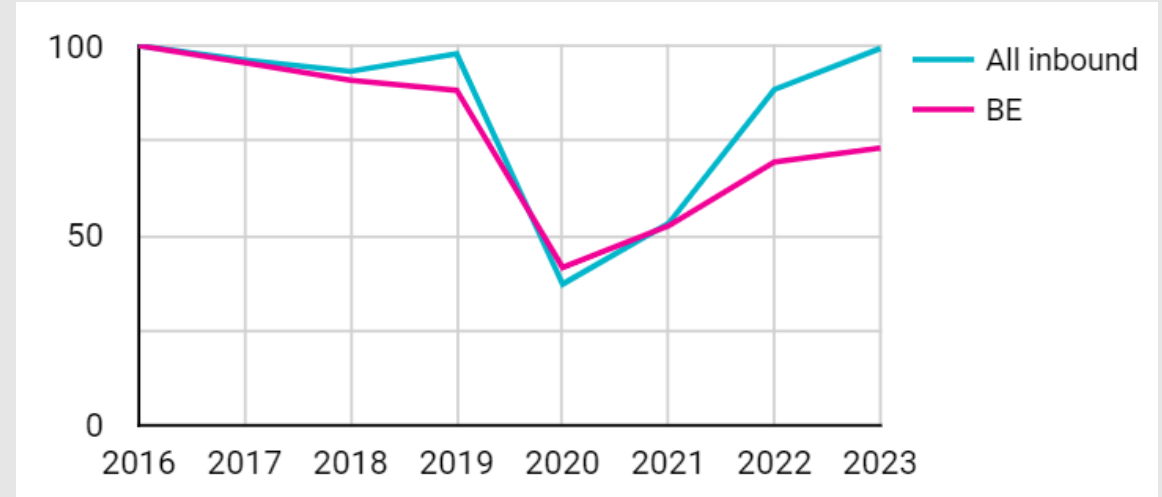
Trends 2016-2023



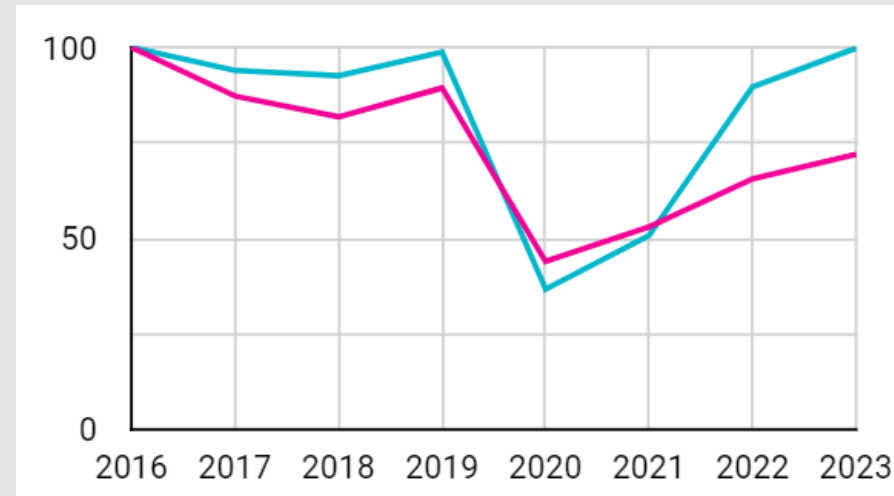
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



All paid accommodation (*), Luxembourg City (2016 = Index 100)



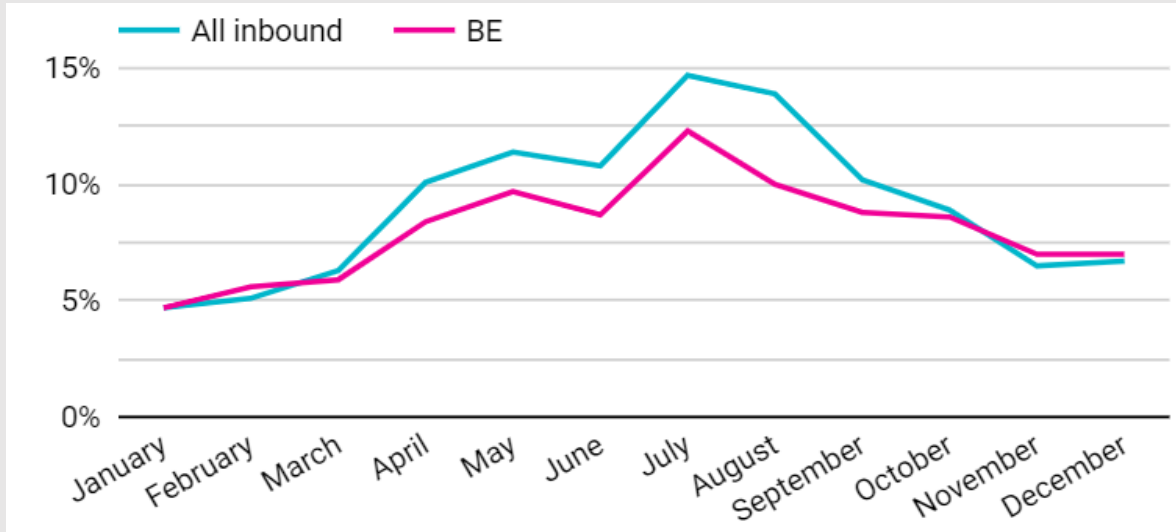
(*) excluding camping.
Source: Statec

Arrivals in paid accommodation

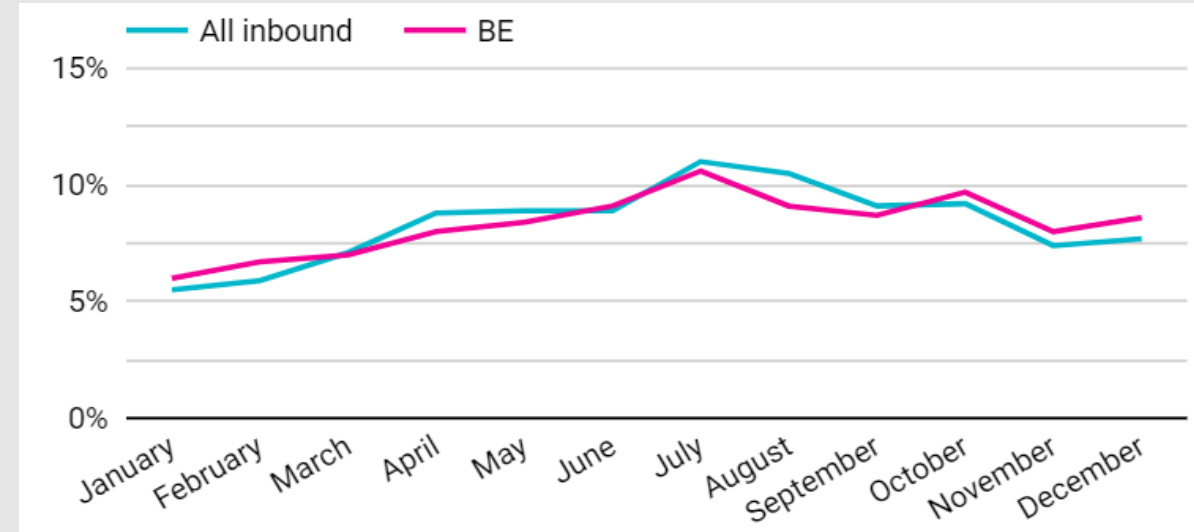
Seasonality



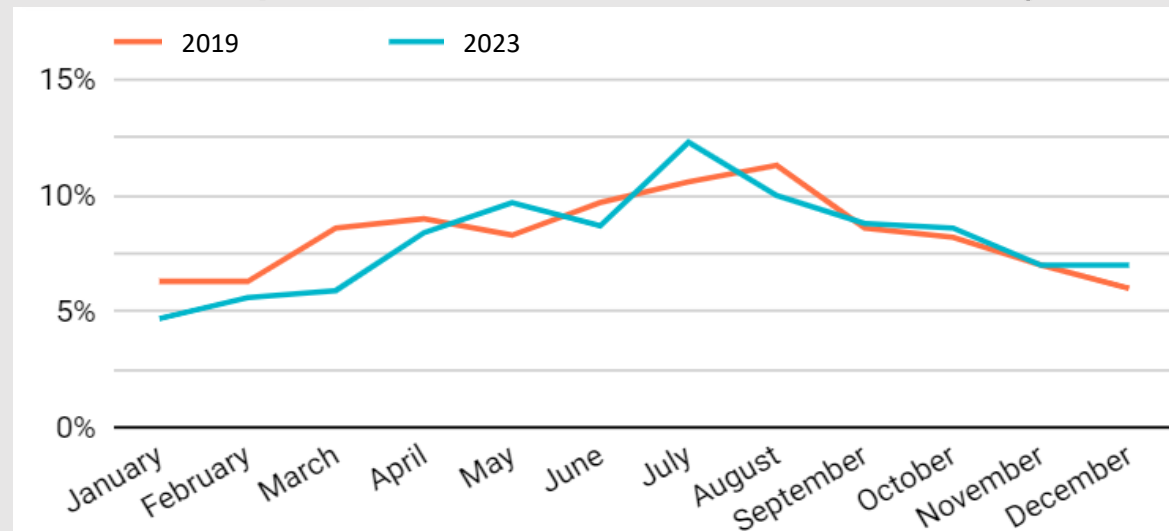
All paid accommodation, 2023



Hotels, 2023



All paid accommodation, arrivals from Belgium



Short-term rentals

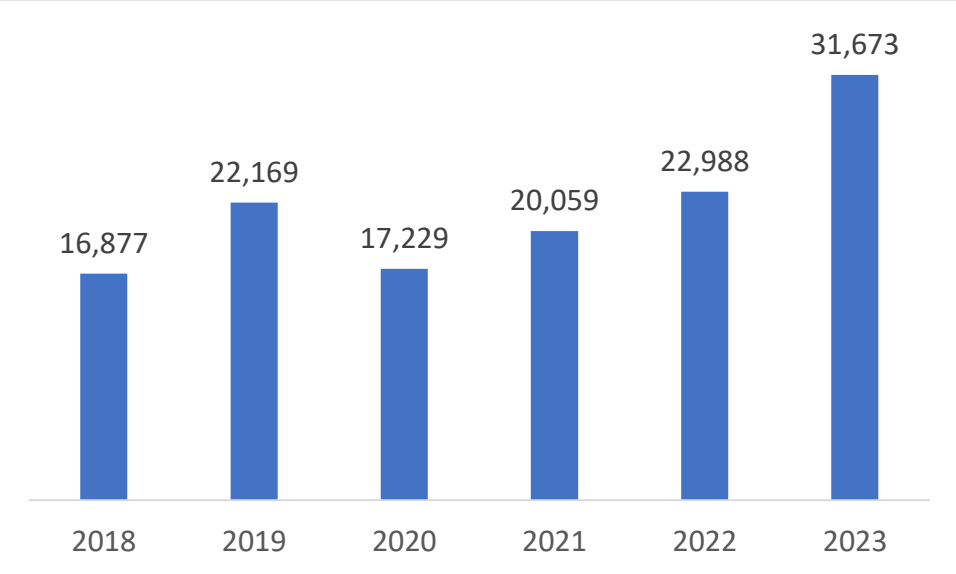


**Nights,
Short-term rentals, 2023**



+38% (vs. 2022)
+43% (vs. 2019)

**Nights,
Short-term rentals, 2018-2023**





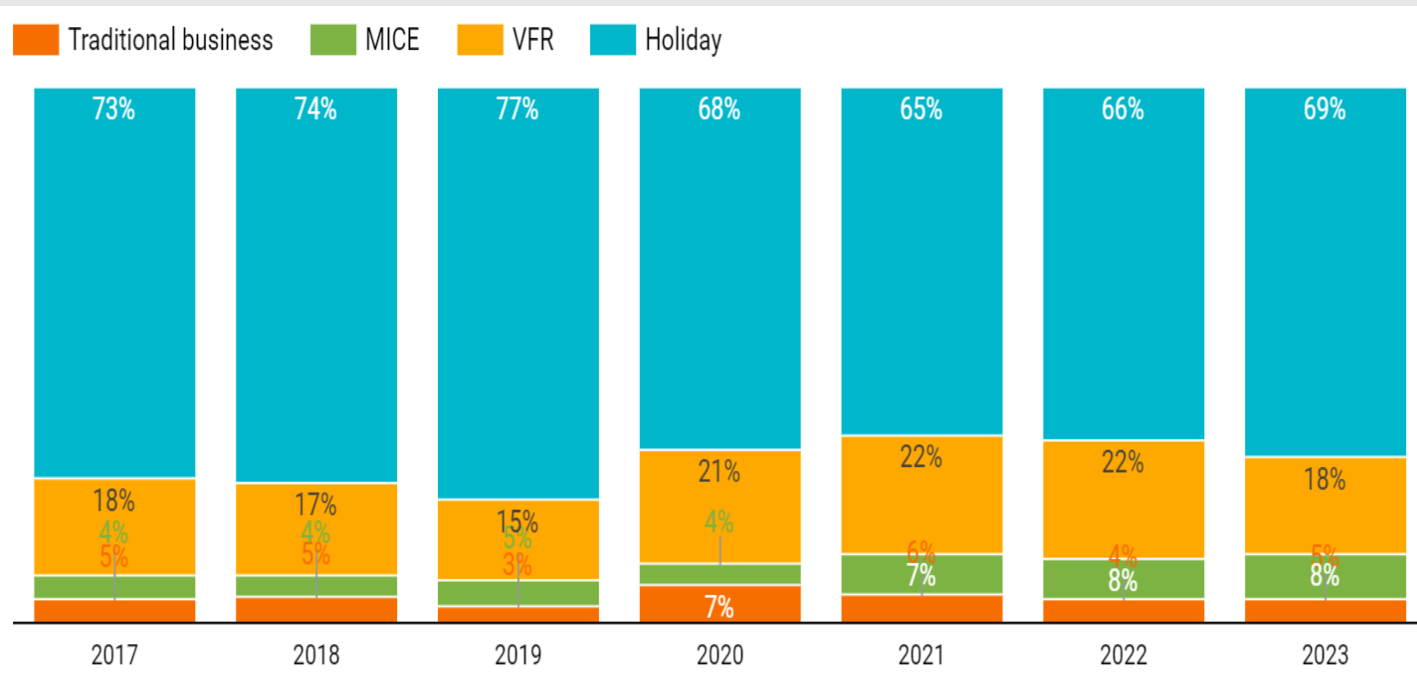
Characteristics of Belgian inbound trips to Luxembourg

Belgian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2017-2023

Belgian trips to Luxembourg, 2017-2023



2023

Belgium to Luxembourg Europe to Luxembourg

Holiday	69%	62%
VFR	18%	15%
MICE	8%	14%
Traditional Business	5%	9%



Travel behaviour of Belgian leisure visitors in Luxembourg

Holiday types

Inbound leisure visitors with overnight, 2023



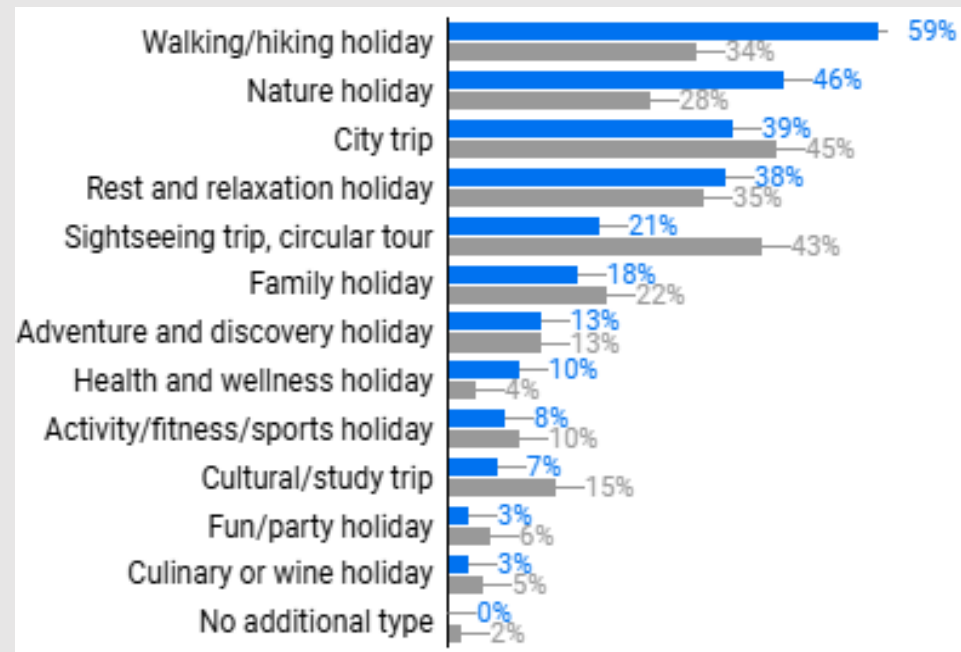
Belgium

All inbound

Main holiday types

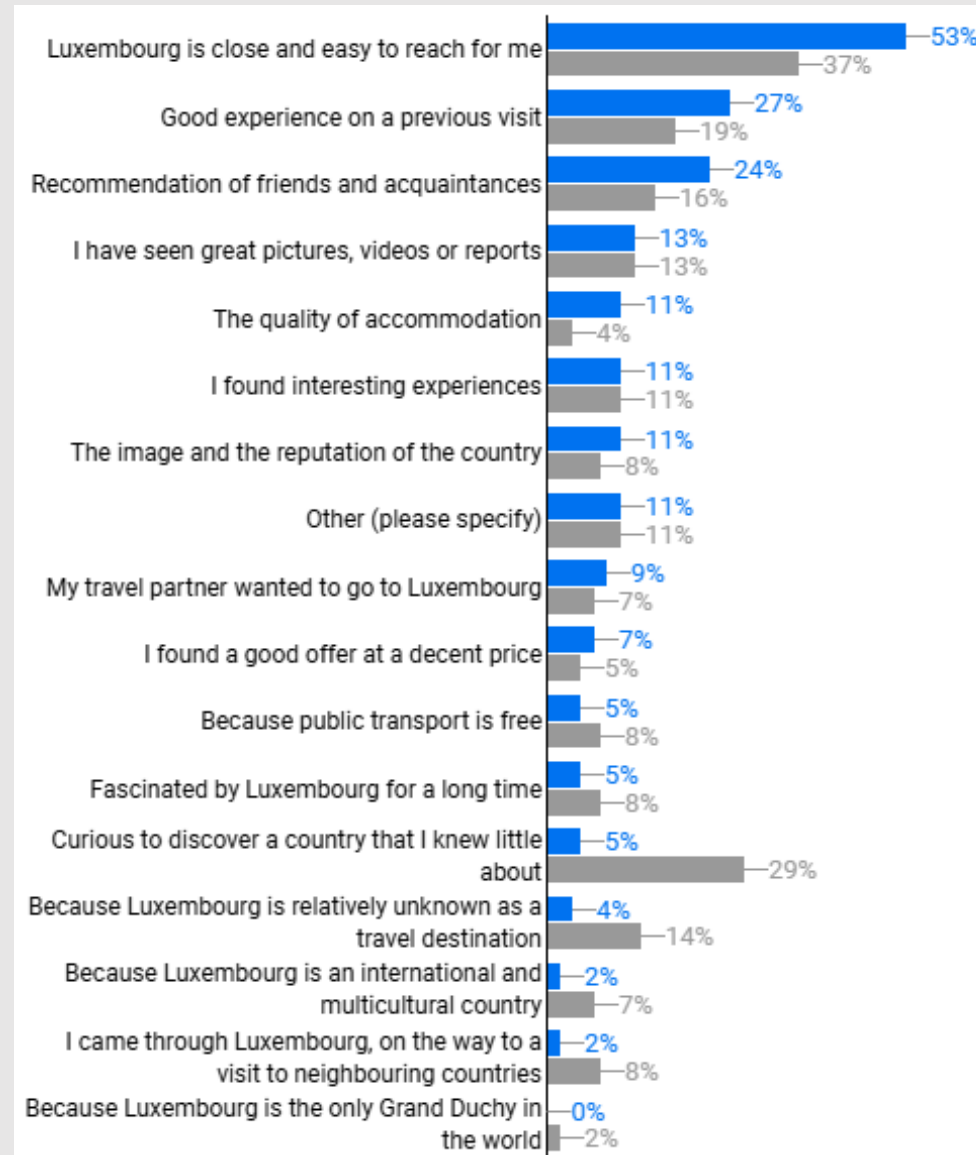
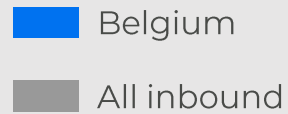


Additional holiday types



Key decision criteria for choosing Luxembourg

Inbound leisure visitors with overnight (*), 2023



Key travel motivations

Inbound leisure visitors with overnight, 2023



Belgium

All inbound

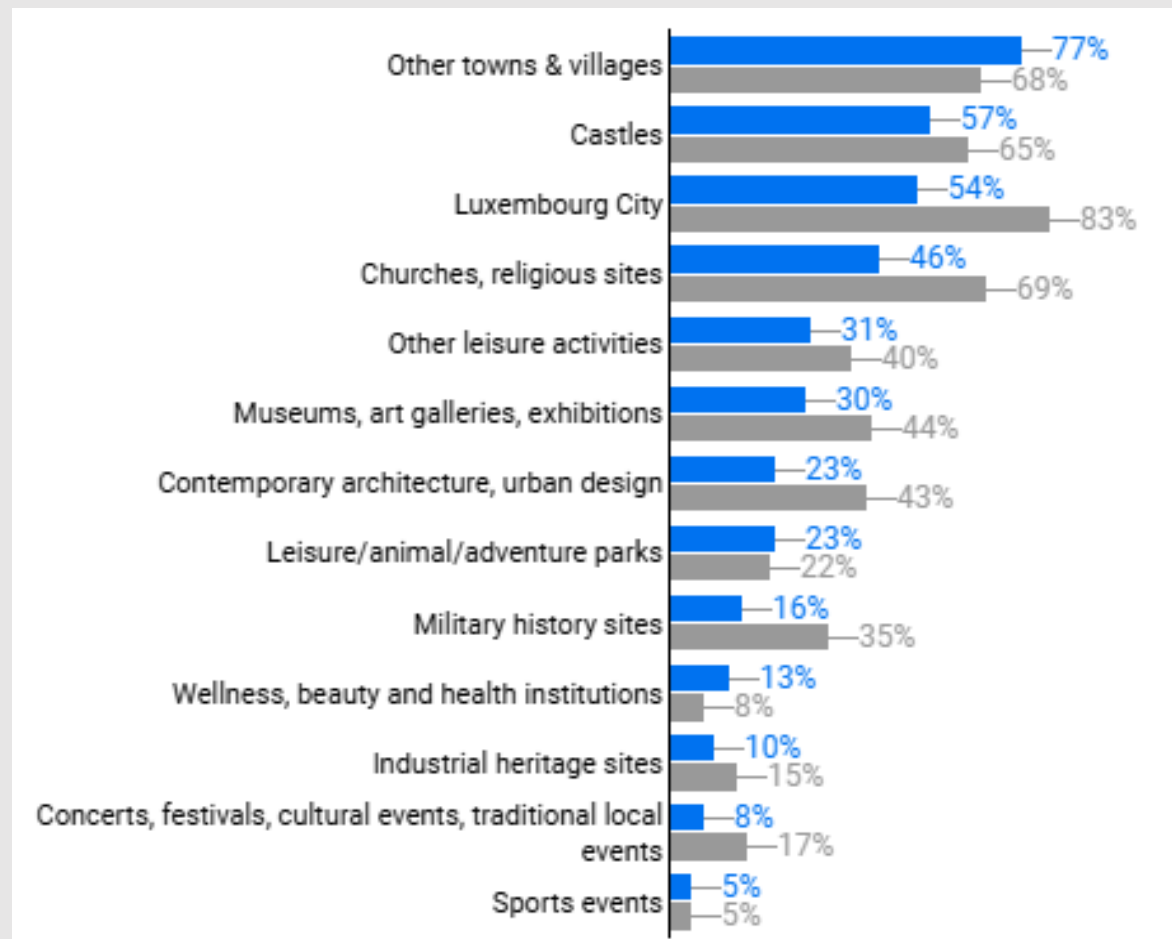


Type of places visited in Luxembourg

Inbound leisure visitors with overnight, 2023



■ Belgium ■ All inbound

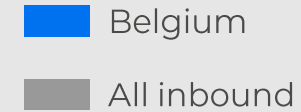


Activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023



Non-sporting activities



Sporting activities



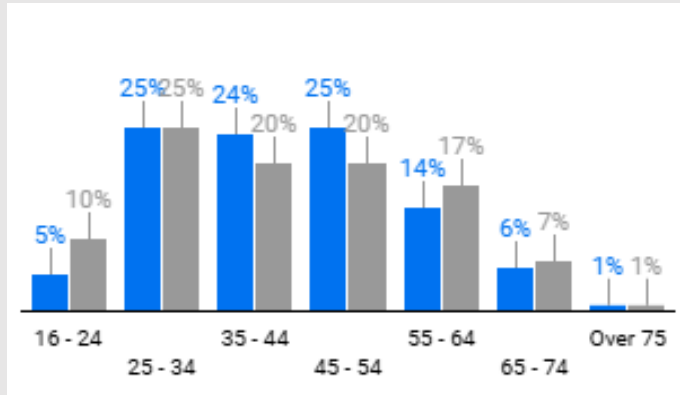
Transport, travel party, age, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2023

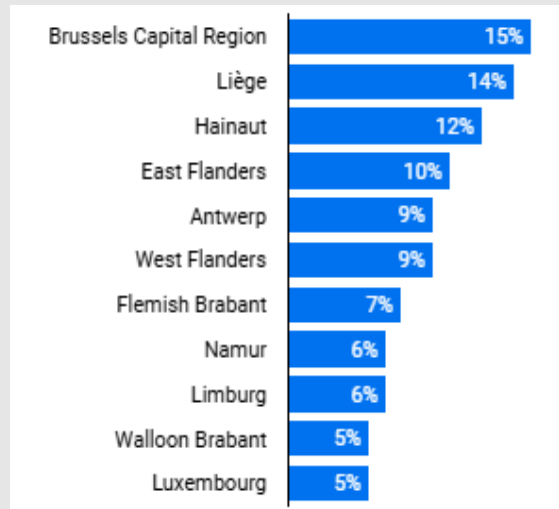


Belgium All inbound

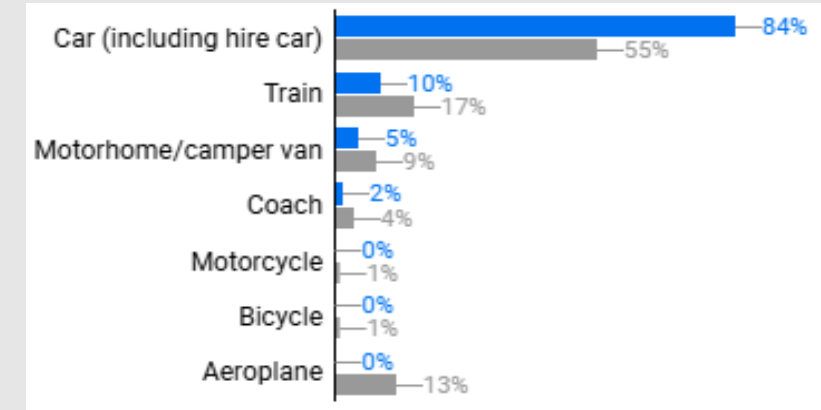
Age groups



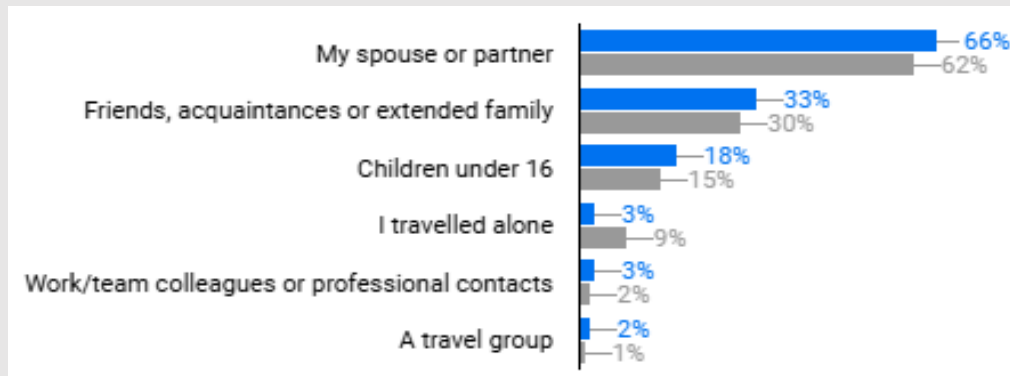
Region of origin



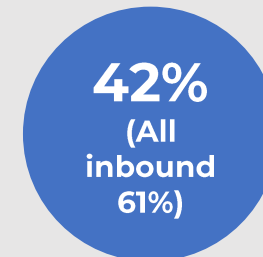
Mode of transport to access Luxembourg



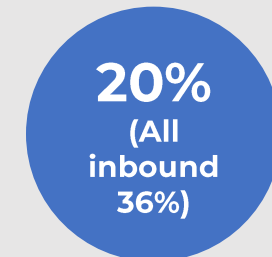
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

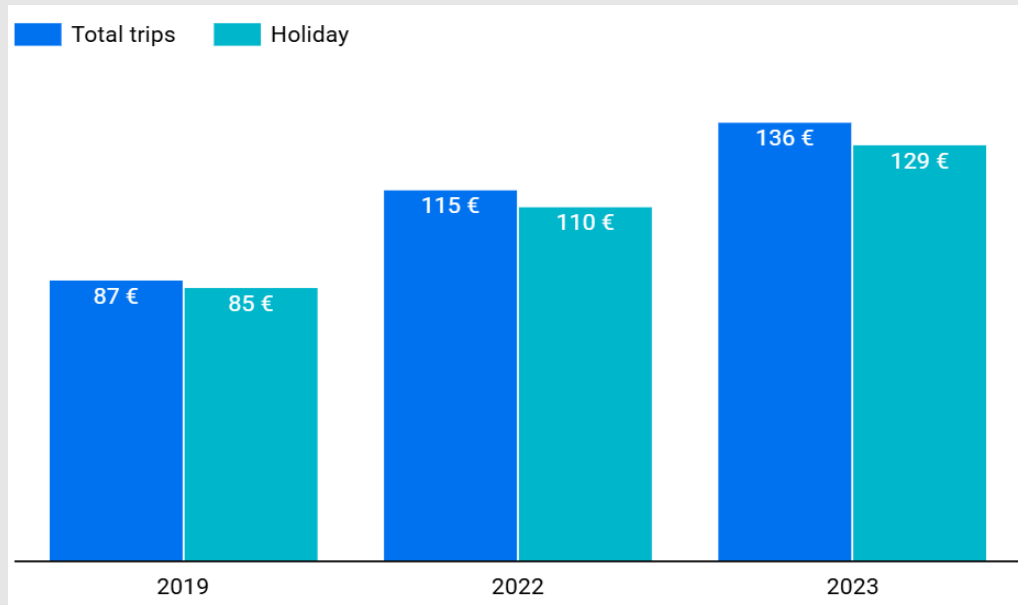


Expenditure

Inbound trips to Luxembourg with overnight



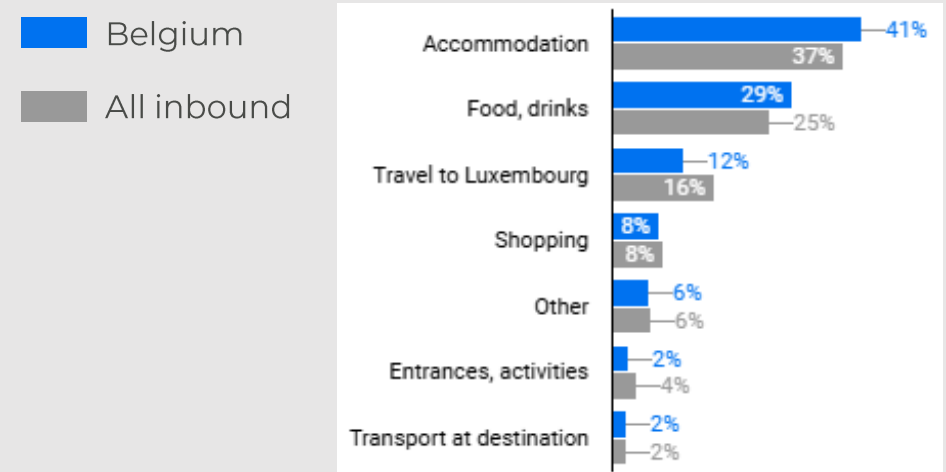
Belgian trips to Luxembourg : average spend per pers. per day



2023

	Belgium to Luxembourg	Europe to Luxembourg
Spend/day/pers. on all trips	136 €	152 €
Spend/day/pers. on holiday trips	129 €	144 €

Expenditure of leisure inbound overnight visitors by categories, 2023



Quality vs. price orientation

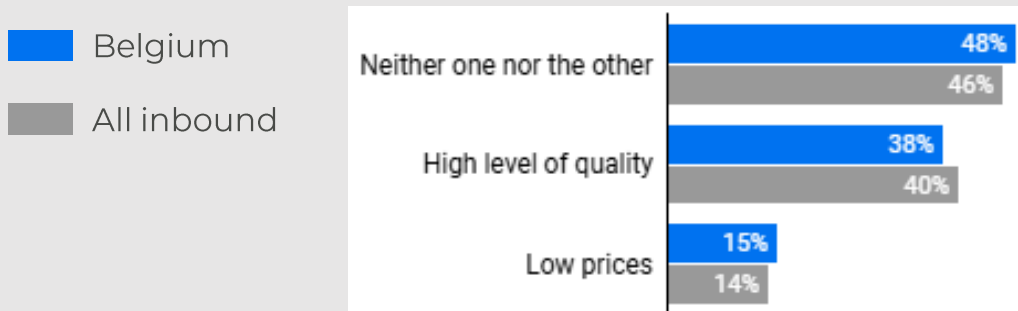
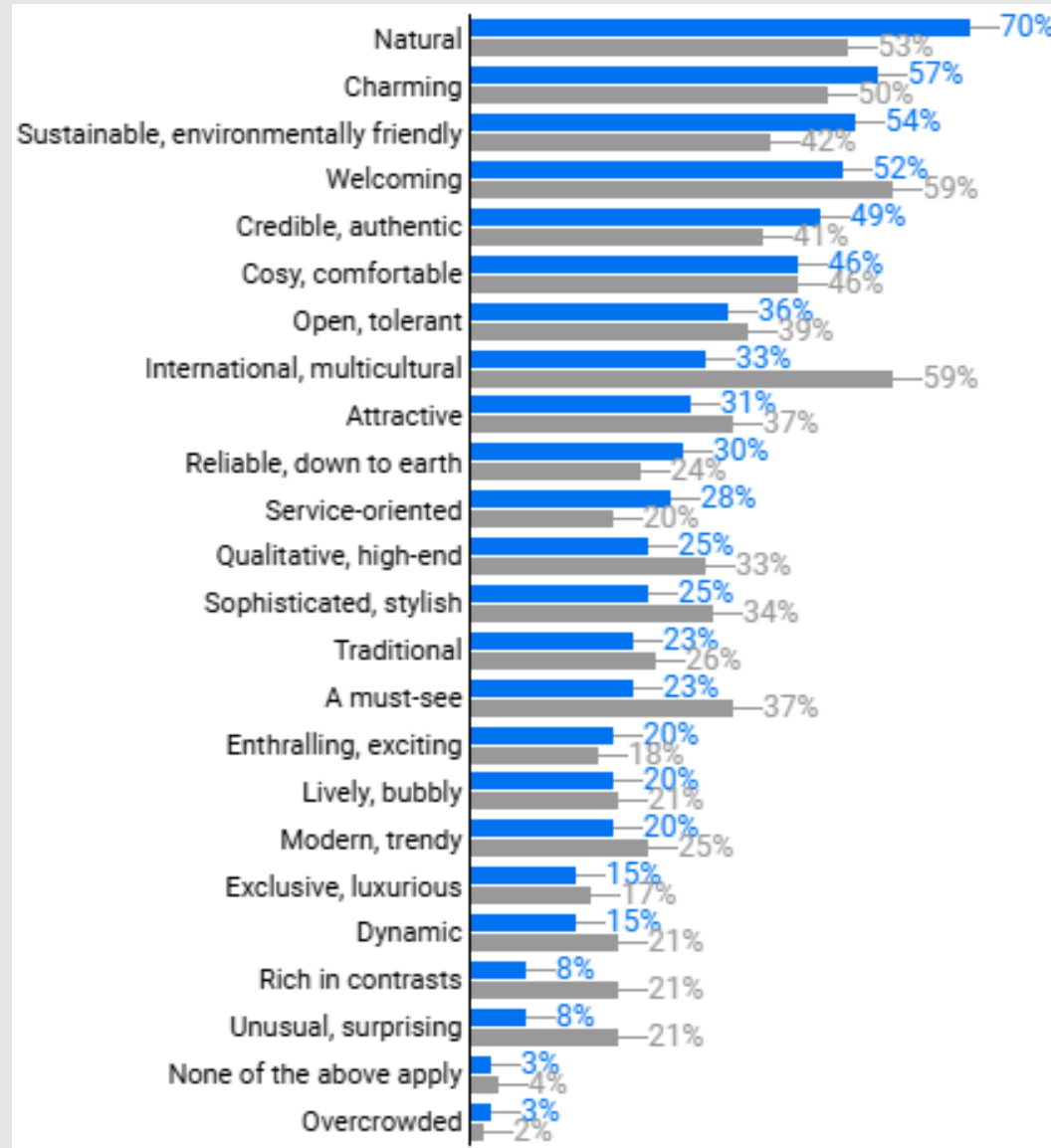


Image perception of Luxembourg

Inbound leisure visitors with overnight, 2023

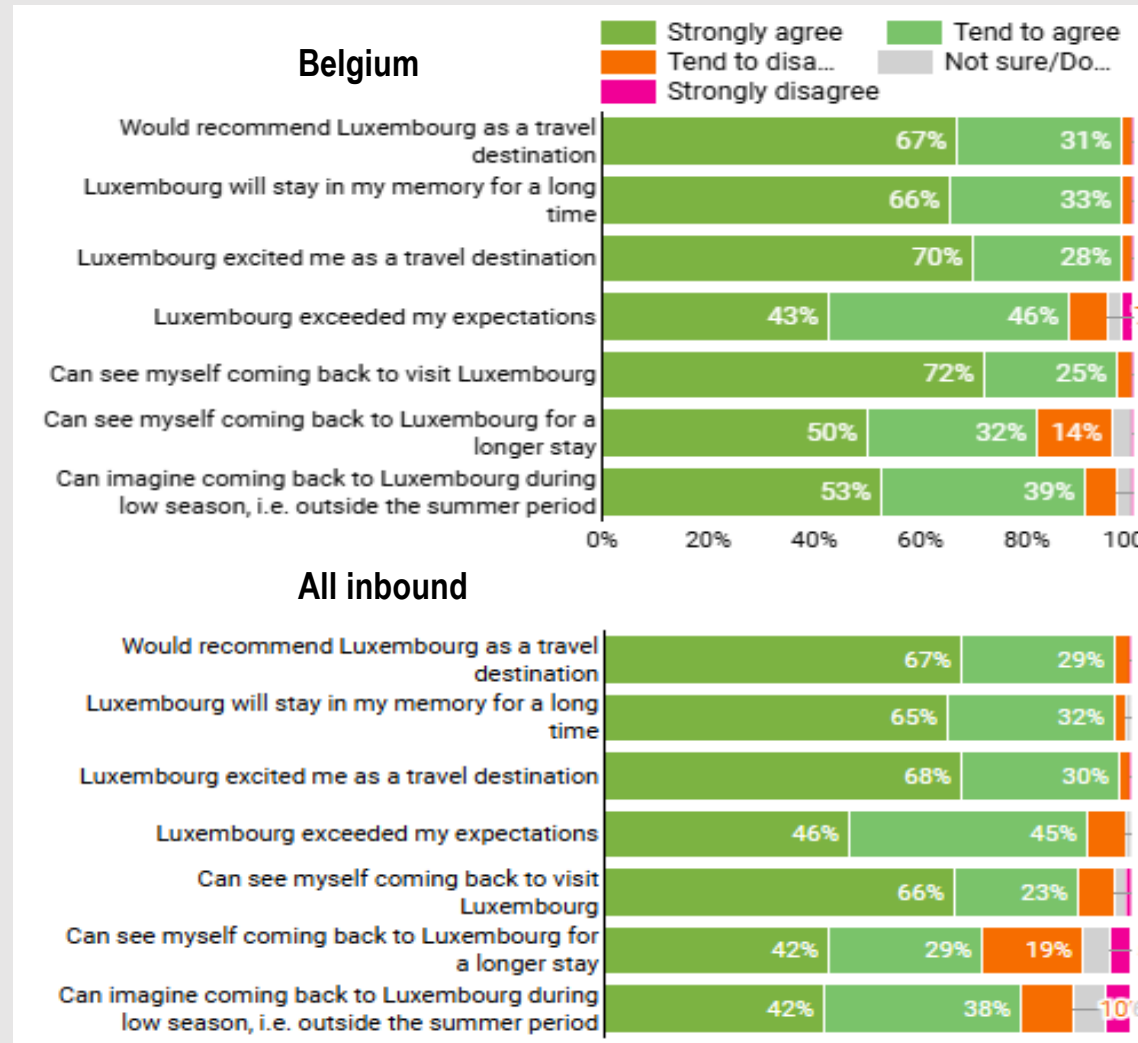


■ Belgium
■ All inbound



Visitor satisfaction and recommendation

Inbound leisure visitors with overnight, 2023



LFT Target Segments



Explorers



Nature-Loving Actives



Relaxation Seekers



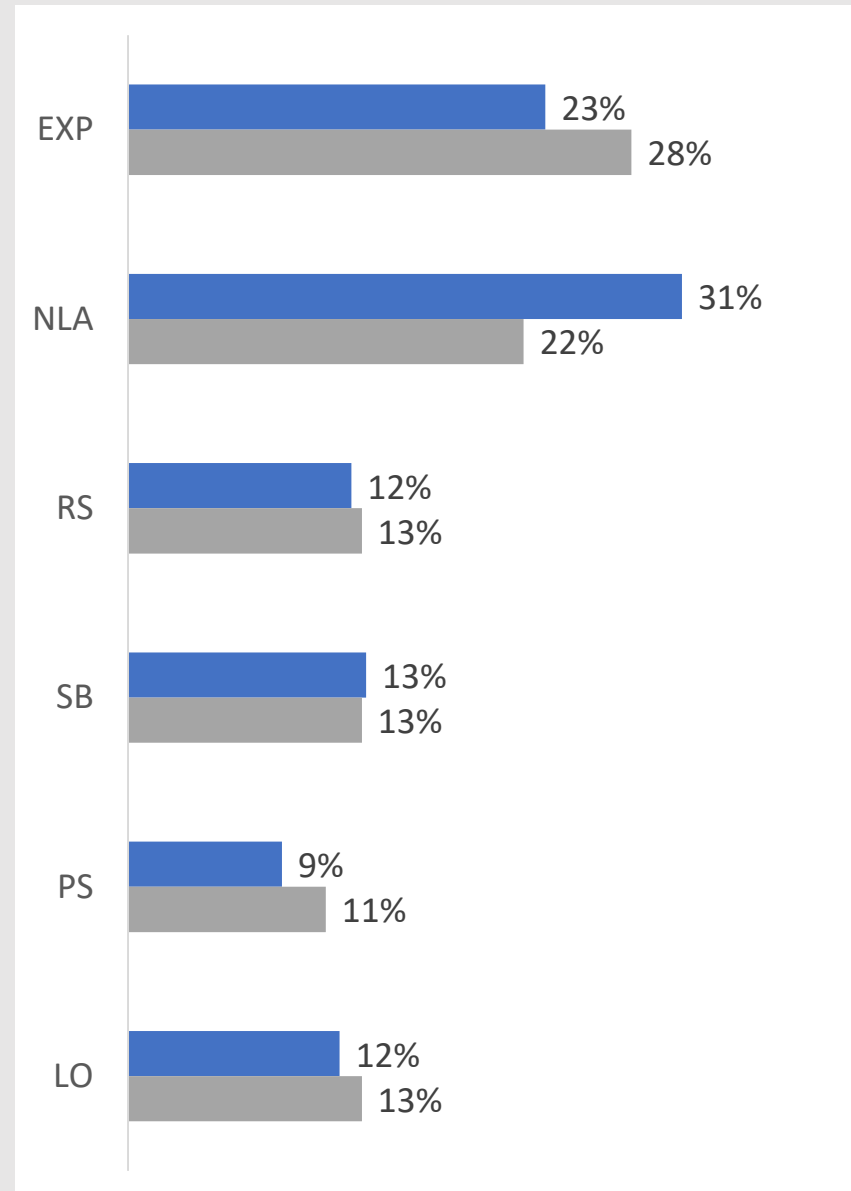
Short Breakers



Perfection Seekers



Leisure-Oriented



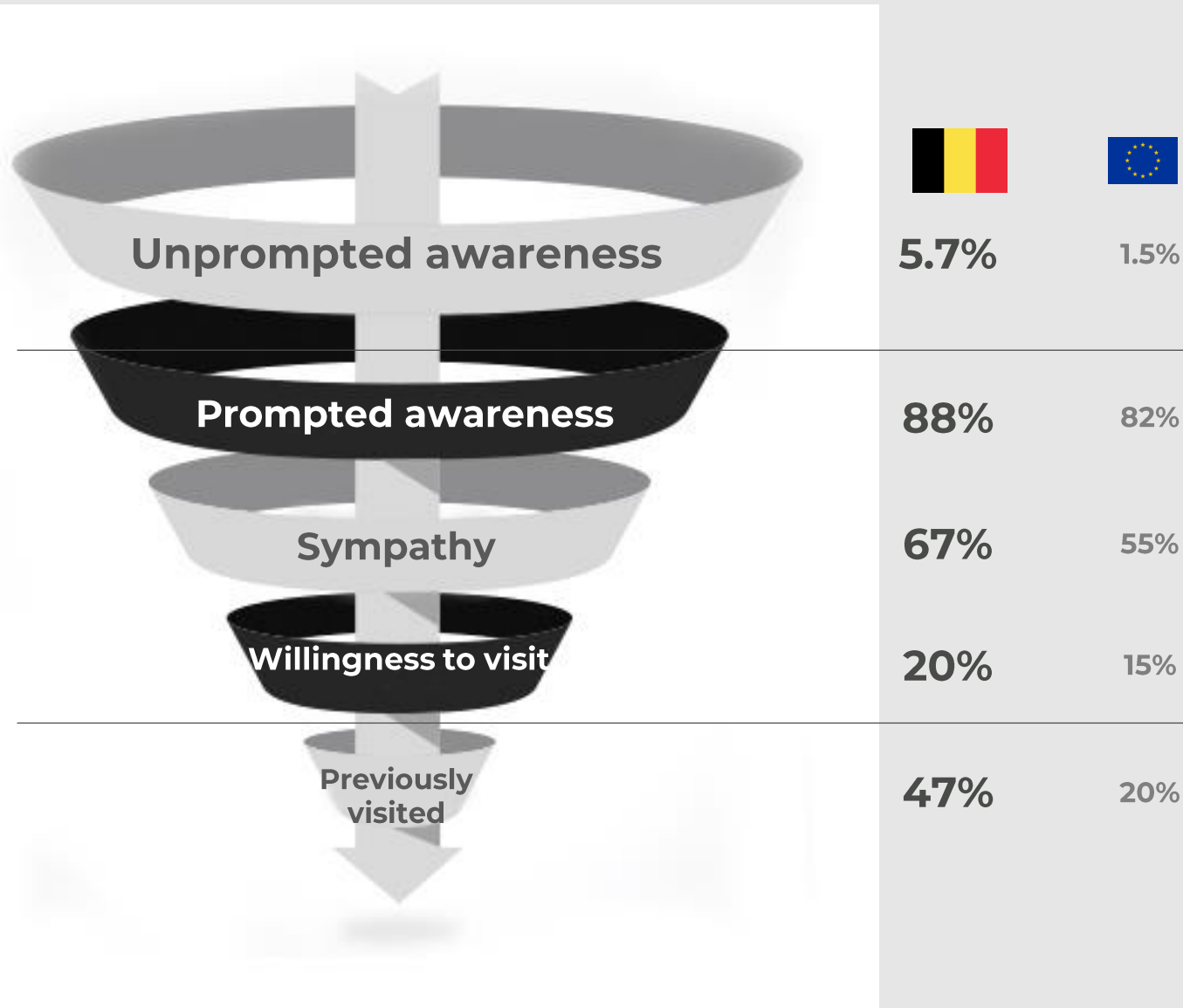
Belgium
All inbound



Brand strength & Growth potential

Brand Funnel 2024

Assessing Luxembourg's brand strength as a destination

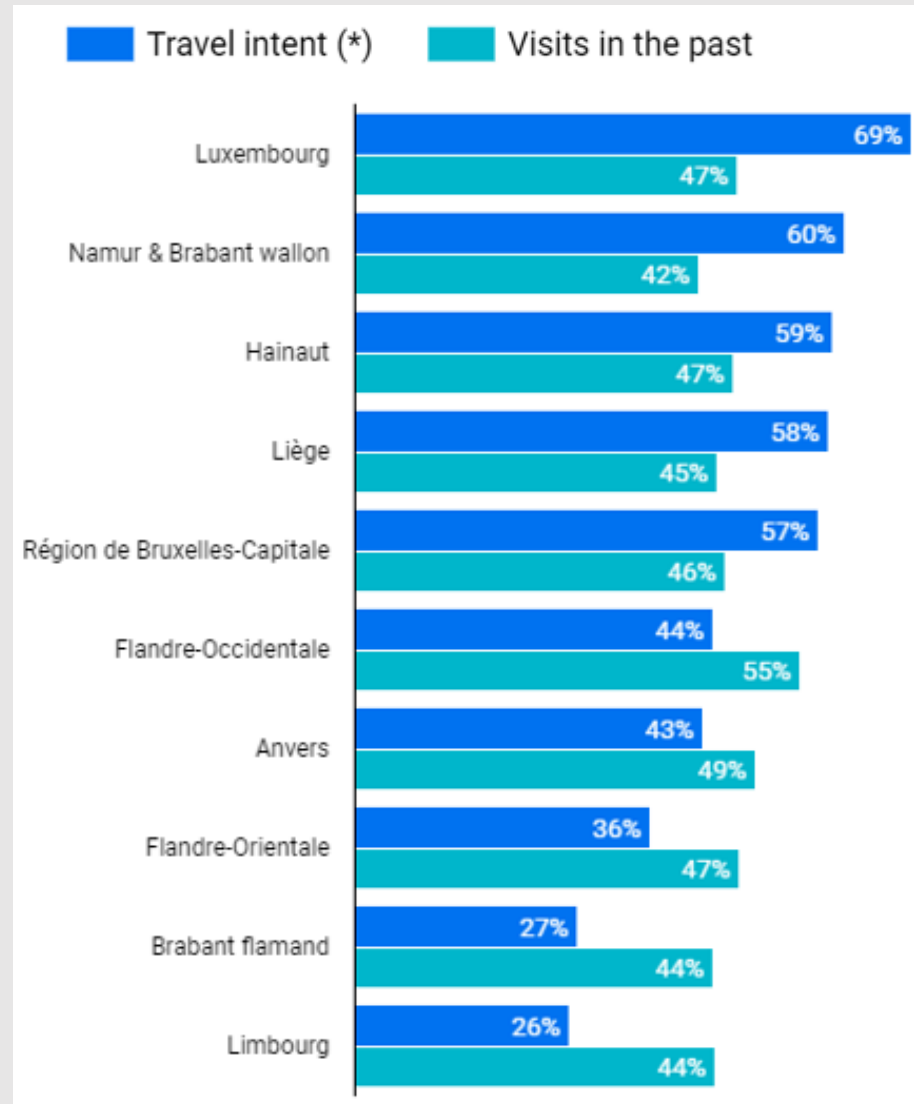


Core future visitor potential from Belgium (*)
1.7 million

Source: LFT Brand & Potential Study.
(*) Based on travel intent for next 3 years.




Regional origin 2024

Past visitors and future potential



General theme interest (*)



Theme			
	Rank	Rank	% interested
Nature	3	1	73%
Resting/Relaxation	1	2	73%
Culinary	2	3	71%
Sightseeing	4	4	68%
Family	12	5	66%
Fun/entertainment	8	6	64%
Architecture/townscapes	7	7	64%
Immersive travel	6	8	64%
City	5	9	62%
Hiking	17	10	60%
Learning/new skills	14	11	57%
History/Unesco	10	12	57%
Castles	9	13	56%
Exchanging with locals	13	14	55%
Culture	11	15	54%
Sustainability	15	16	54%
Events	16	17	50%
Adventure/action	19	18	49%
Shopping	23	19	46%
Countryside	22	20	46%
Wine	21	21	44%
Remembrance	26	22	43%
Travelling by train	18	23	42%
Nightlife (**)	20	24	41%
Cycling	31	25	41%
Active-sports	27	26	40%
Luxury	24	27	40%
Wellness	25	28	38%
Industrial heritage	28	29	37%
Film locations	30	30	37%
Camping	29	31	35%
MTB	32	32	25%
Motorcycling	33	33	22%




(*) 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.

(**) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters).

Luxembourg's Theme Competence (*)



Theme	 Rank	 Rank	 % agreeing
Nature	5	1	57%
Hiking	11	2	51%
Resting/Relaxation	2	3	39%
Family	8	4	37%
Castles	7	5	36%
Culinary	3	6	34%
City	1	7	31%
Architecture/townscapes	4	8	30%
Cycling	20	9	26%
Shopping	10	10	25%
Culture	6	11	25%
Camping	19	12	25%
Wine	15	13	24%
Countryside	17	14	24%
MTB	25	15	24%
Active-sports	21	16	24%
History/Unesco	12	17	23%
Luxury	9	18	22%
Adventure/action	22	19	21%
Fun/entertainment	13	20	20%
Sustainability	18	21	19%
Wellness	16	22	17%
Remembrance	26	23	14%
Industrial heritage	24	24	14%
Nightlife (***)	14	25	12%
Events	23	26	12%

Growth potential for themes (**)

- Resting/relaxation
- Culinary
- City
- Culture & Events
- Architecture/townscapes
- History/Unesco
- Fun/entertainment
- Sustainability
- Nightlife




(*) 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 general theme interest in the source market, and to the theme suitability perception across other source markets (European average).

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
clean	2	1	45%
safe	1	2	42%
welcoming, hospitable	4	3	35%
authentic, real	5	4	34%
of high quality	3	5	31%
attractive, appealing	7	6	28%
open-minded, tolerant, international	6	7	24%
varied, diversified	12	8	22%
surprising	11	8	22%
affordable	16	10	21%
exclusive, luxurious	8	11	21%
service oriented	10	12	20%
not overcrowded / insider tip	14	13	20%
dynamic, modern	9	14	18%
sustainable	15	15	18%
lively, trendy	13	16	15%

(*) 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.



Your contact

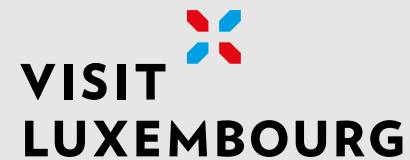


Alain Krier

Head of Insights & Strategy

T. +352 42 82 82 36

alain.krier@LfT.lu



Luxembourg for Tourism GIE
6, rue Antoine de Saint-Exupéry
L-1432 Luxembourg-Kirchberg
www.visitluxembourg.com