Luxembourg for Tourism

Market profile

DENMARK & SWEDEN

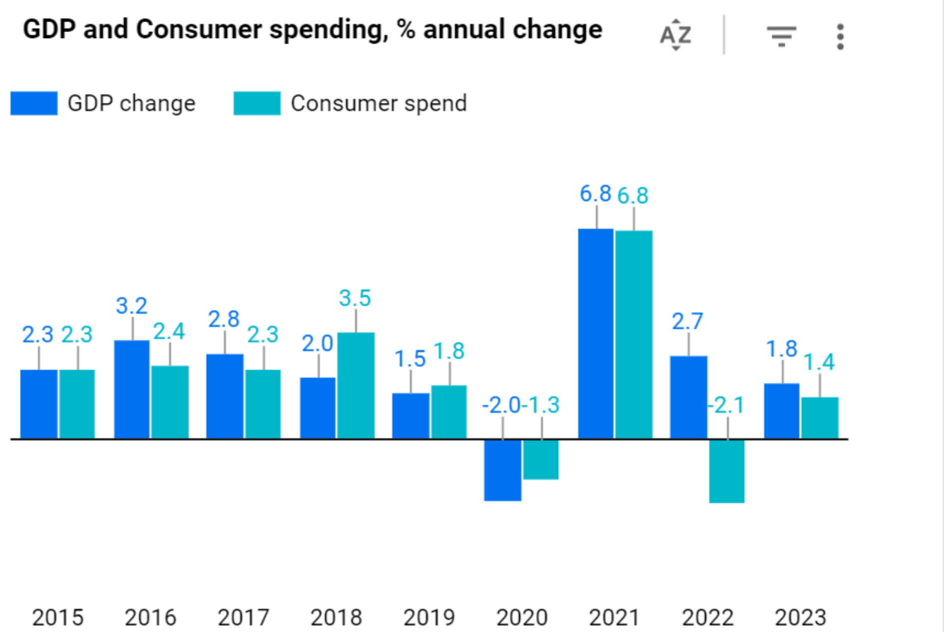
2023

Economic indicators & General Travel Demand

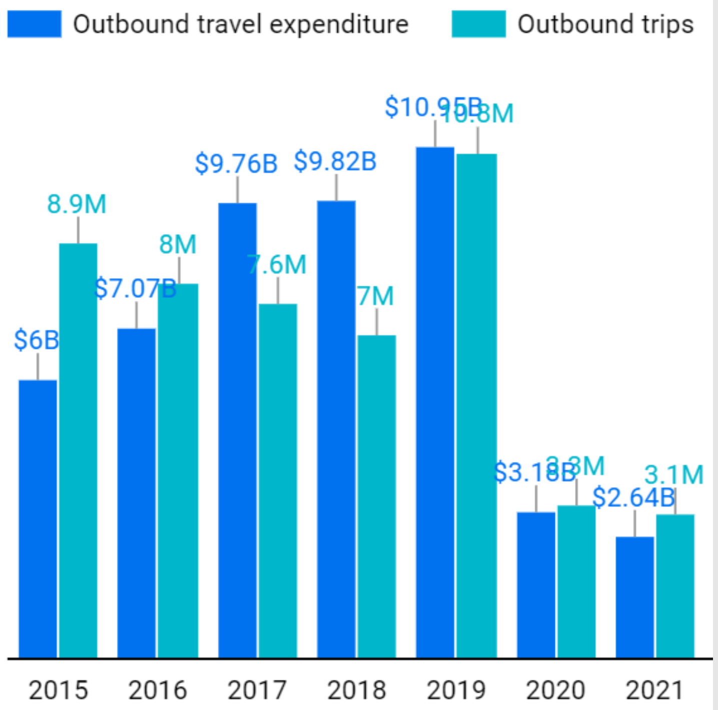
Economic indicators - General travel demand

Economy & population

GDP ($) per capita	Unemployment (%)	Population (mn)	Inflation (%)
68,300	4.9	5.9	3.4

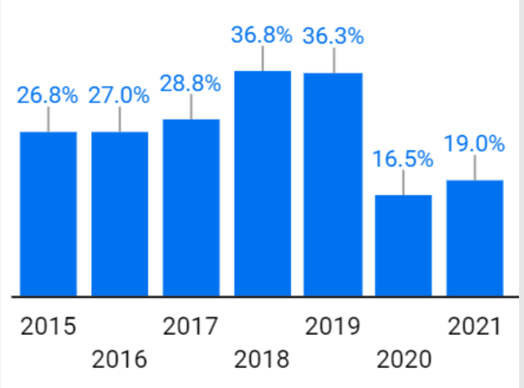


Outbound trips and travel expenditure

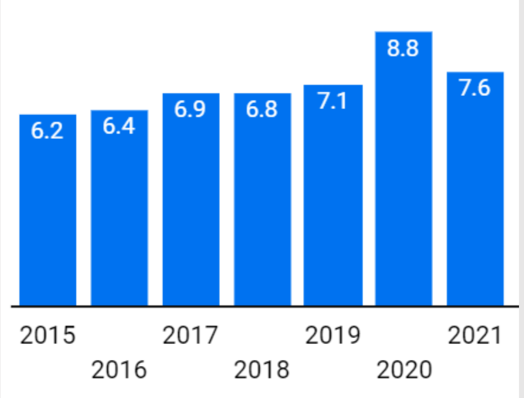


Average spend per outbound trip (2019)
1.014 $

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of short trips (1-3 nights), % all outbound trips (2021)
31.2%

Outbound travel intensity
1.86 trips
per inhabitant (2019)

Share of leisure, % all outbound trips (2021)
90.4%

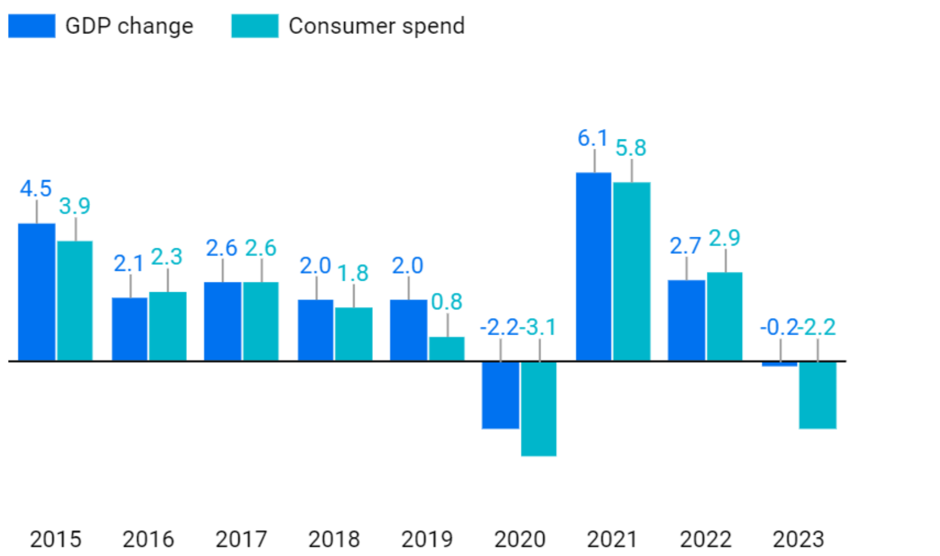
Sources: Eurostat, IMF.

Economic indicators - General travel demand

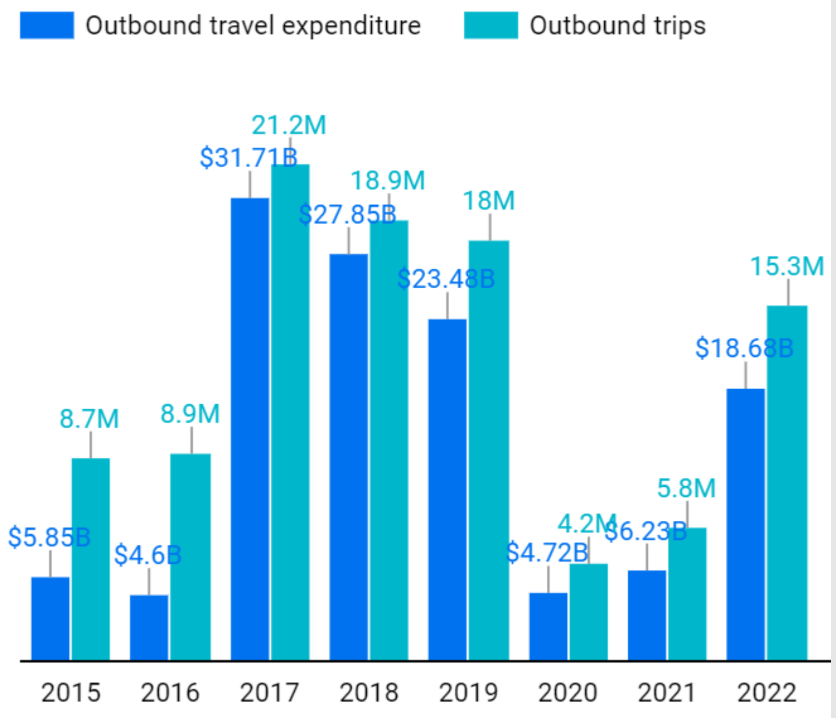
Economy & population

GDP ($) per capita	Unemployment (%)	Population (mn)	Inflation (%)
56,225	7.7	10.6	5.9

GDP and Consumer spending, % annual change

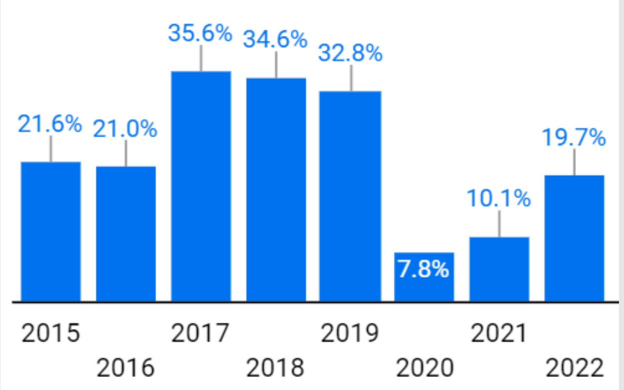


Outbound trips and travel expenditure

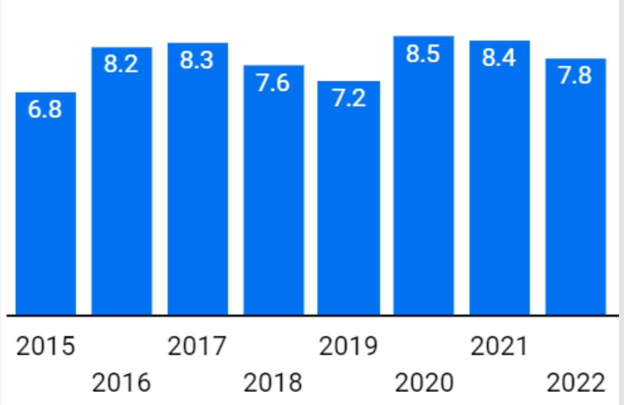


Average spend
per outbound trip (2019)
1.305 $

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of short trips (1-3 nights), % all outbound trips (2022)
30.0%

Outbound travel intensity
1.74 trips
per inhabitant (2019)

Share of leisure, % all outbound trips (2022)
84.4%

Sources: Eurostat, IMF.

Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation

2023

Nights,
paid accommodation, 2023

16.658

-16% (vs. 2022)
+15% (vs. 2019)

Arrivals,
paid accommodation, 2023

7.652

-3% (vs. 2022)
+25% (vs. 2019)

Average length of stay,
paid accommodation, 2023

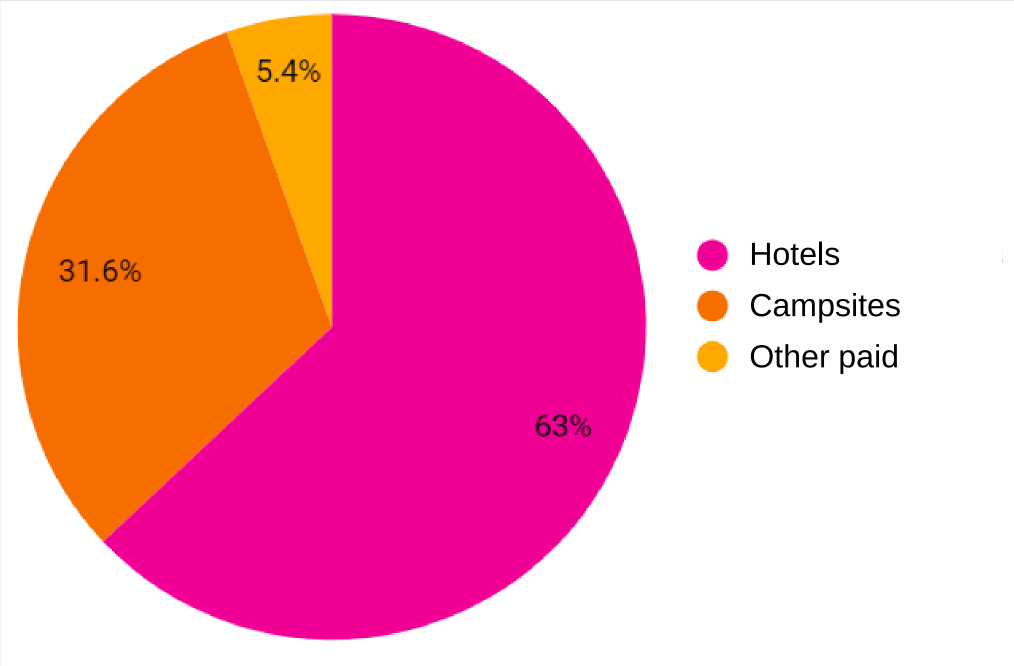
2.18
days

-0.33 days (vs. 2022)
-0.19 days (vs. 2019)

Source: Statec

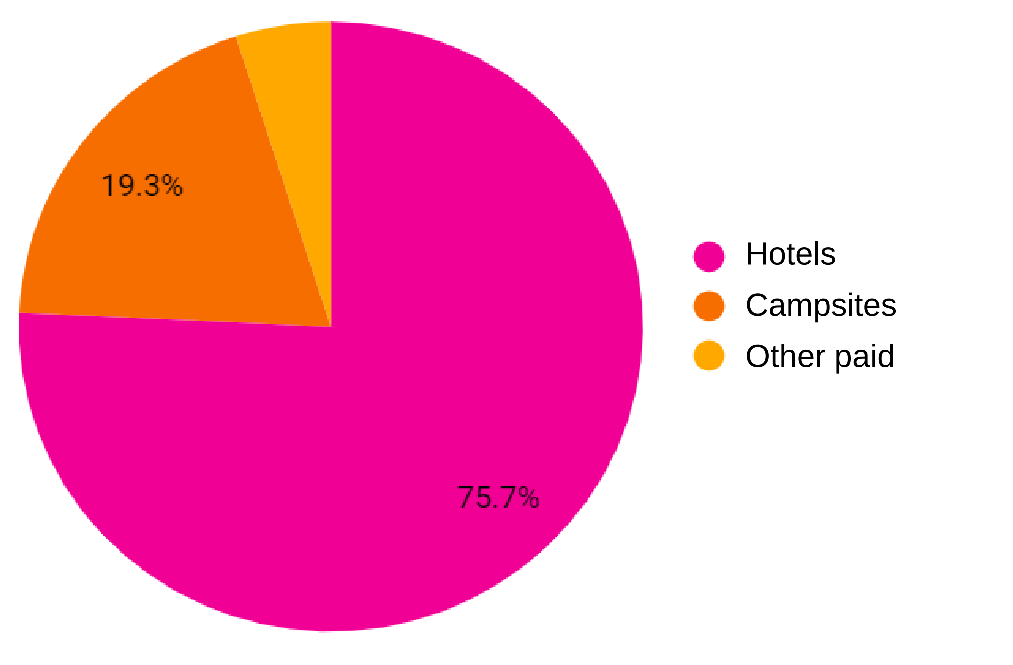
Nights & arrivals in paid accommodation
Type of accommodation, 2023

Nights, paid accommodation, 2023



Hotels	**10.489**	+4% (vs. 2022)	+30% (vs. 2019)
Campsites	**5.265**	-38% (vs. 2022)	-1% (vs. 2019)
Other paid accomm.	**904**	-21% (vs. 2022)	-20% (vs. 2019)

Arrivals, paid accommodation, 2023



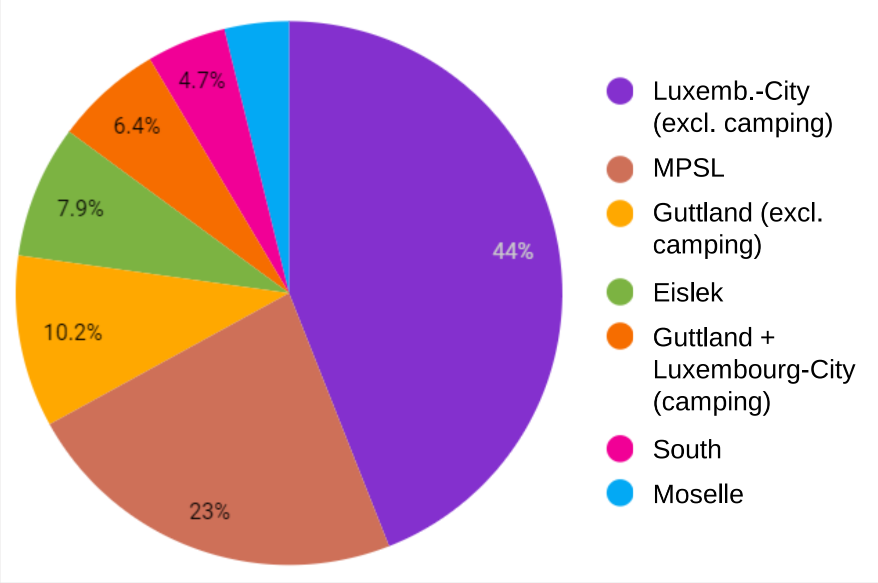
Hotels	**5.795**	+8% (vs. 2022)	+31% (vs. 2019)
Campsites	**1.480**	-27% (vs. 2022)	+4% (vs. 2019)
Other paid accomm.	**377**	-22% (vs. 2022)	+37% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

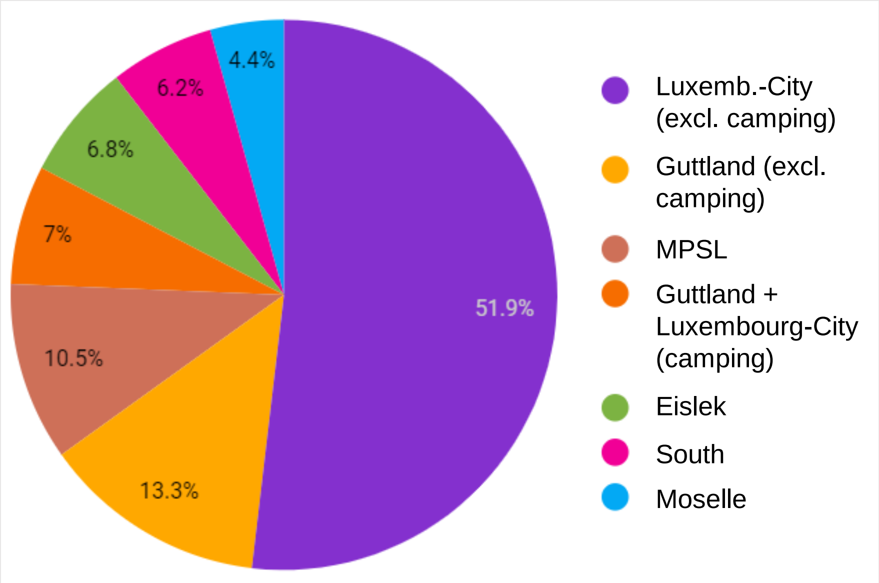
Regions, 2023

Nights, paid accommodation, 2023



Lux.-City (excl. camping)	**7.335**	-2% (vs. 2022)	+23% (vs. 2019)
MPSL	**3.824**	-43% (vs. 2022)	-5% (vs. 2019)
Guttland (excl. camping)	**1.704**	+6% (vs. 2022)	+39% (vs. 2019)
Eislek	**1.316**	-21% (vs. 2022)	+34% (vs. 2019)
Guttland/Lux.-City (camping)	**1.062**	+20% (vs. 2022)	+27% (vs. 2019)
South	**782**	-4% (vs. 2022)	-12% (vs. 2019)
Moselle	**635**	+1% (vs. 2022)	+11% (vs. 2019)

Arrivals, paid accommodation, 2023



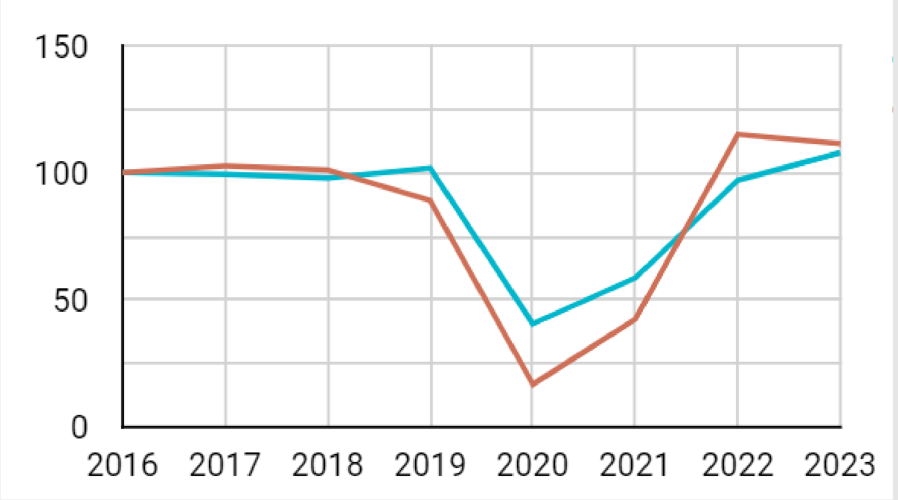
Lux.-City (excl. camping)	**3.969**	+2% (vs. 2022)	+38% (vs. 2019)
Guttland (excl. camping)	**1.015**	+10% (vs. 2022)	+32% (vs. 2019)
MPSL	**803**	-39% (vs. 2022)	-3% (vs. 2019)
Guttland/Lux.-City (camping)	**536**	+16% (vs. 2022)	+11% (vs. 2019)
Eislek	**524**	-7% (vs. 2022)	+28% (vs. 2019)
South	**471**	-2% (vs. 2022)	-22% (vs. 2019)
Moselle	**334**	+6% (vs. 2022)	+32% (vs. 2019)

Source: Statec

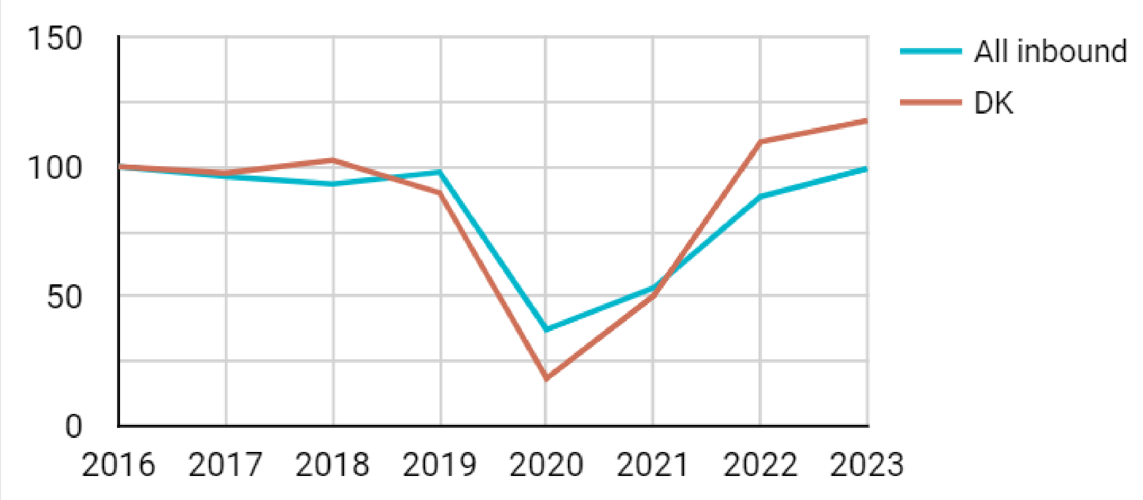
Arrivals in paid accommodation

Trends 2016-2023

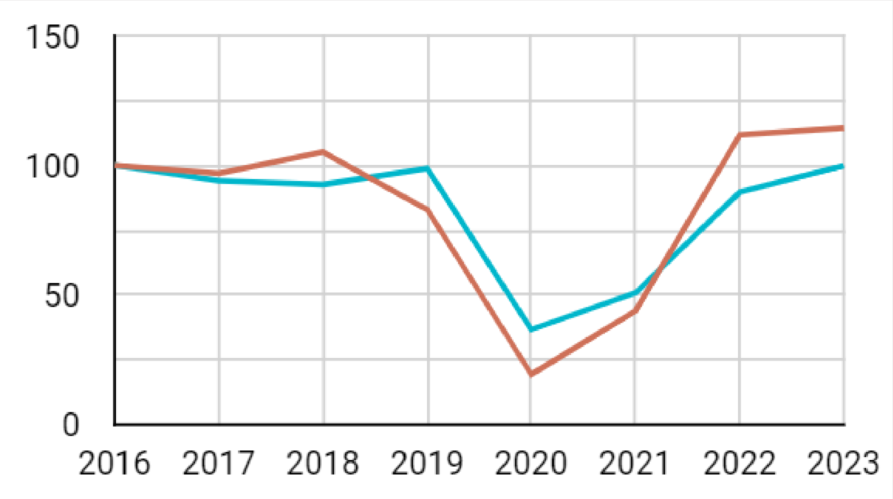
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



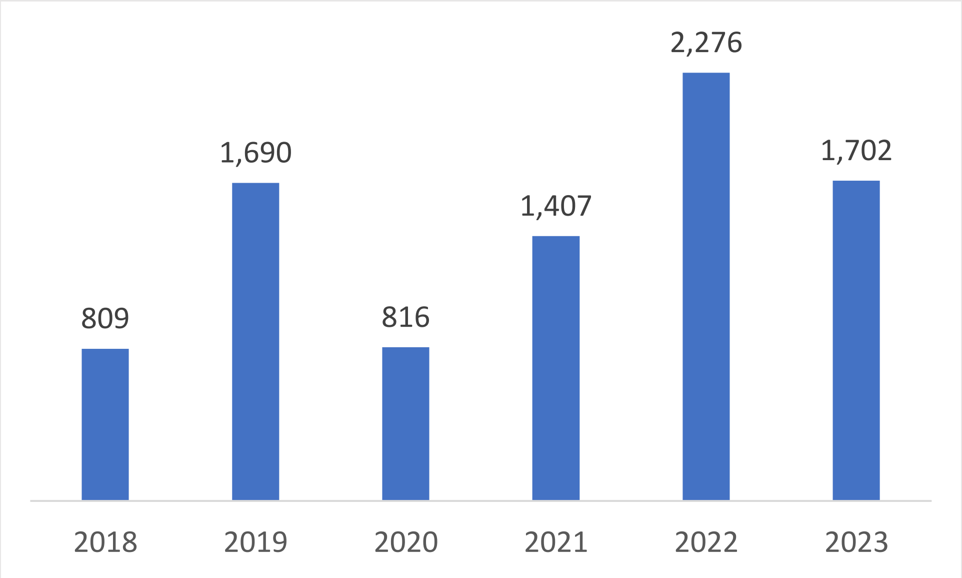
(*) excluding camping.
Source: Statec

Short-term rentals

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

+27% (vs. 2022)
+41% (vs. 2019)

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



Source: Eurostat (experimental statistics).

Nights, arrivals & length of stay in paid accommodation

2023

Nights, paid accommodation, 2023

11.573

-7% (vs. 2022)
+6% (vs. 2019)

Arrivals, paid accommodation, 2023

6.577

-2% (vs. 2022)
+4% (vs. 2019)

Average length of stay, paid accommodation, 2023

1.76 days

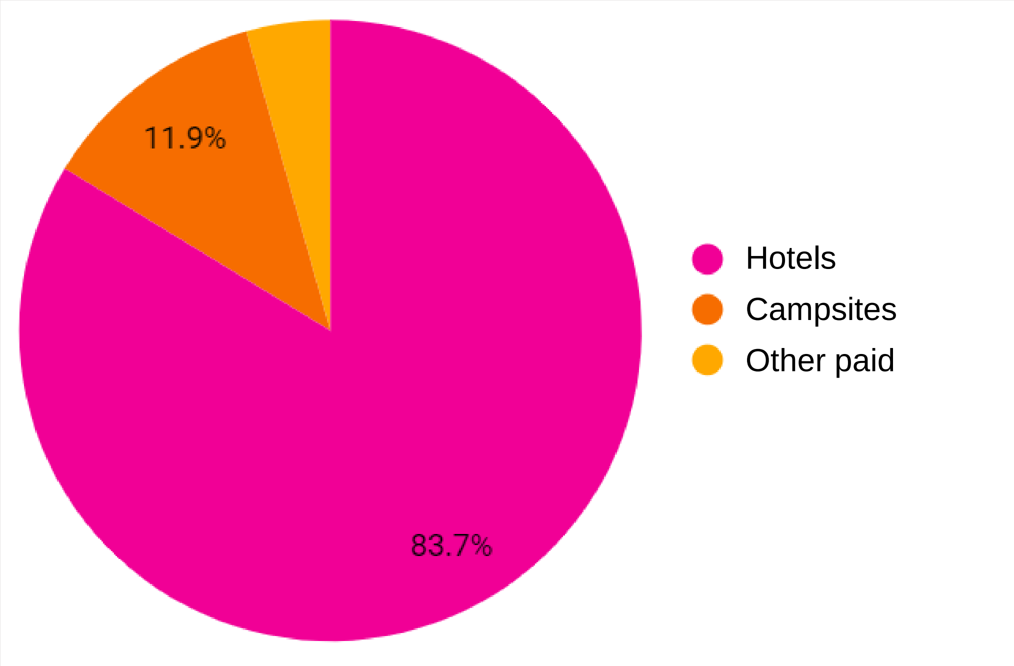
-0.09 days (vs. 2022)
+0.03 days (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

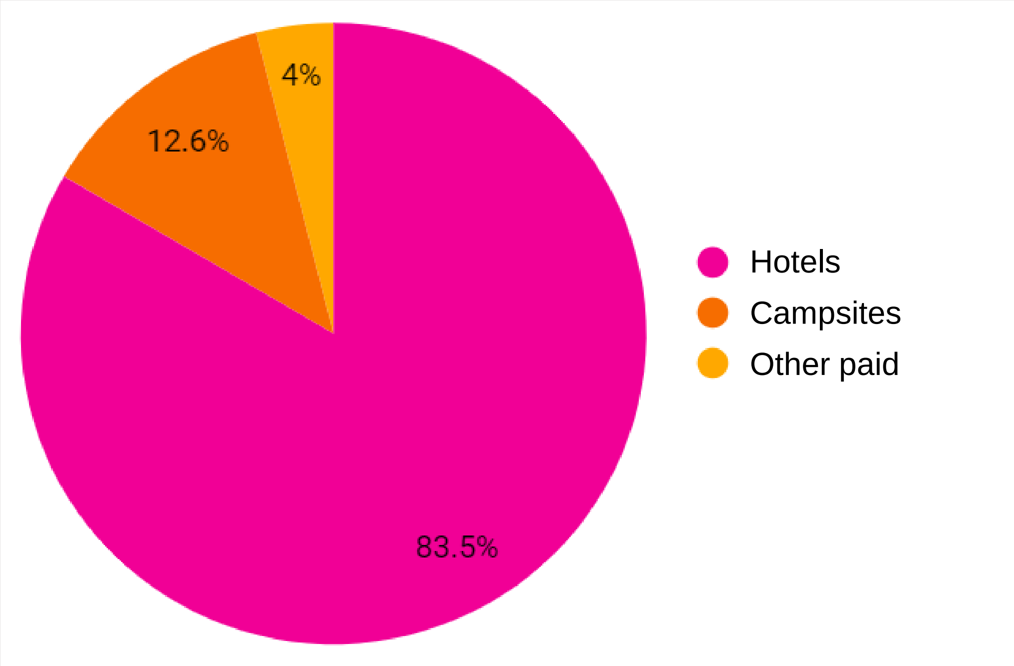
Type of accommodation, 2023

Nights, paid accommodation, 2023



Hotels	9.690	-10% (vs. 2022)	+8% (vs. 2019)
Campsites	1.379	+8% (vs. 2022)	+15% (vs. 2019)
Other paid accomm.	504	+65% (vs. 2022)	-32% (vs. 2019)

Arrivals, paid accommodation, 2023



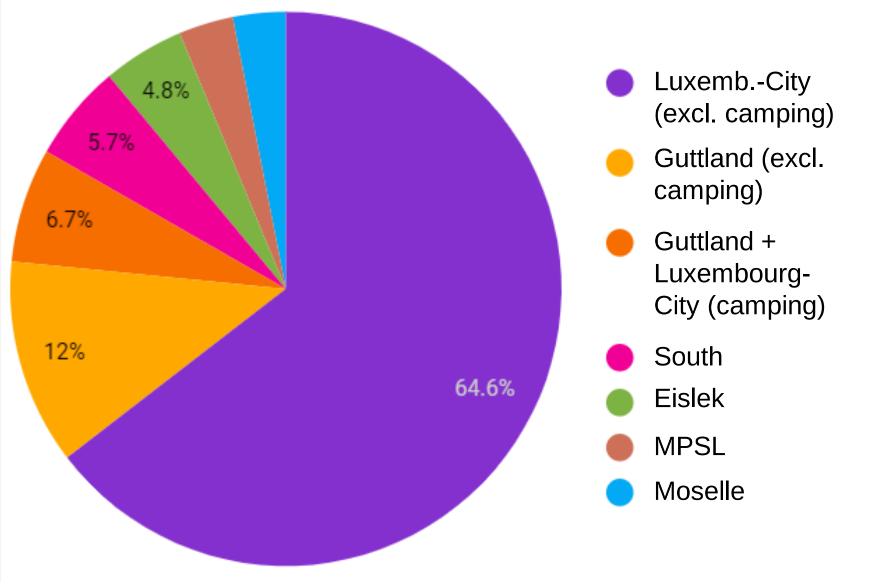
Hotels	5.489	-4% (vs. 2022)	+3% (vs. 2019)
Campsites	826	+5% (vs. 2022)	+4% (vs. 2019)
Other paid accomm.	262	+43% (vs. 2022)	+18% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

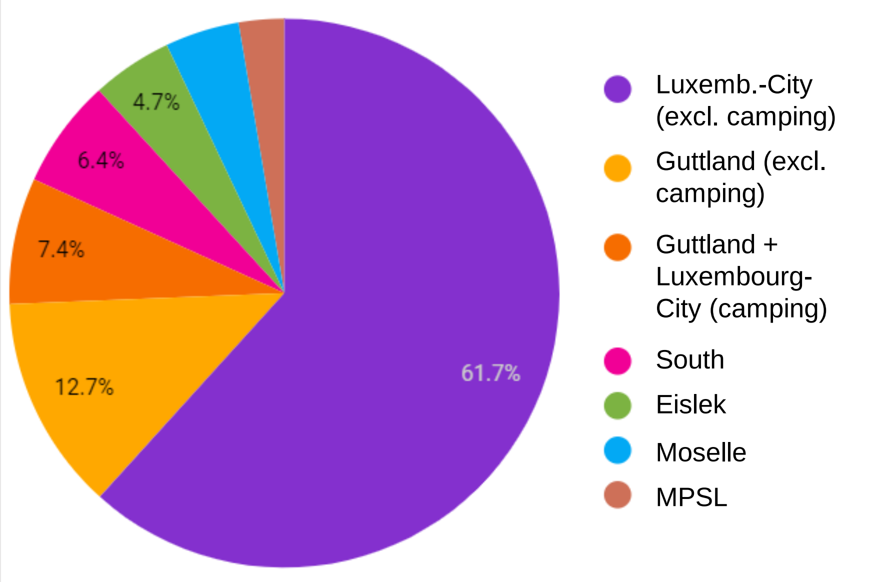
Regions, 2023

Nights, paid accommodation, 2023



Lux.-City (excl. camping)	7.476	-5% (vs. 2022)	+4% (vs. 2019)
Guttland (excl. camping)	1.387	-24% (vs. 2022)	+25% (vs. 2019)
Guttland/Lux.-City (camping)	772	+17% (vs. 2022)	+10% (vs. 2019)
South	656	-13% (vs. 2022)	-24% (vs. 2019)
Eislek	553	+50% (vs. 2022)	+19% (vs. 2019)
MPSL	371	-19% (vs. 2022)	+20% (vs. 2019)
Moselle	358	-18% (vs. 2022)	+10% (vs. 2019)

Arrivals, paid accommodation, 2023



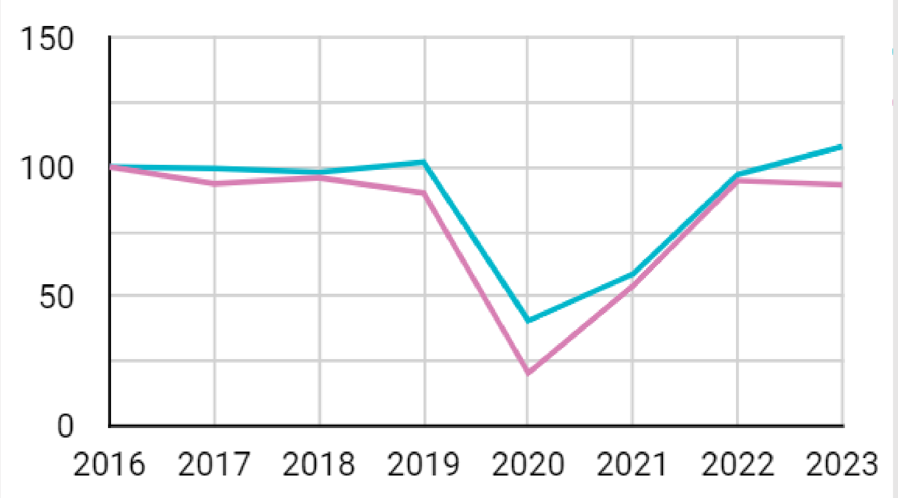
Lux.-City (excl. camping)	4.059	-2% (vs. 2022)	+4% (vs. 2019)
Guttland (excl. camping)	832	-15% (vs. 2022)	+9% (vs. 2019)
Guttland/Lux.-City (camping)	489	+8% (vs. 2022)	+4% (vs. 2019)
South	422	+3% (vs. 2022)	-16% (vs. 2019)
Eislek	312	+22% (vs. 2022)	+5% (vs. 2019)
Moselle	287	+26% (vs. 2022)	+44% (vs. 2019)
MPSL	176	-23% (vs. 2022)	-11% (vs. 2019)

Source: Statec

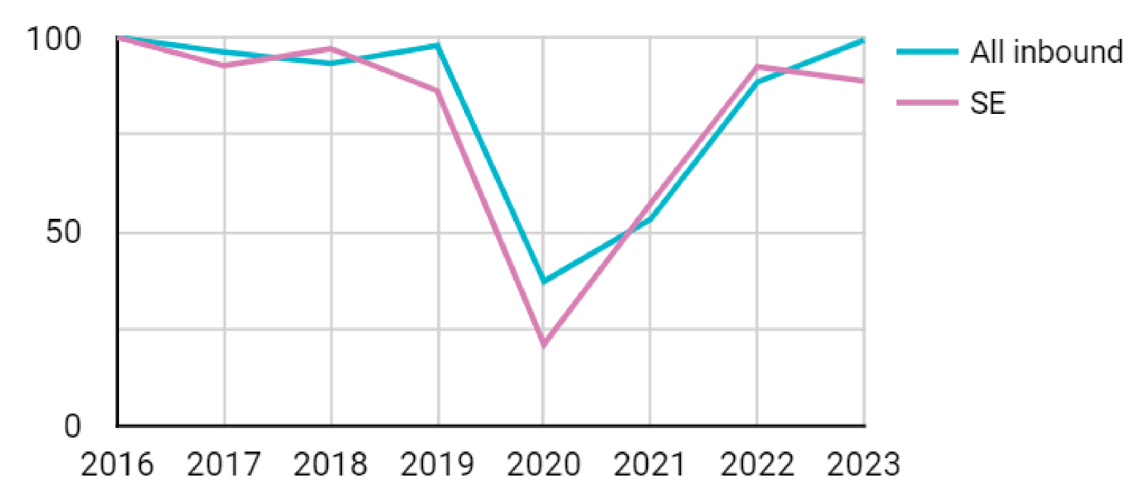
Arrivals in paid accommodation

Trends 2016-2023

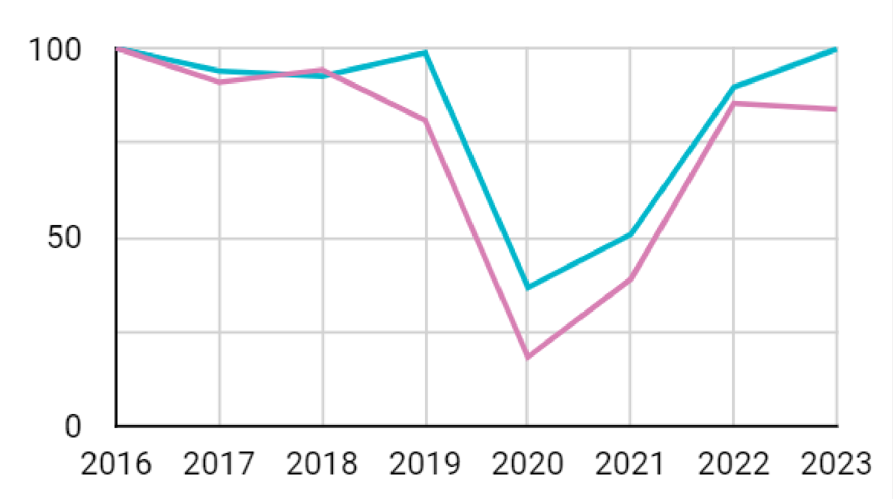
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



(*) excluding camping.
Source: Statec

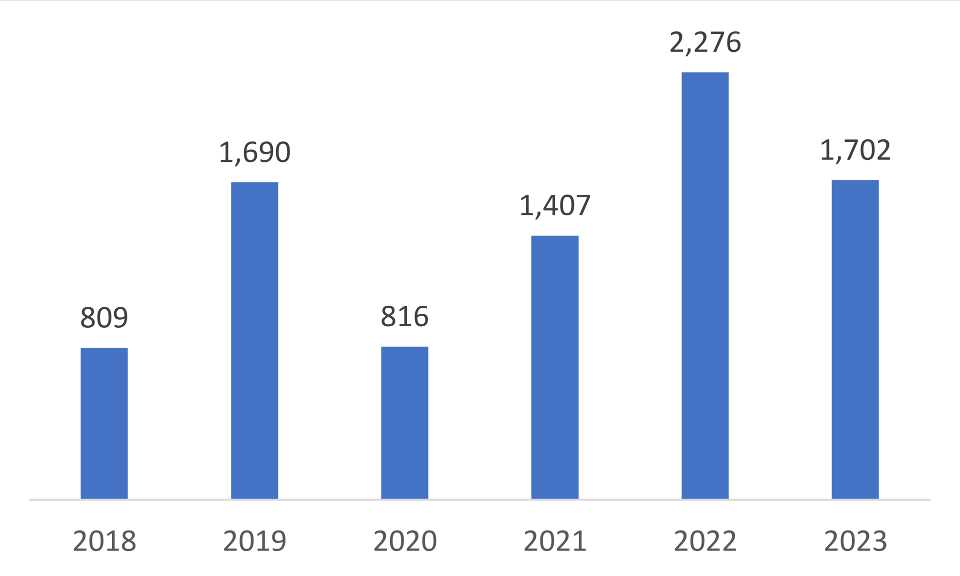
Short-term rentals

Nights,
Short-term rentals, 2023

1.702

-25% (vs. 2022)
+1% (vs. 2019)

Nights,
Short-term rentals, 2018-2023



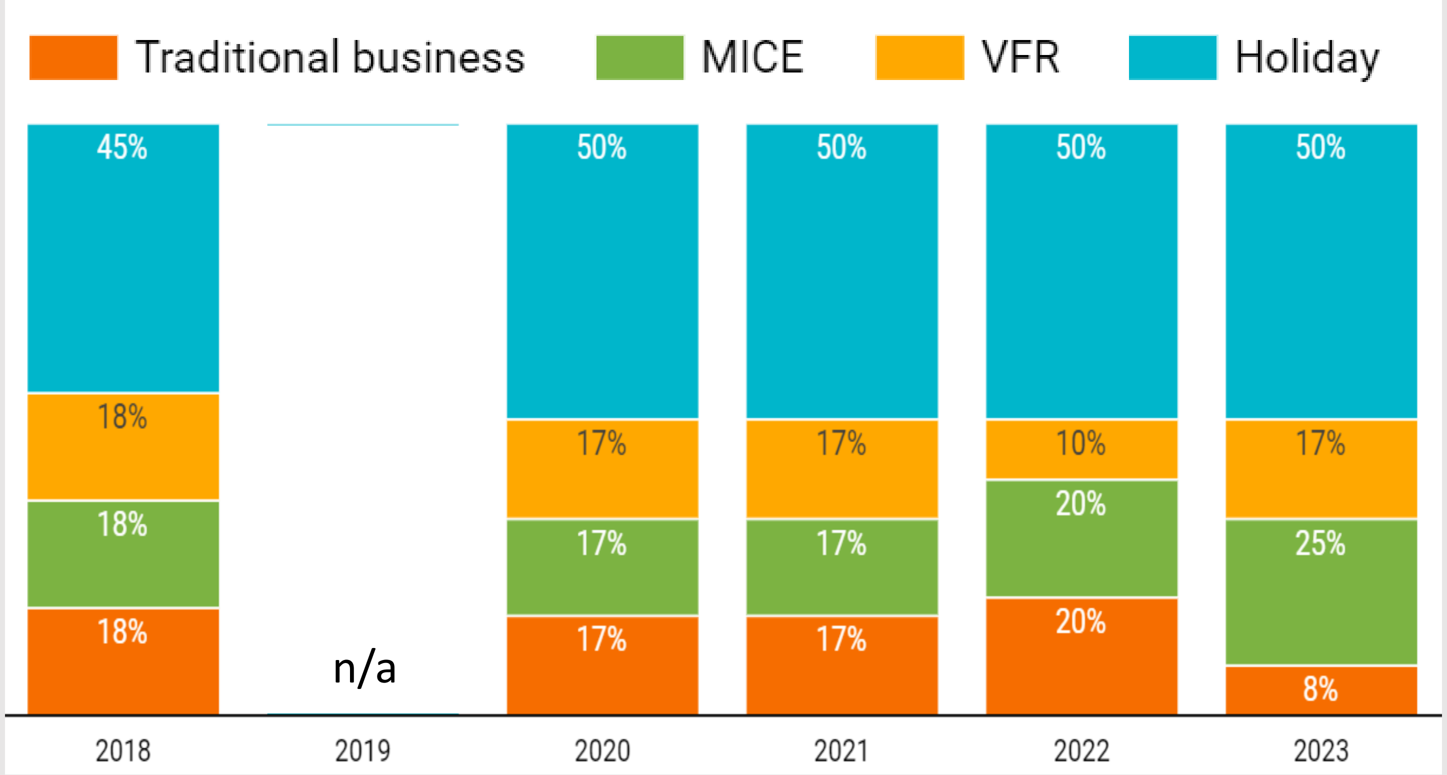
Source: Eurostat (experimental statistics).

Characteristics of Danish & Swedish inbound trips to Luxembourg

Danish trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2018-2023

Danish trips to Luxembourg, 2018-2023



2023

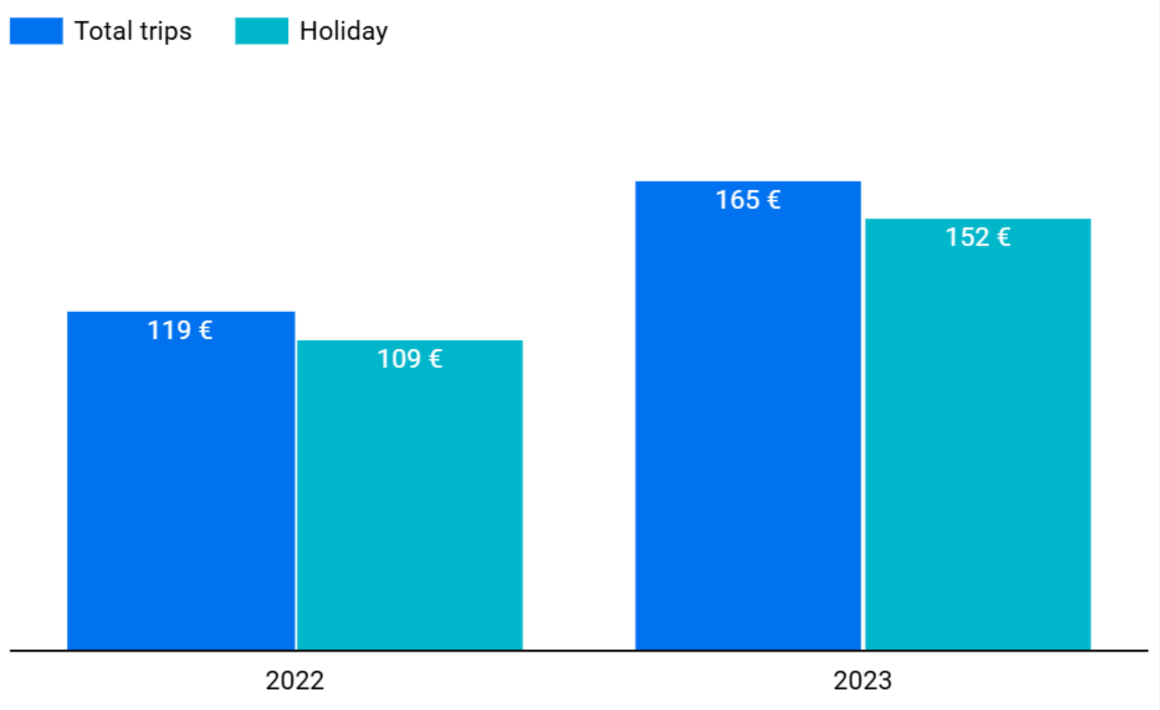
	Denmark to Luxembourg	**Europe to** Luxembourg
Holiday	50%	62%
VFR	17%	15%
MICE	25%	14%
Traditional Business	8%	9%

Source: World Travel Monitor/IPK International.

Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

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



2023

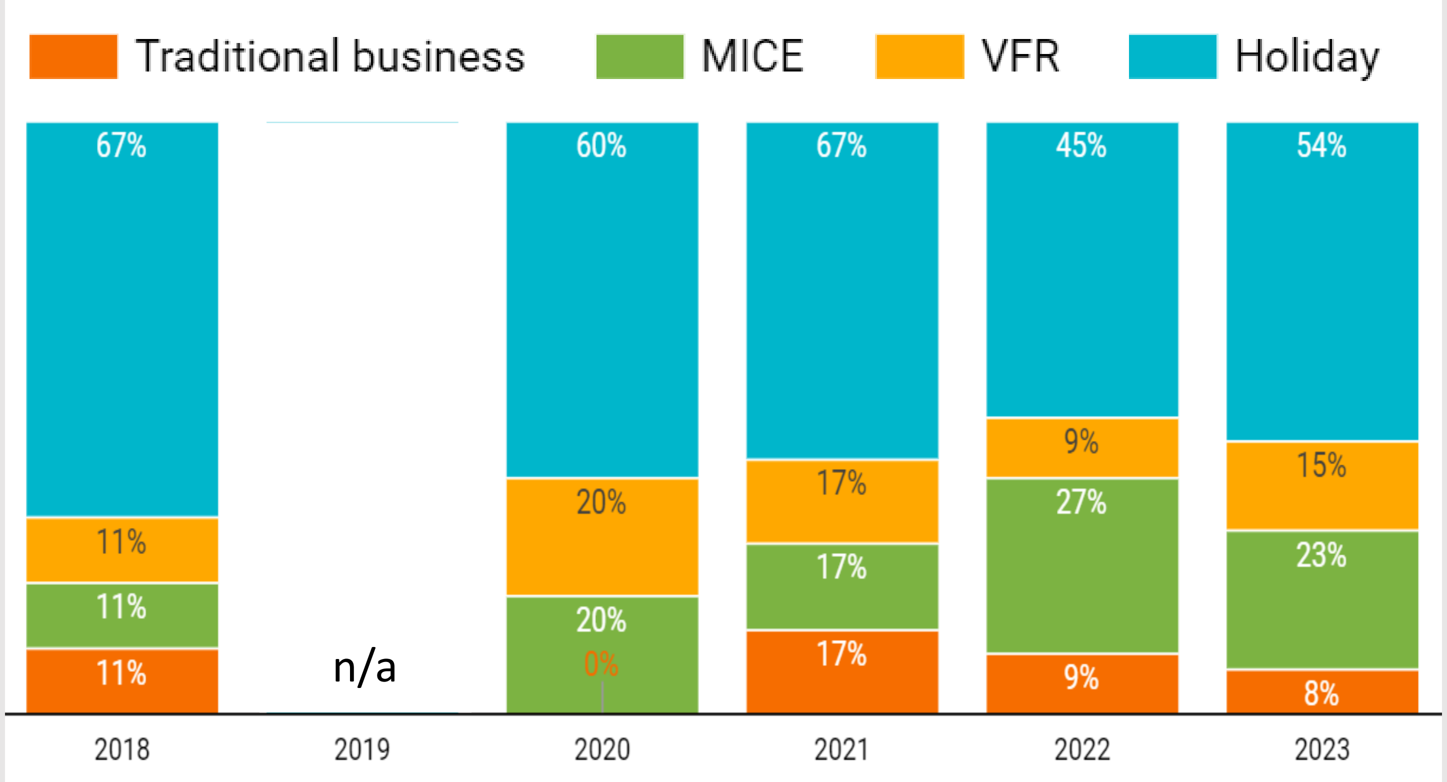
	Denmark to Luxembourg	Europe to Luxembourg
Spend/day/pers. on **all** trips	165 €	152 €
Spend/day/pers. on **holiday** trips	152 €	144 €

Source: World Travel Monitor/IPK International.

Swedish trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2018-2023

Swedish trips to Luxembourg, 2018-2023



2023

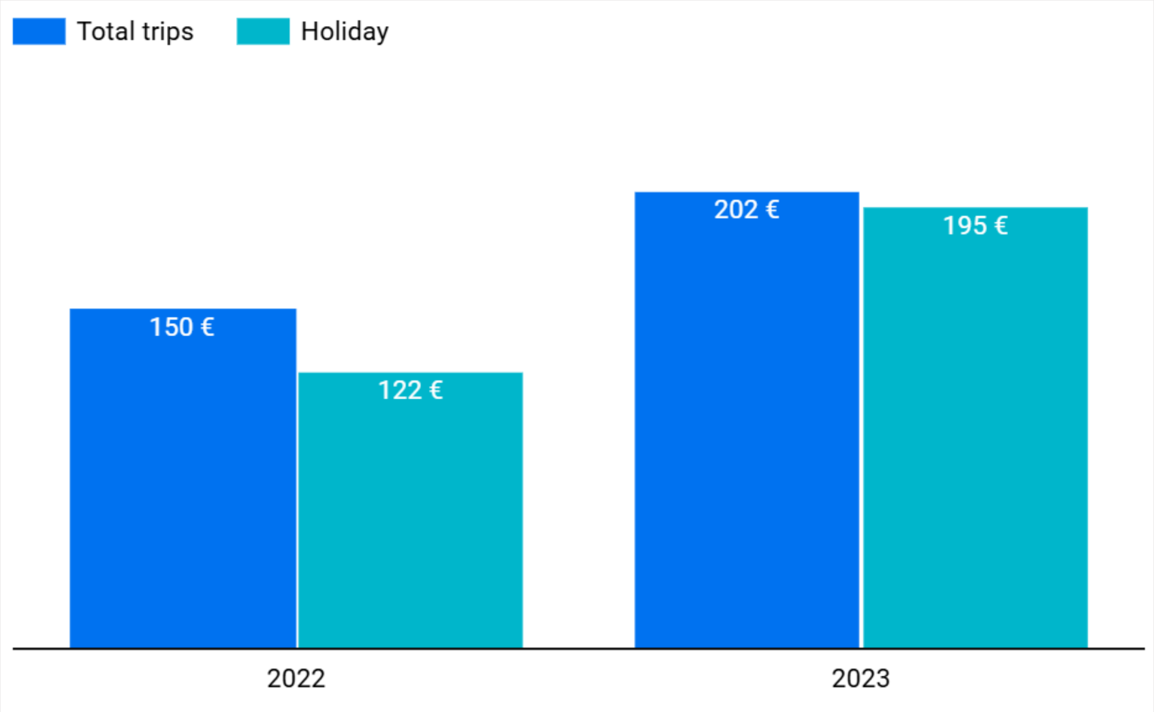
	Sweden to Luxembourg	**Europe to** Luxembourg
Holiday	54%	62%
VFR	15%	15%
MICE	23%	14%
Traditional Business	8%	9%

Source: World Travel Monitor/IPK International.

Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

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



2023

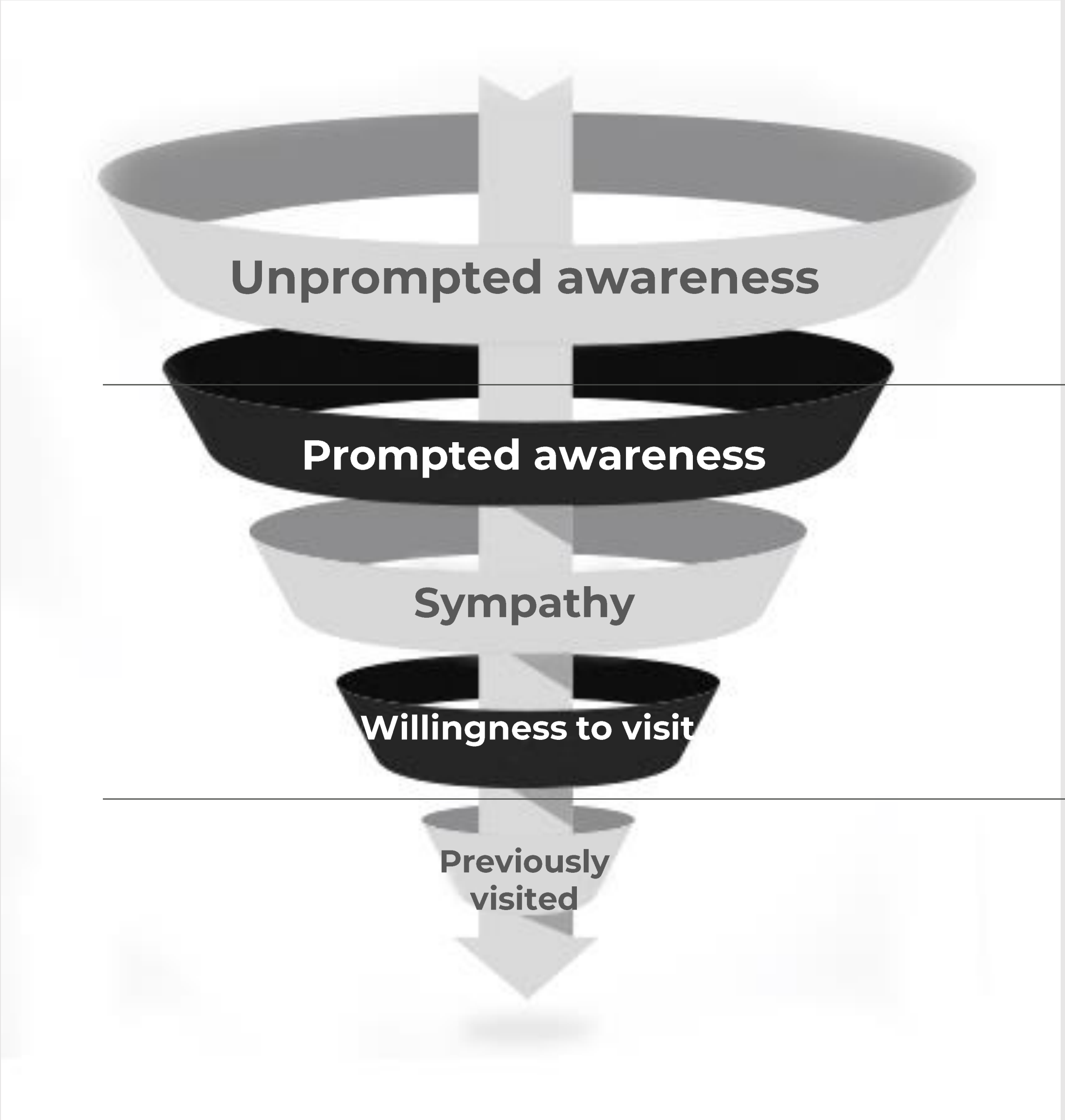
	Sweden to Luxembourg	Europe to Luxembourg
Spend/day/pers. on **all** trips	202 €	152 €
Spend/day/pers. on **holiday** trips	195 €	144 €

Source: World Travel Monitor/IPK International.

Brand strength & Growth potential

Brand Funnel 2024

Assessing Luxembourg’s brand strength as a destination



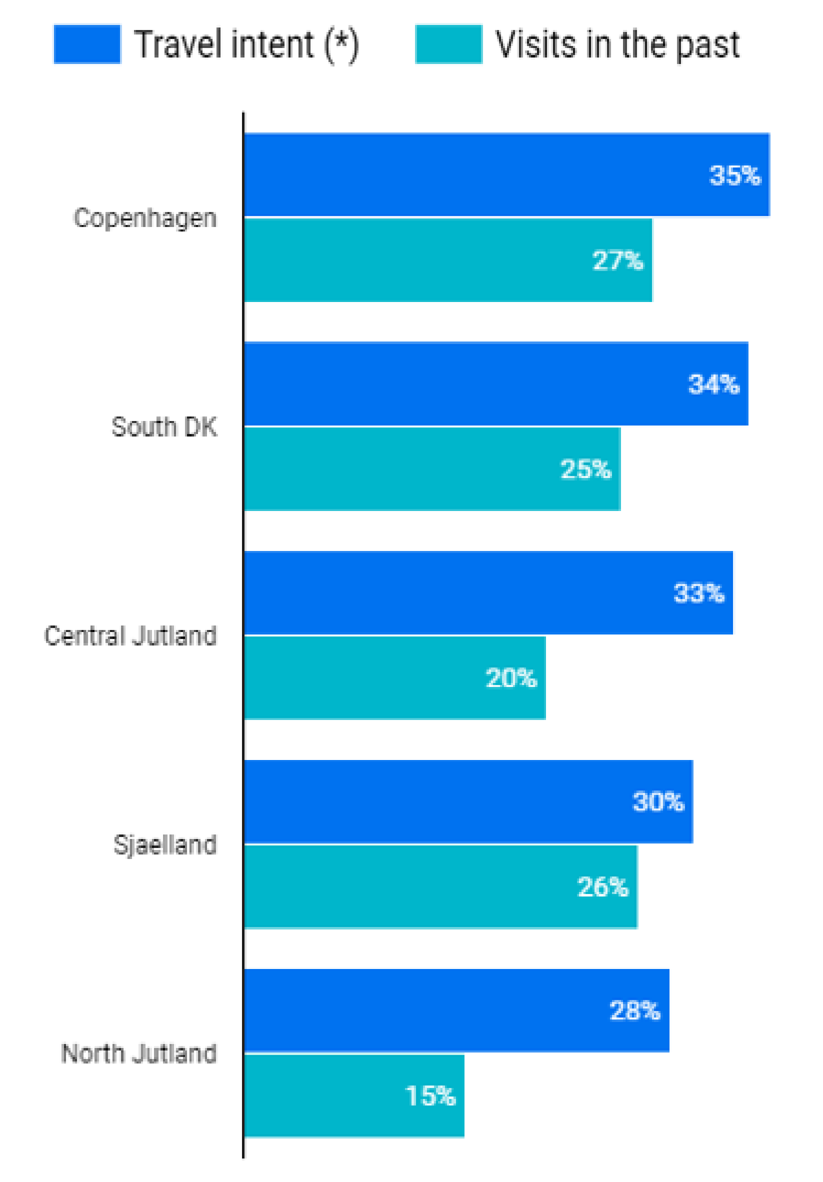
	
86%	82%
56%	55%
13%	15%
24%	20%

Core future visitor potential from Denmark (*)
0.6 million

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

Regional origin 2024

Past visitors and future potential



Source: LFT Brand & Potential Study.

General theme interest (*)

Theme	Europe Rank	Denmark Rank	Denmark % interested
Resting/Relaxation	1	1	73%
Culinary	2	2	70%
Nature	3	3	69%
Family	12	4	65%
City	5	5	65%
Culture	11	6	56%
Events	16	7	55%
Luxury	24	8	55%
History/Unesco	10	9	55%
Shopping	23	10	54%
Castles	9	11	51%
Sustainability	15	12	51%
Wellness	25	13	51%
Hiking	17	14	51%
Nightlife (**)	20	15	50%
Countryside	22	16	49%
Wine	21	17	47%
Camping	29	18	46%
Travelling by train	18	19	45%
Active-sports	27	20	44%
Industrial heritage	28	21	38%
Cycling	31	22	33%
MTB	32	23	30%
Motorcycling	33	24	28%

(*) 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).

Source: LFT Brand & Potential Study.

Luxembourg's Theme Competence (*)

Theme	EU	DK	DK
	Rank	**Rank**	% agreeing
City	1	**1**	37%
Resting/Relaxation	2	**2**	33%
Culinary	3	**3**	33%
Shopping	8	**4**	30%
Family	7	**5**	29%
Culture	5	**6**	28%
Nature	4	**7**	28%
Nightlife (***)	11	**8**	26%
History/Unesco	10	**9**	25%
Castles	6	**10**	24%
Wine	12	**11**	21%
Wellness	13	**12**	21%
Industrial heritage	19	**13**	20%
Sustainability	15	**14**	20%
Countryside	14	**15**	19%
Hiking	9	**16**	19%
Active-sports	18	**17**	18%
Camping	16	**18**	17%
Cycling	17	**19**	17%
MTB	20	**20**	16%

Growth potential for themes (**)

- Resting/relaxation
- Culinary
- Nature
- Culture
- Castles
- Countryside
- Hiking
- Camping
- Cycling

(*) 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.

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

Source: LFT Brand & Potential Study.

Luxembourg's Brand Value Ratings (*)

Feature			
	Rank	**Rank**	% agreeing
Of high quality	2	**1**	40%
Open-minded, tolerant	5	**2**	40%
Safe	1	**3**	40%
Authentic	4	**4**	39%
Welcoming, hospitable	3	**5**	38%
Exclusive, luxurious	7	**6**	37%
Attractive, appealing	6	**7**	36%
Dynamic, modern	8	**8**	32%
Service-oriented	9	**9**	32%
Surprising	10	**10**	32%
Lively, hip	12	**11**	30%
Lot of variety, diversified	11	**12**	27%
Not crowded, insider tip	13	**13**	24%
Sustainable	14	**14**	20%

(*) 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.

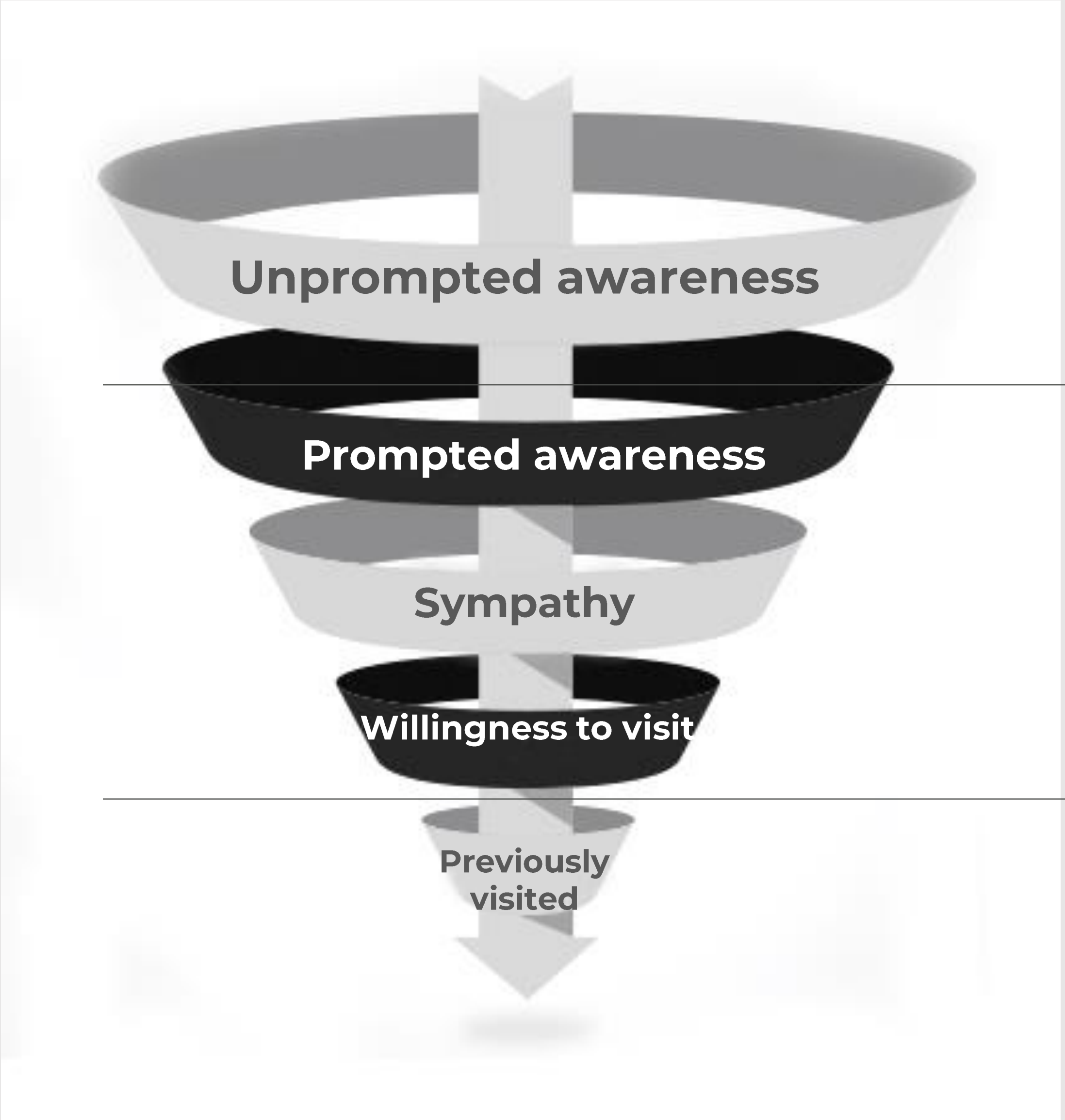
Source: LFT Brand & Potential Study.

Spontaneous associations with Luxembourg

Source: LFT Brand & Potential Study.

Brand Funnel 2024

Assessing Luxembourg's brand strength as a destination



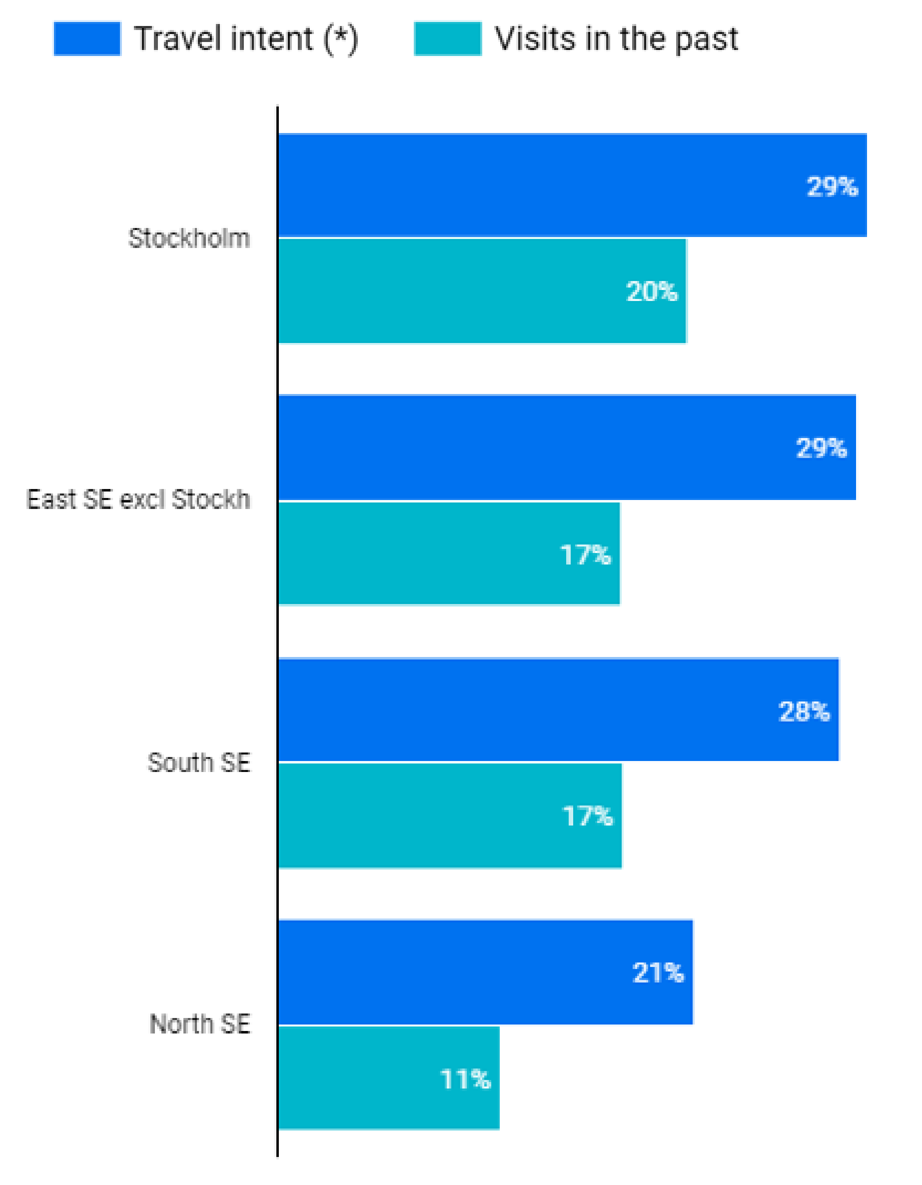
		
Unprompted awareness		
Prompted awareness	82%	82%
Sympathy	50%	55%
Willingness to visit	11%	15%
Previously visited	17%	20%

Core future visitor potential from Sweden (*)
0.8 million

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

Regional origin 2024

Past visitors and future potential



Source: LFT Brand & Potential Study.

General theme interest (*)

Theme	Rank	**Rank**	% interested
Resting/Relaxation	1	**1**	73%
Culinary	2	**2**	71%
Nature	3	**3**	67%
City	5	**4**	64%
Sustainability	15	**5**	63%
Family	12	**6**	62%
History/Unesco	10	**7**	58%
Culture	11	**8**	56%
Events	16	**9**	55%
Travelling by train	18	**10**	54%
Castles	9	**11**	53%
Luxury	24	**12**	53%
Countryside	22	**13**	52%
Shopping	23	**14**	51%
Wine	21	**15**	51%
Nightlife (**)	20	**16**	51%
Hiking	17	**17**	47%
Wellness	25	**18**	44%
Active-sports	27	**19**	43%
Camping	29	**20**	42%
Industrial heritage	28	**21**	40%
Cycling	31	**22**	35%
Motorcycling	33	**23**	29%
MTB	32	**24**	27%

(*) 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).

Source: LFT Brand & Potential Study.

Luxembourg's Theme Competence (*)

Theme	EU	Sweden	Sweden
	Rank	**Rank**	% agreeing
Culinary	3	**1**	36%
City	1	**2**	31%
Shopping	8	**3**	28%
Resting/Relaxation	2	**4**	28%
Culture	5	**5**	26%
Family	7	**6**	25%
Nightlife (***)	11	**7**	23%
Castles	6	**8**	22%
History/Unesco	10	**9**	21%
Wine	12	**10**	21%
Nature	4	**11**	20%
Countryside	14	**12**	19%
Sustainability	15	**13**	18%
Wellness	13	**14**	16%
Hiking	9	**15**	15%
Active-sports	18	**16**	15%
Camping	16	**17**	15%
Industrial heritage	19	**18**	13%
Cycling	17	**19**	12%
MTB	20	**20**	11%

Growth potential for themes (**)

- Resting/relaxation
- Nature
- Hiking
- Camping
- Cycling

(*) 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.

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

Source: LFT Brand & Potential Study.

Luxembourg's Brand Value Ratings (*)

Feature			
	Rank	**Rank**	% agreeing
Safe	1	**1**	35%
Welcoming, hospitable	3	**2**	34%
Of high quality	2	**3**	34%
Exclusive, luxurious	7	**4**	32%
Attractive, appealing	6	**5**	29%
Authentic	4	**6**	27%
Service-oriented	9	**7**	26%
Dynamic, modern	8	**8**	24%
Surprising	10	**9**	24%
Open-minded, tolerant	5	**10**	24%
Lively, hip	12	**11**	24%
Lot of variety, diversified	11	**12**	23%
Not crowded, insider tip	13	**13**	21%
Sustainable	14	**14**	20%

(*) 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.

Source: LFT Brand & Potential Study.

Spontaneous associations with Luxembourg

Source: LFT Brand & Potential Study.

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