



Luxembourg for Tourism

Market profile

NETHERLANDS

2022







# **Economic indicators & General Travel Demand**

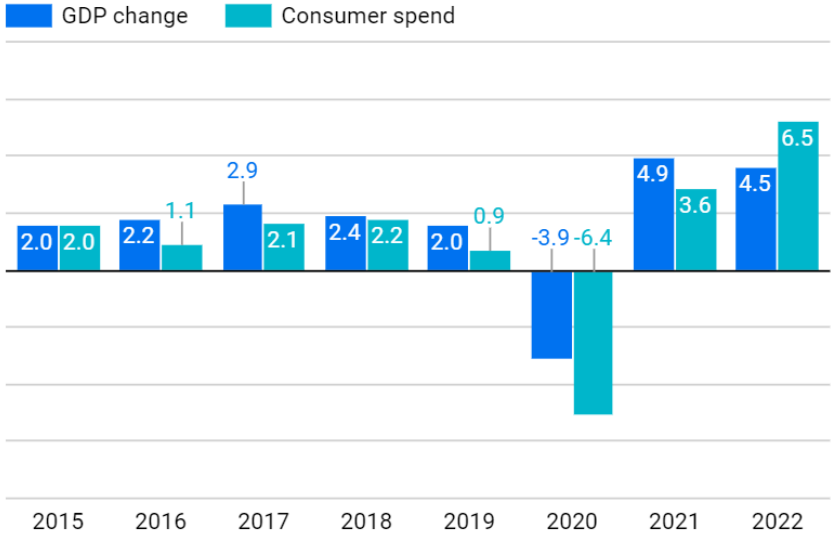
# Economic indicators – General travel demand



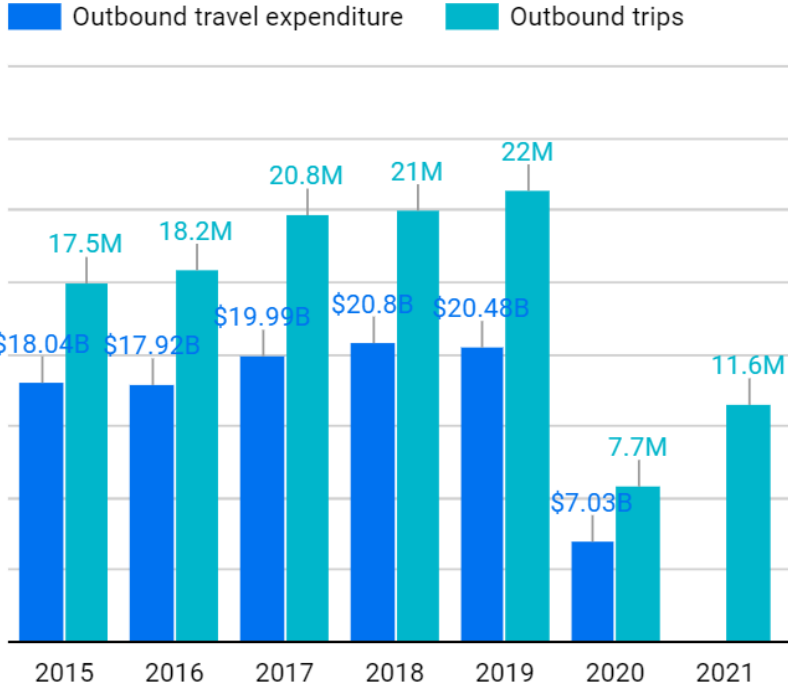
## Economy & population

GDP (PPP) per capita **\$58,159**    Unemployment (%) **3.9**    Population (mn) **17.5**    Inflation (%) **10.0**

### GDP and Consumer spending, % annual change



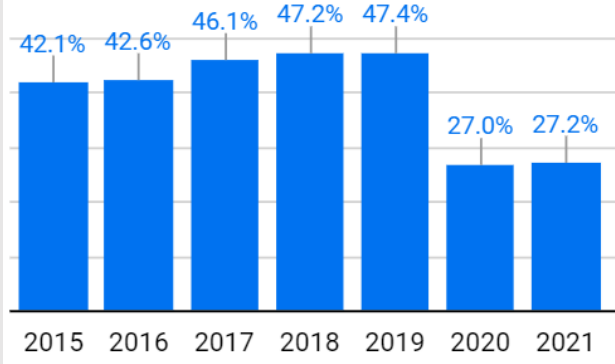
## Outbound trips and travel expenditure



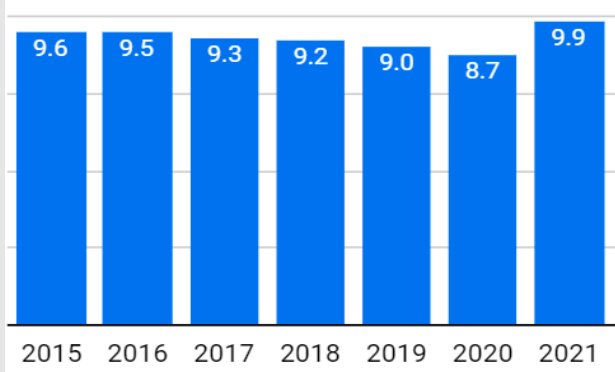
Average spend per outbound trip (2019)  
**929 \$**

Outbound travel intensity  
**1.28 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)  
**88.9%**



# **Arrivals & nights in paid accommodation in Luxembourg**

# Nights, arrivals & length of stay in paid accommodation 2022



**Nights,  
paid accommodation, 2022**



**+65%** (vs. 2021)  
**+7%** (vs. 2019)

**Arrivals,  
paid accommodation, 2022**



**+67%** (vs. 2021)  
**+19%** (vs. 2019)

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



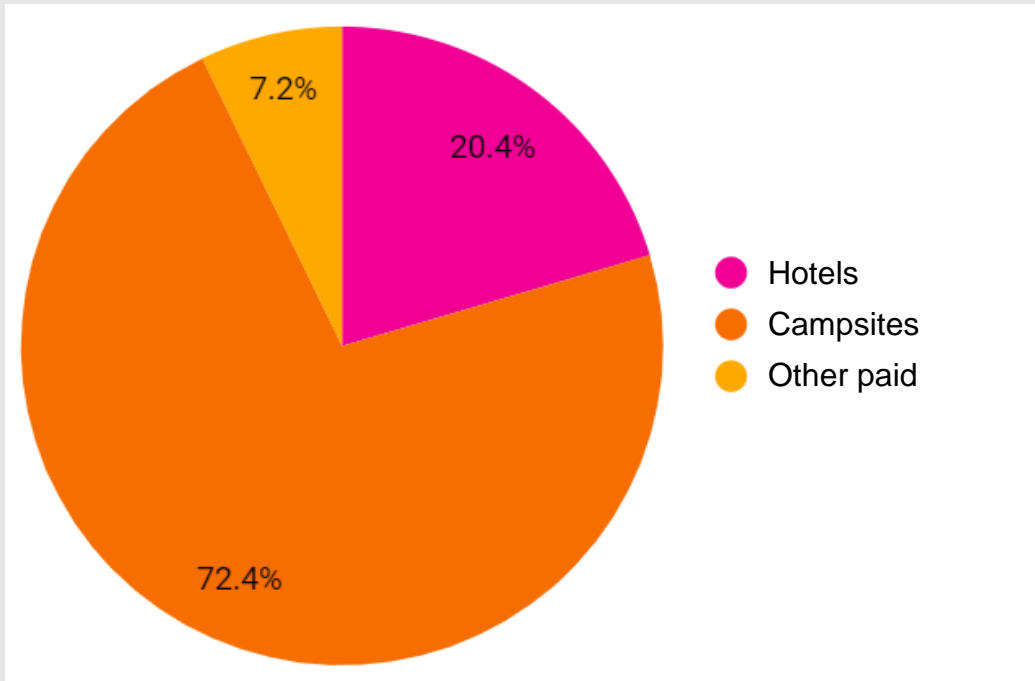
**-0.05 days** (vs. 2021)  
**-0.39 days** (vs. 2019)

# Nights & arrivals in paid accommodation

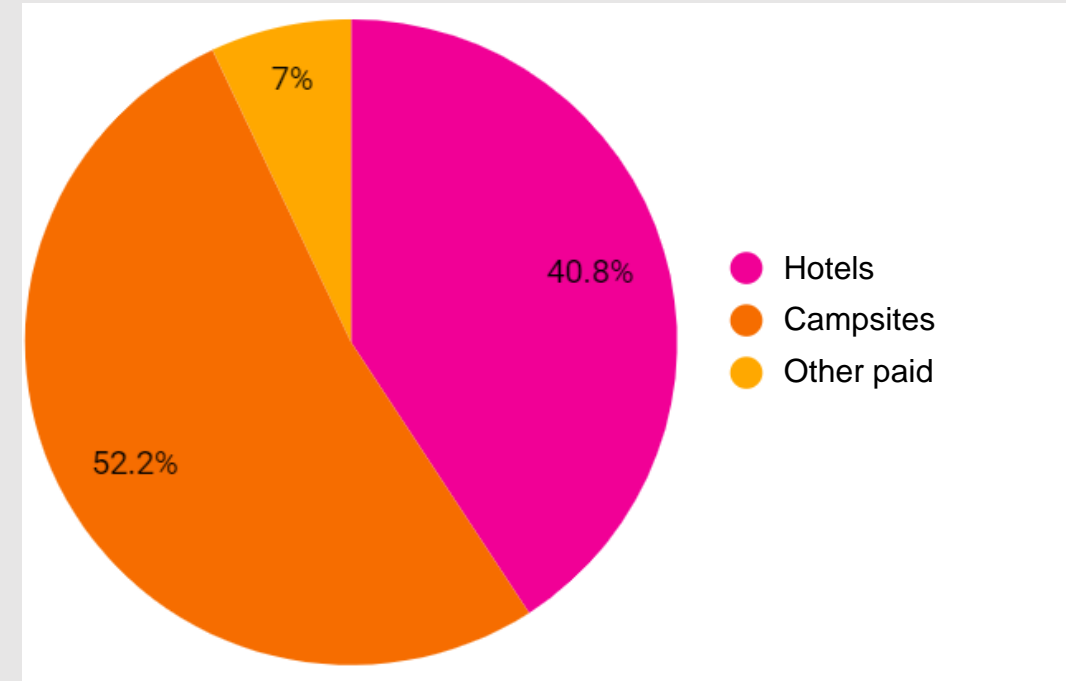
## Type of accommodation, 2022



**Nights,  
paid accommodation**



**Arrivals,  
paid accommodation**



<b>Hotels</b>	<b>158.967</b>	<b>+33%</b> (vs. 2019)
<b>Campsites</b>	<b>563.861</b>	<b>+0%</b> (vs. 2019)
<b>Other paid</b>	<b>55.889</b>	<b>+21%</b> (vs. 2019)

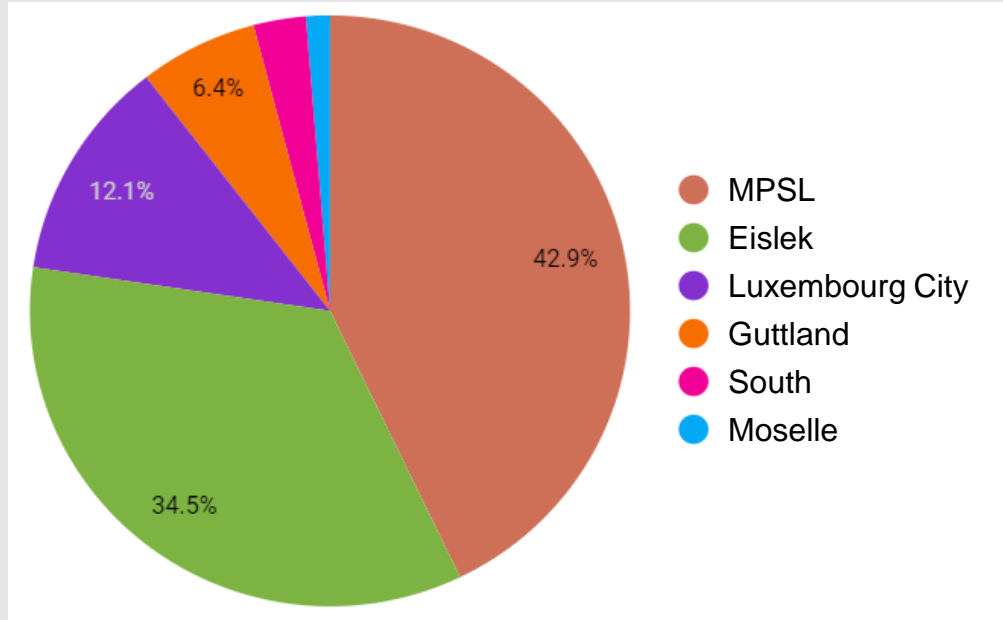
<b>Hotels</b>	<b>90.967</b>	<b>+30%</b> (vs. 2019)
<b>Campsites</b>	<b>116.354</b>	<b>+9%</b> (vs. 2019)
<b>Other paid</b>	<b>15.570</b>	<b>+42%</b> (vs. 2019)

# Nights & arrivals in paid accommodation

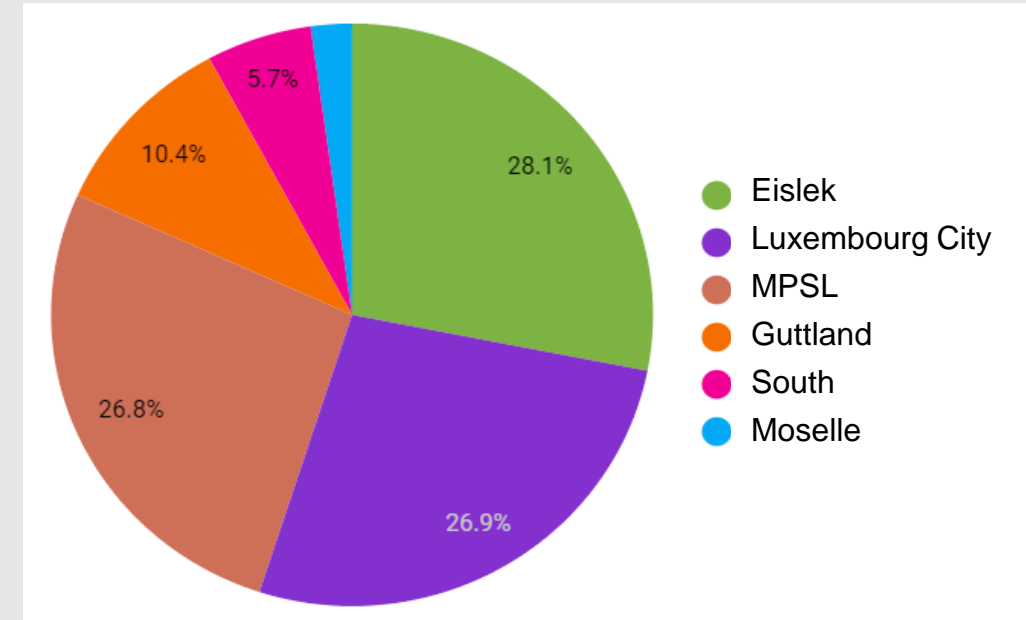
## Regions, 2022



**Nights,  
paid accommodation**



**Arrivals,  
paid accommodation**



<b>MPSL</b>	<b>333.756</b>	<b>+36%</b> (vs. 2019)
<b>Eislek</b>	<b>268.678</b>	<b>-26%</b> (vs. 2019)
<b>Luxembourg City</b>	<b>94.581</b>	<b>+45%</b> (vs. 2019)
<b>Guttland</b>	<b>49.676</b>	<b>+68%</b> (vs. 2019)
<b>South</b>	<b>22.008</b>	<b>+61%</b> (vs. 2019)
<b>Moselle</b>	<b>10.018</b>	<b>+13%</b> (vs. 2019)

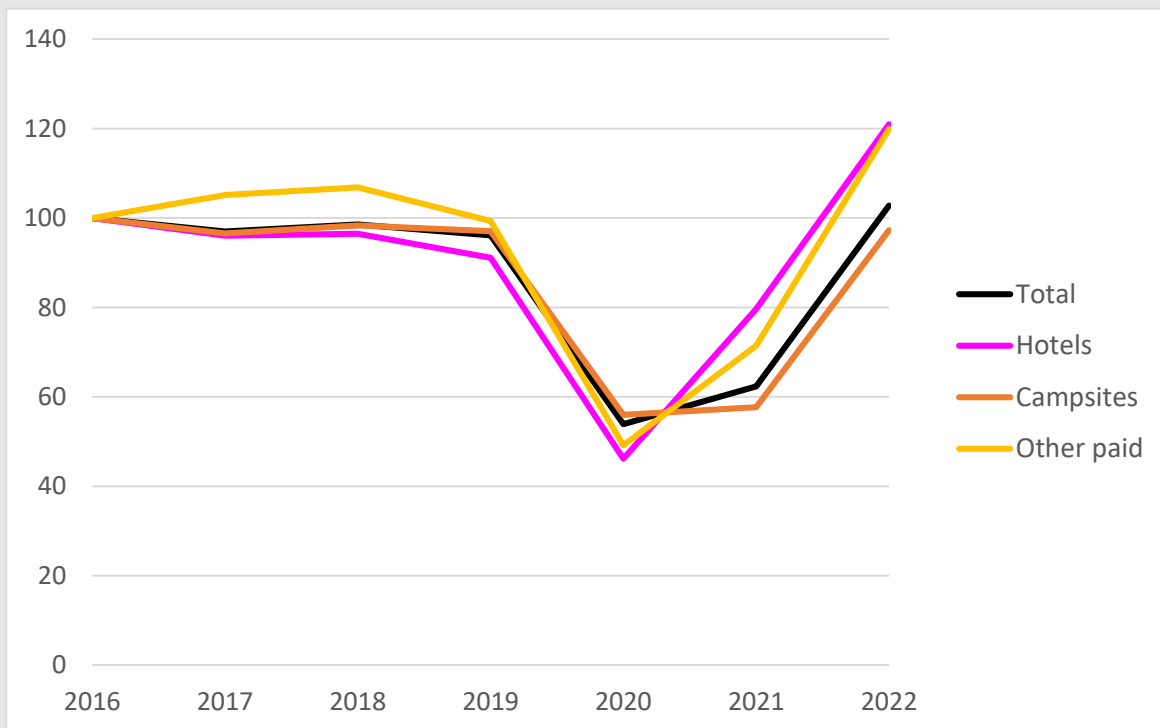
<b>Eislek</b>	<b>62.585</b>	<b>-18%</b> (vs. 2019)
<b>Luxembourg City</b>	<b>59.966</b>	<b>+41%</b> (vs. 2019)
<b>MPSL</b>	<b>59.667</b>	<b>+59%</b> (vs. 2019)
<b>Guttland</b>	<b>23.138</b>	<b>+29%</b> (vs. 2019)
<b>South</b>	<b>12.617</b>	<b>+38%</b> (vs. 2019)
<b>Moselle</b>	<b>4.918</b>	<b>+18%</b> (vs. 2019)

# Nights in paid accommodation

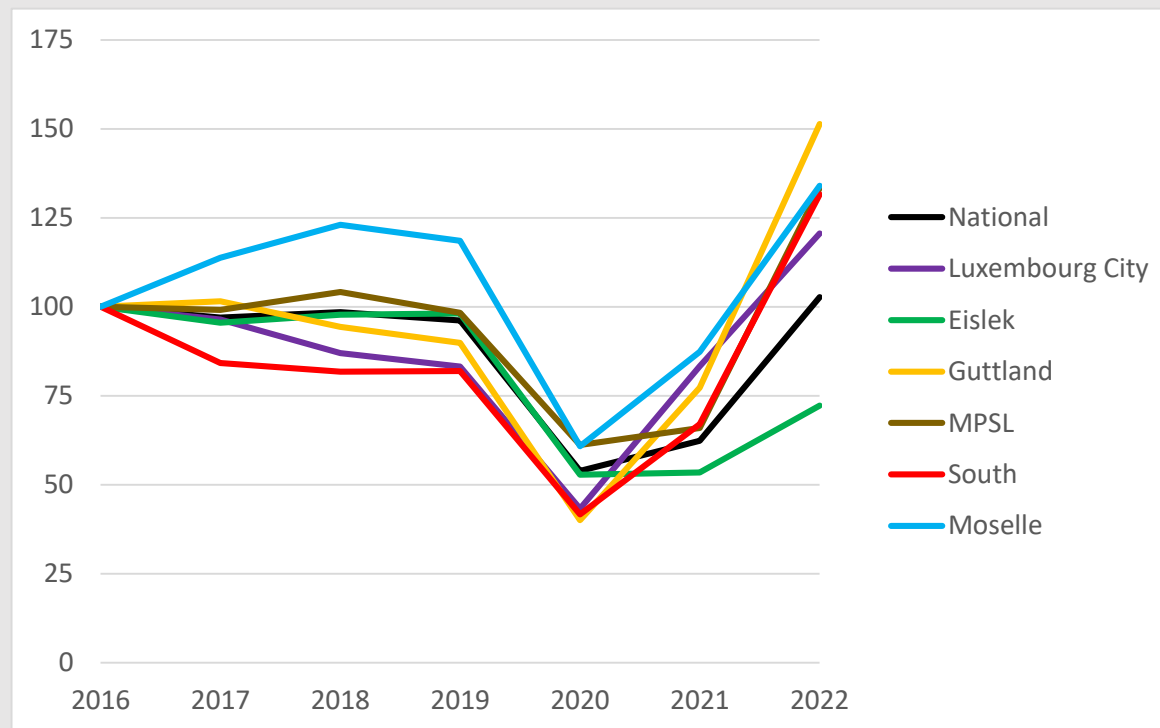
## Total, Type of accommodation & Regions : Trends 2016-2022



### 2016 = Index 100



### 2016 = Index 100



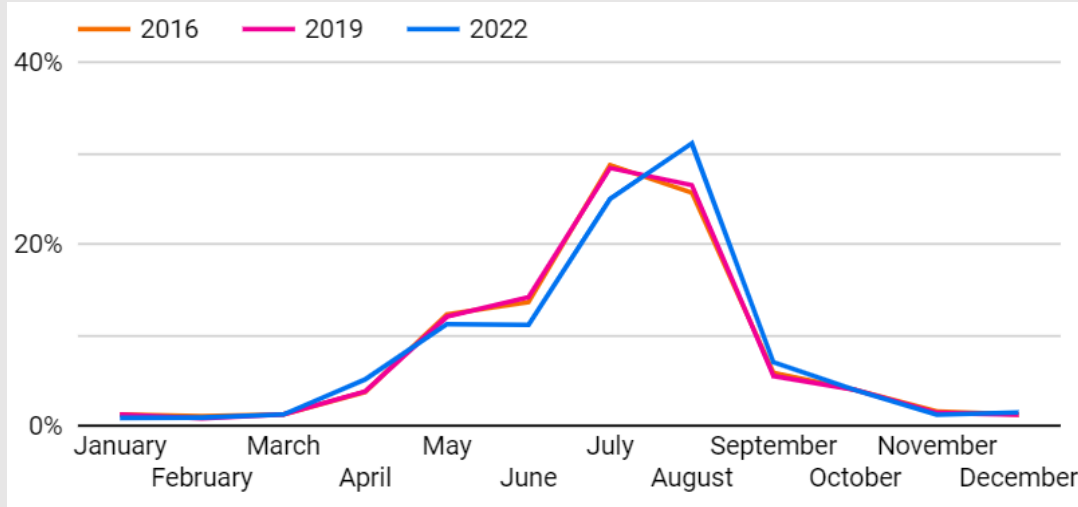


# Nights in paid accommodation

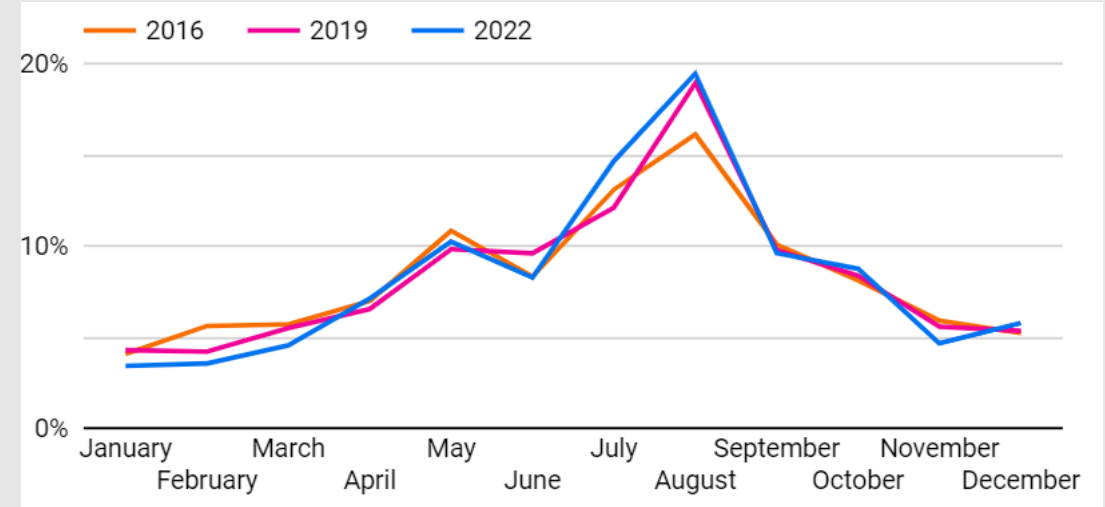
## Seasonality



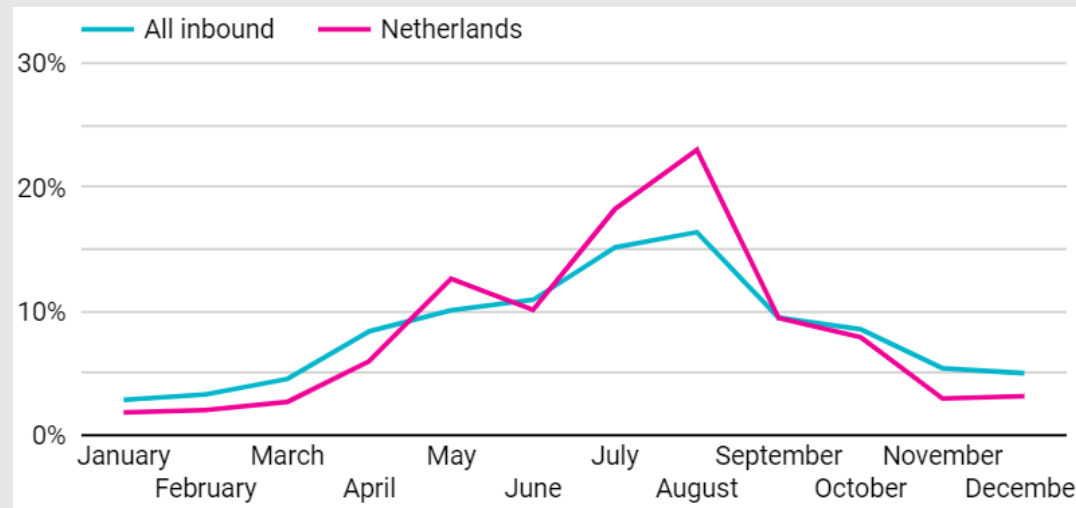
### Dutch nights, all paid accommodation



### Dutch nights, hotels



### Nights, all paid accommodation, 2022

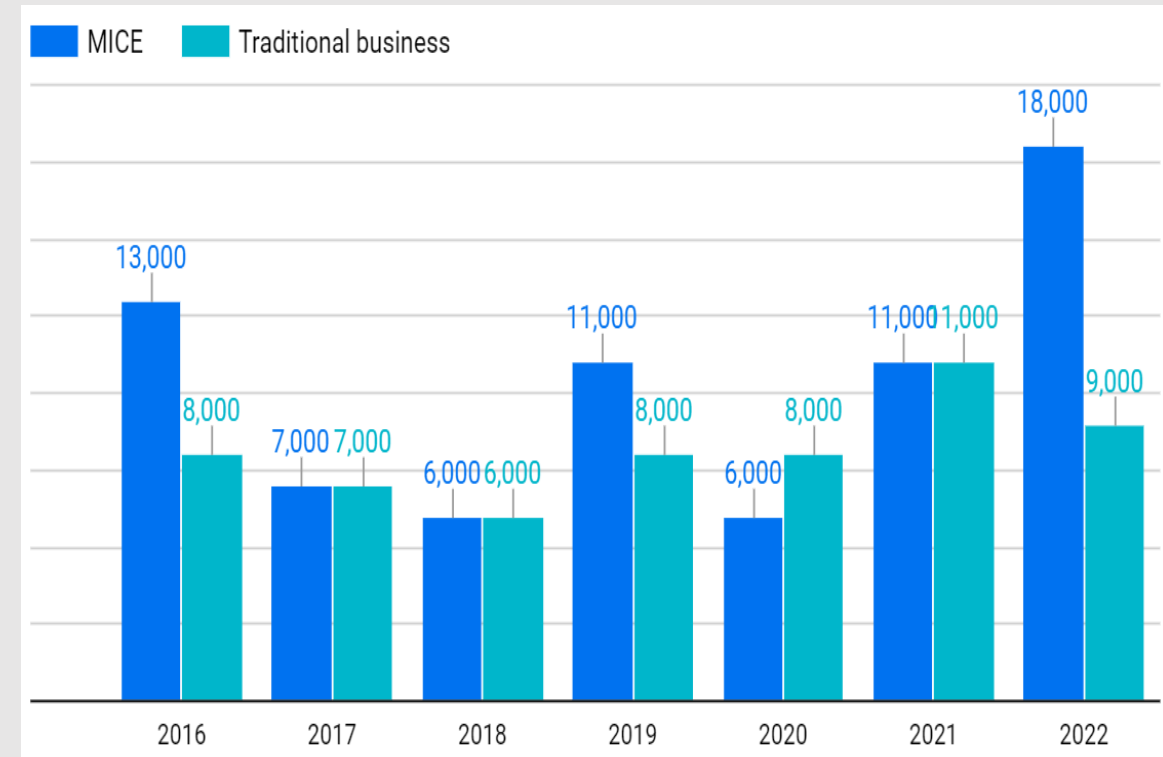
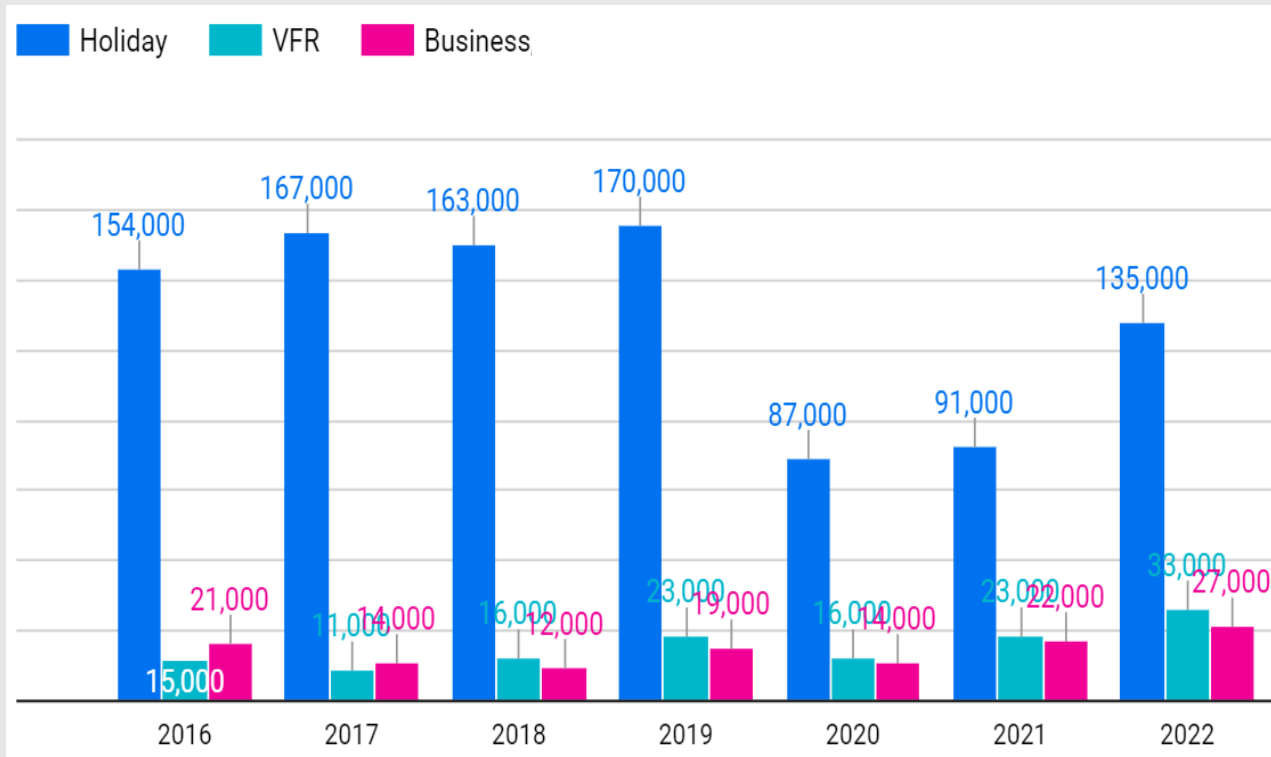




# **Characteristics of Dutch inbound trips to Luxembourg**

# Dutch trips to Luxembourg with overnight (all accommodation)

## Purpose of visit, 2016-2022

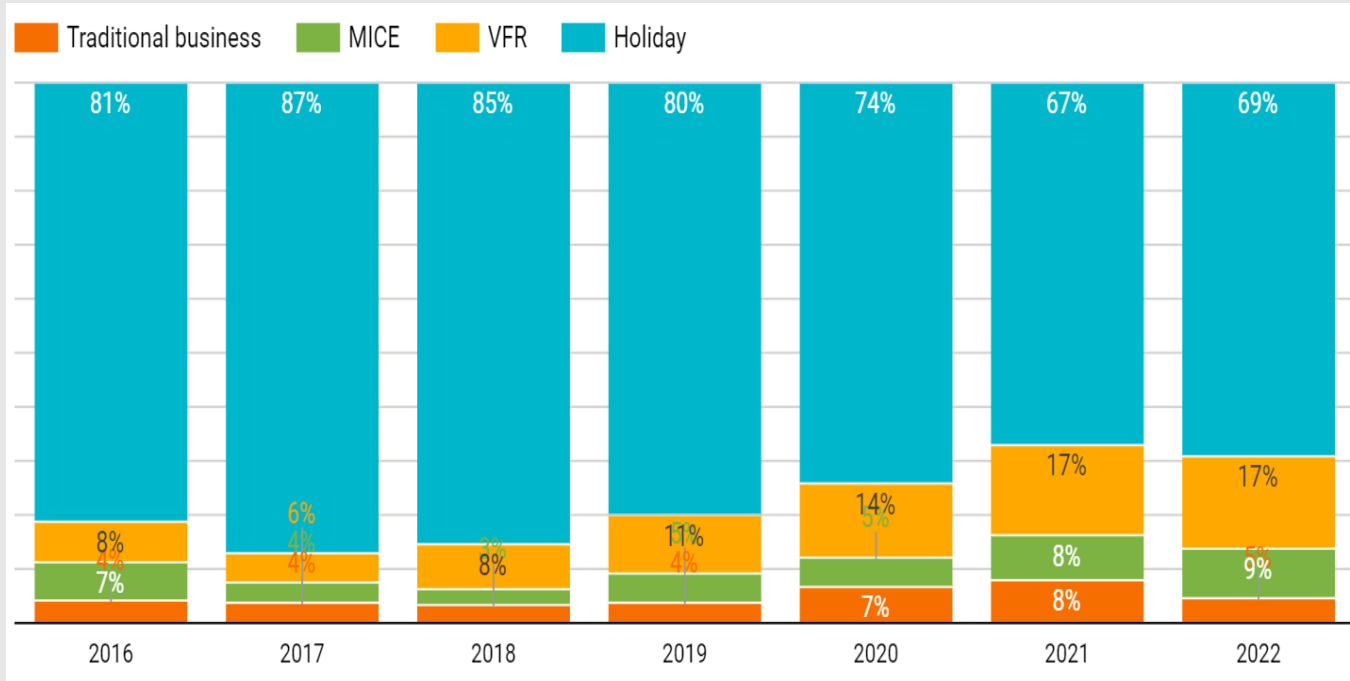


# Dutch trips to Luxembourg with overnight (all accommodation)



## Purpose of visit, 2016-2022

Dutch trips to Luxembourg, 2016-2022

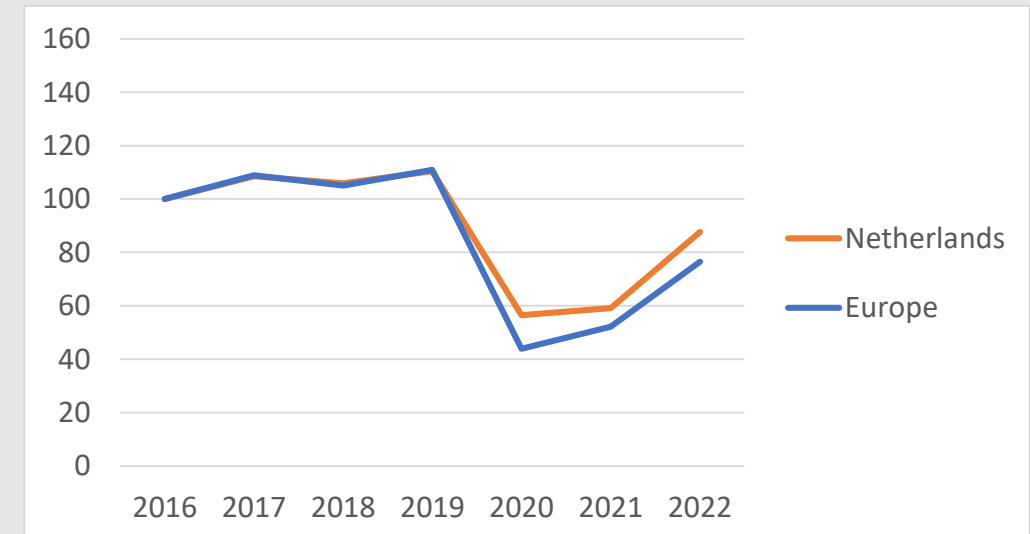


2022

Netherlands to Luxembourg Europe to Luxembourg

Holiday	69%	63%
VFR	17%	17%
MICE	9%	12%
Traditional Business	5%	8%

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



# Dutch same-day trips to Luxembourg

## 2022



### Number of Dutch same-day trips to Luxembourg

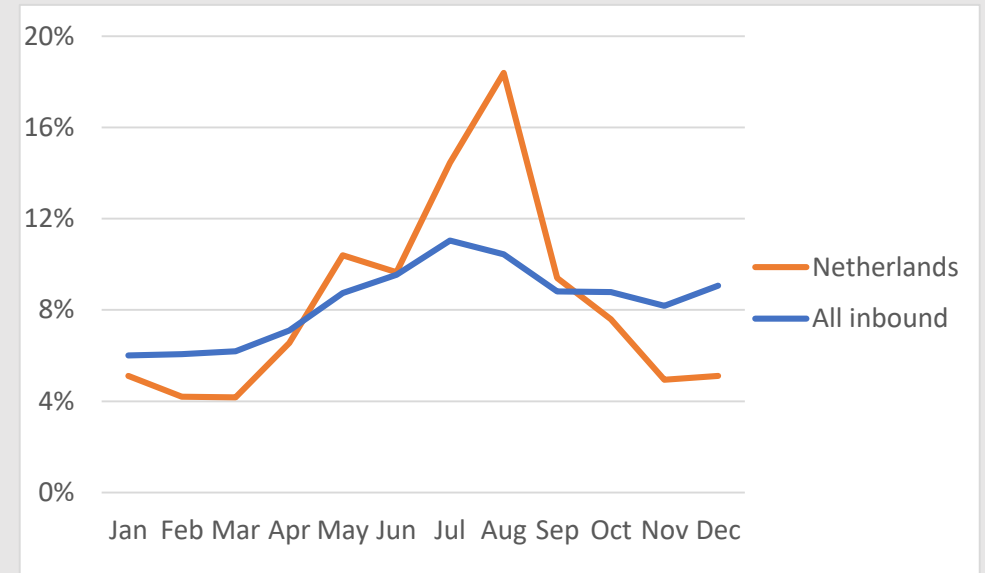
**473.000**  
(17%  
of inbound  
same-day trips  
to  
Luxembourg)

**+69%** (vs. 2021)

### Average length of same-day trips

**7,9 h**  
(All  
inbound  
7,3h)

### Seasonality of same-day trips, % monthly share







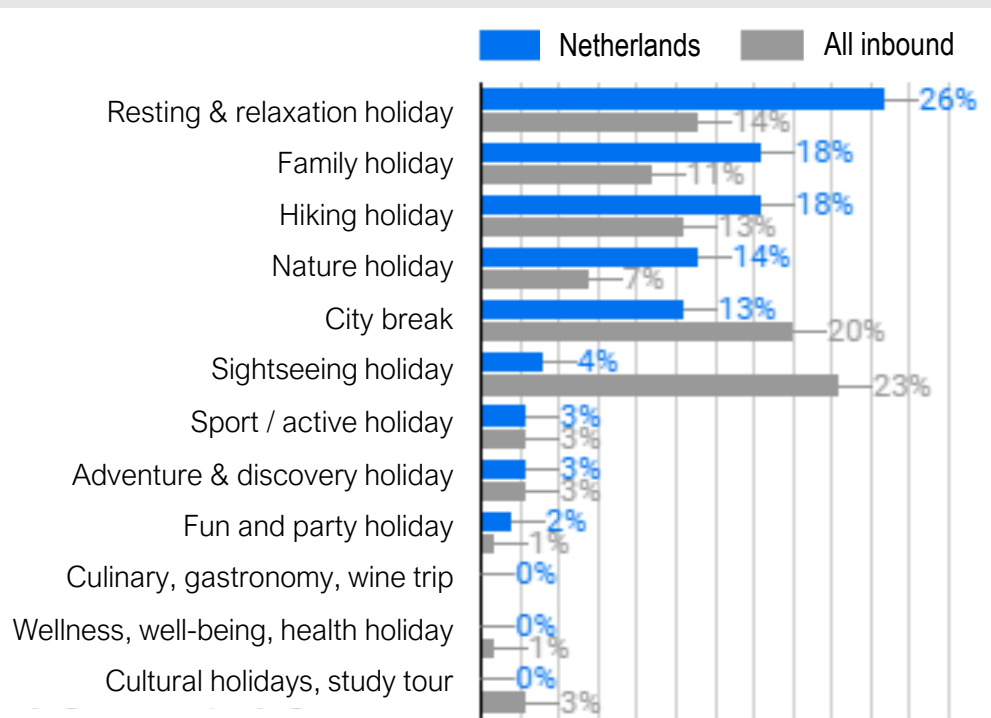
# **Travel behaviour of Dutch leisure visitors in Luxembourg**

# Holiday types

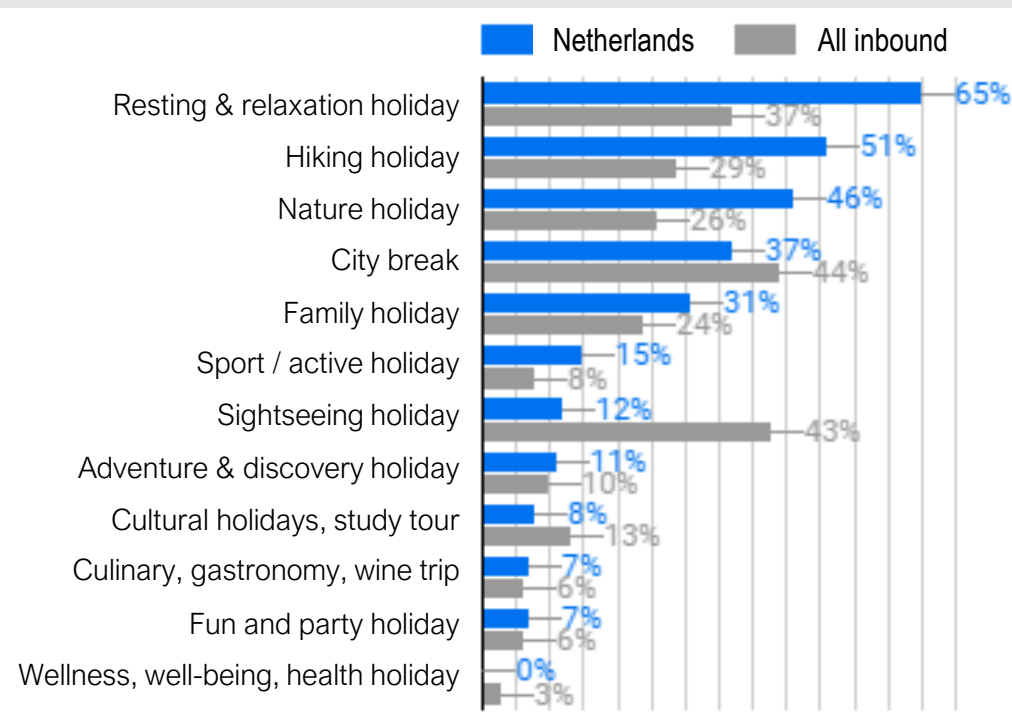
## Inbound leisure visitors with overnight, 2020-2022



### Main holiday types

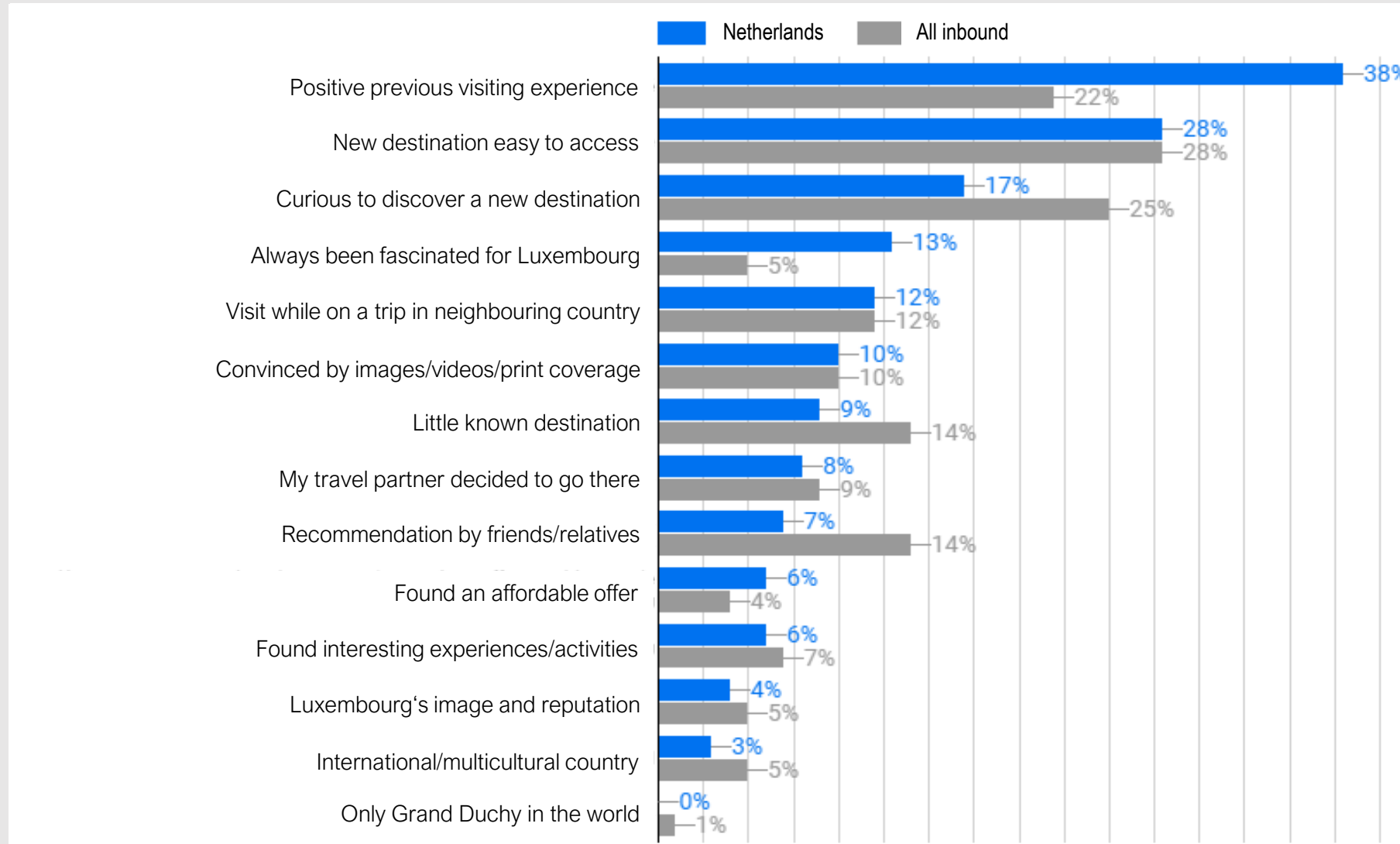


### Additional holiday types



# Key decision criteria for choosing Luxembourg

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

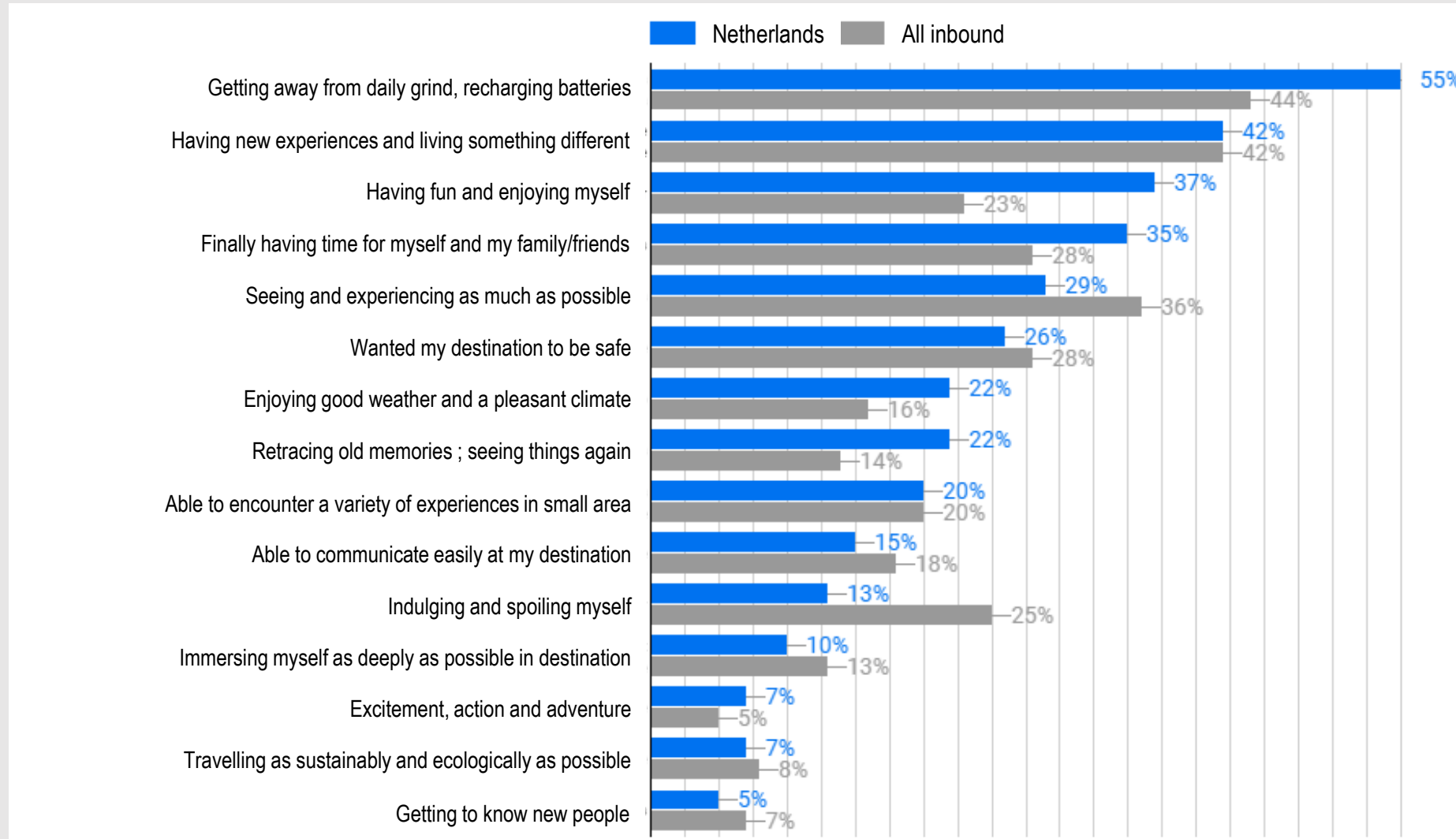


Source: LFT/Ilres Visitor Survey, 2020-2022.

(\*) Maximum 3 answers possible.

# Key travel motivations

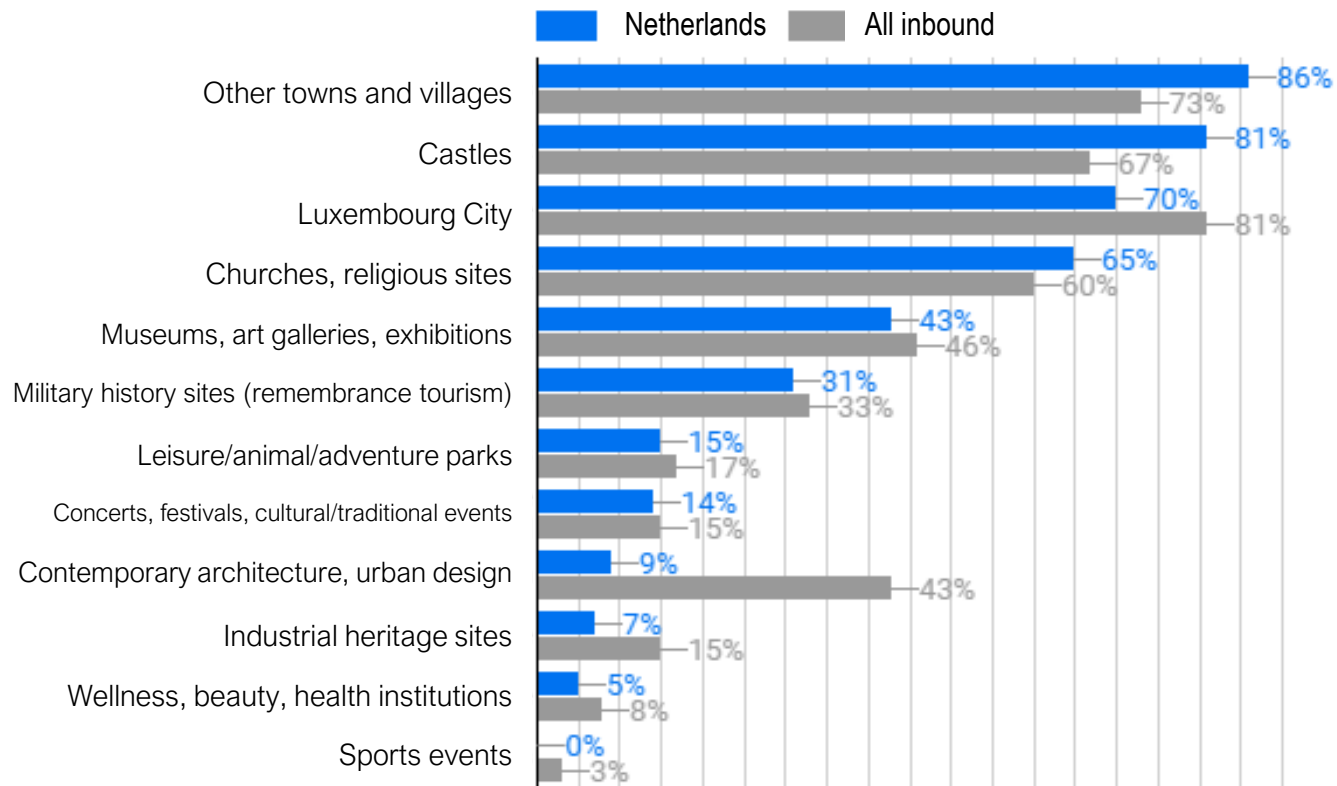
## Inbound leisure visitors with overnight, 2020-2022



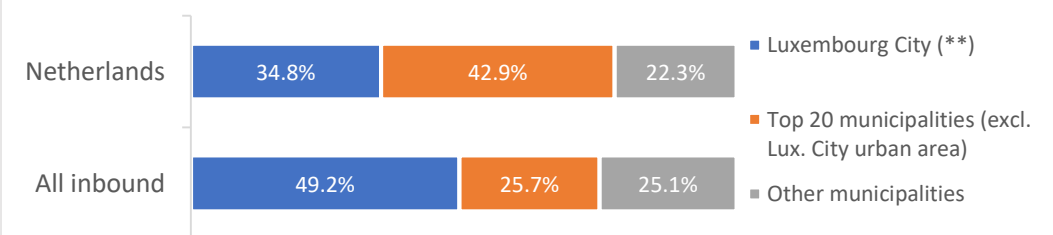
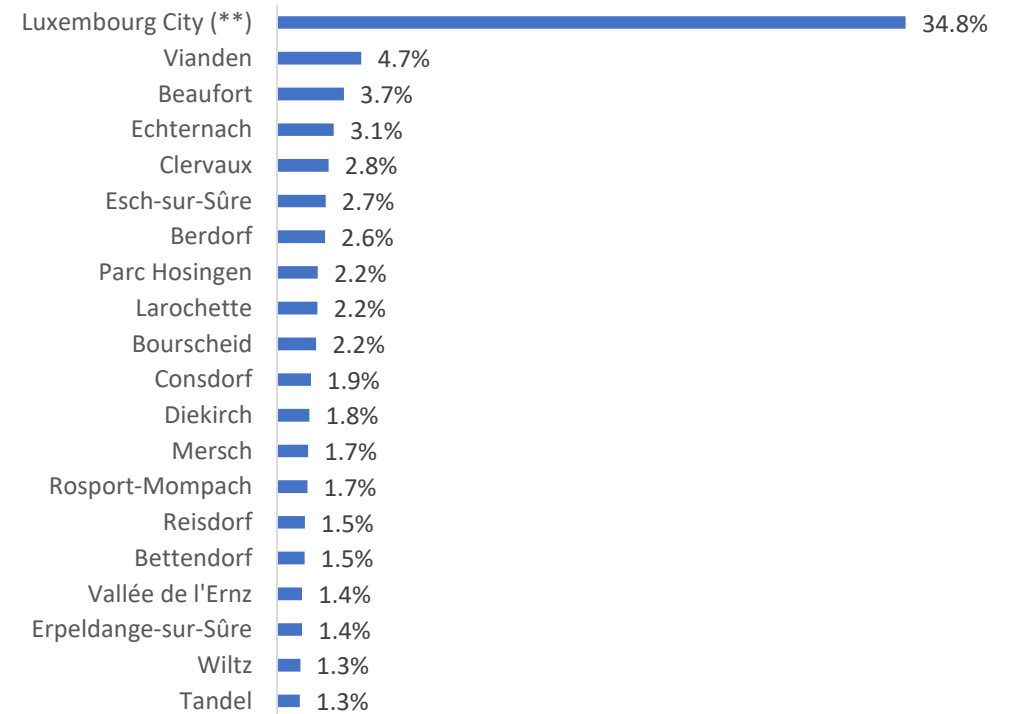
# Type of places and cities visited in Luxembourg



## Places visited during leisure overnight stays<sup>1</sup>



## Top cities visited during Dutch overnight and same-day trips<sup>2</sup> (\*), 2022



Sources: <sup>1</sup>LFT/Ilres Visitor Survey, 2020-2022, <sup>2</sup>Mobile 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).

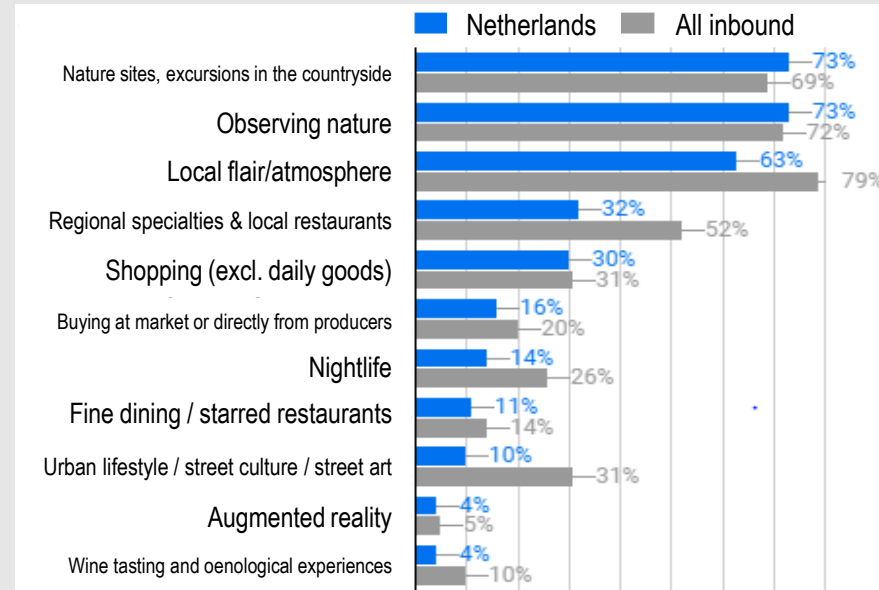


# Activities undertaken in Luxembourg

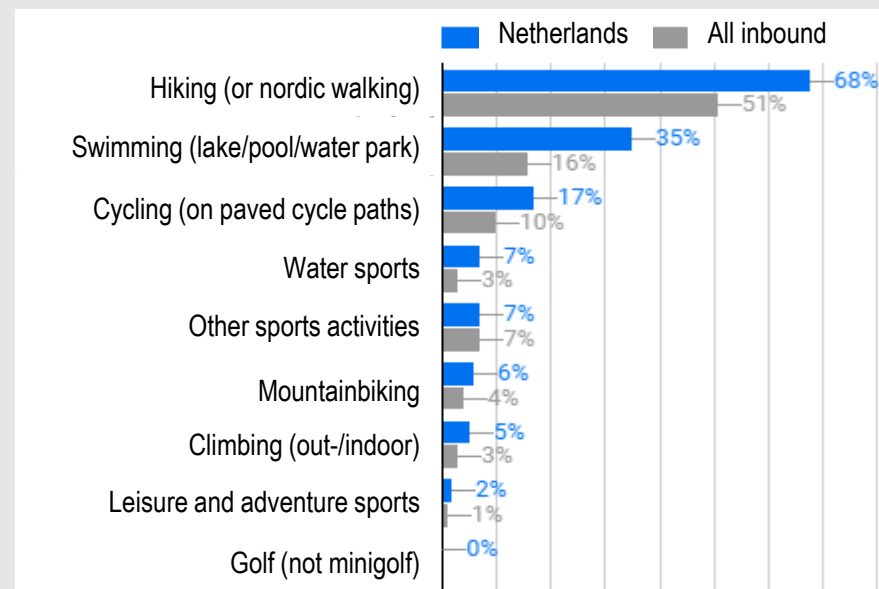
## Inbound leisure visitors with overnight, 2020-2022



### Non-sporting activities



### Sporting activities

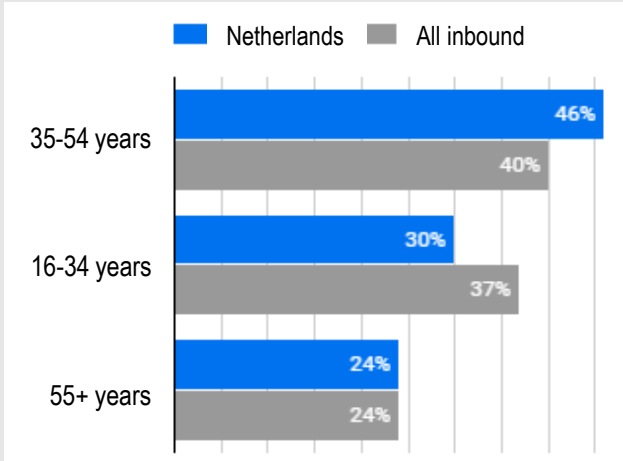


# Transport, travel party, age, repeat visits and cross-border trips

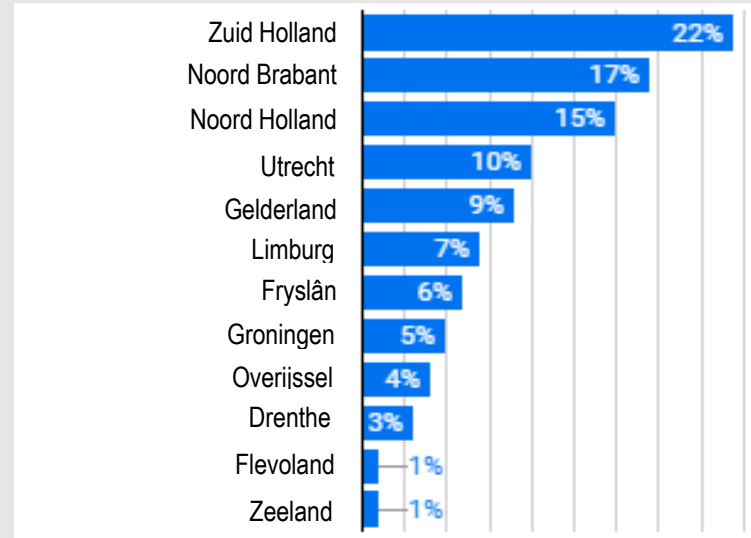
## Inbound leisure visitors with overnight, 2020-2022



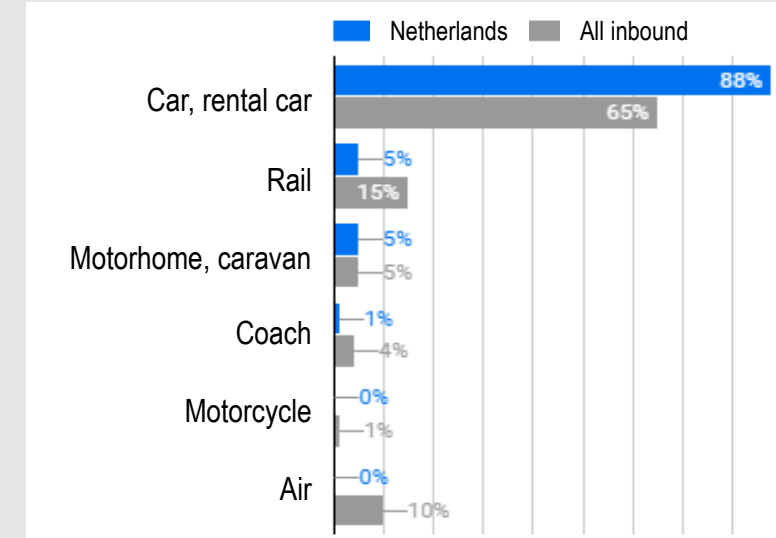
### Age groups



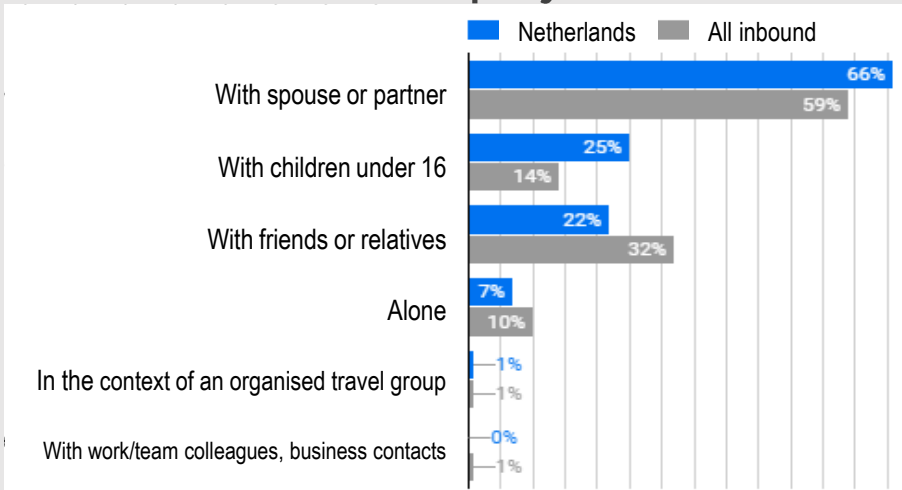
### Region of origin



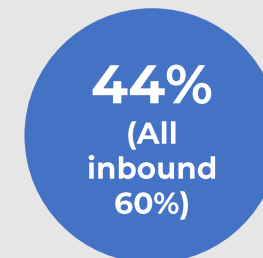
### Mode of transport to access Luxembourg



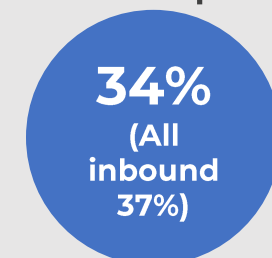
### Travel party



### First-time visitors



### Visitors spending nights in Luxembourg and abroad during same trip

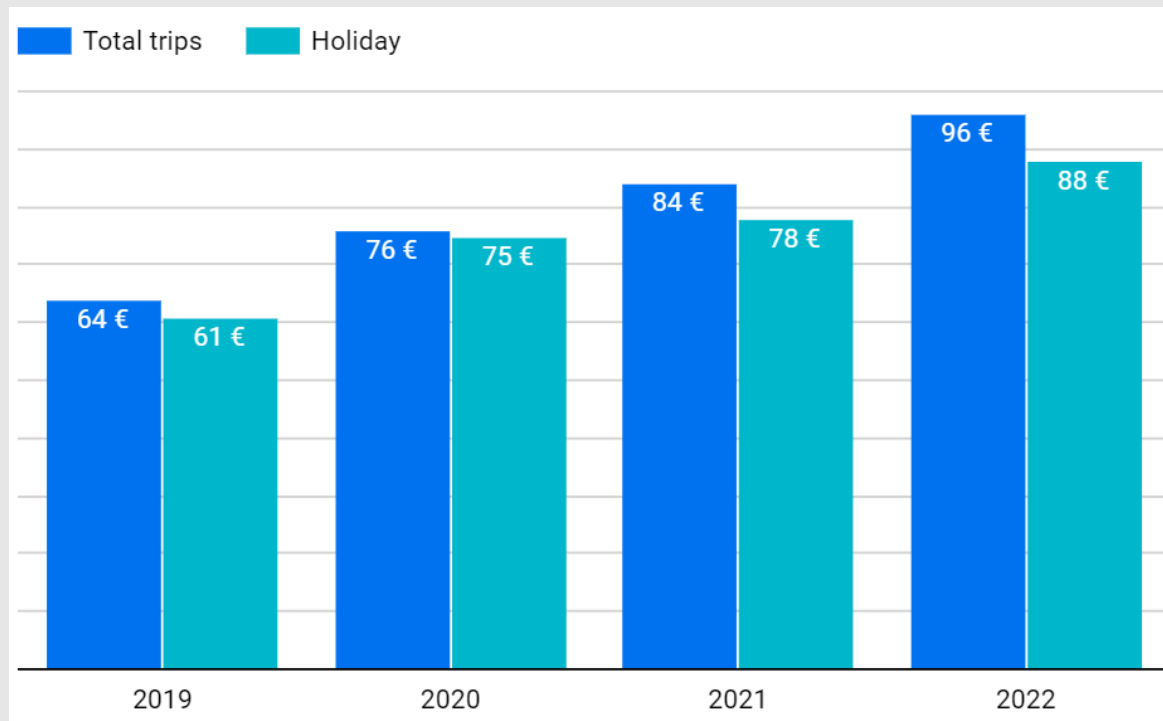


# Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

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



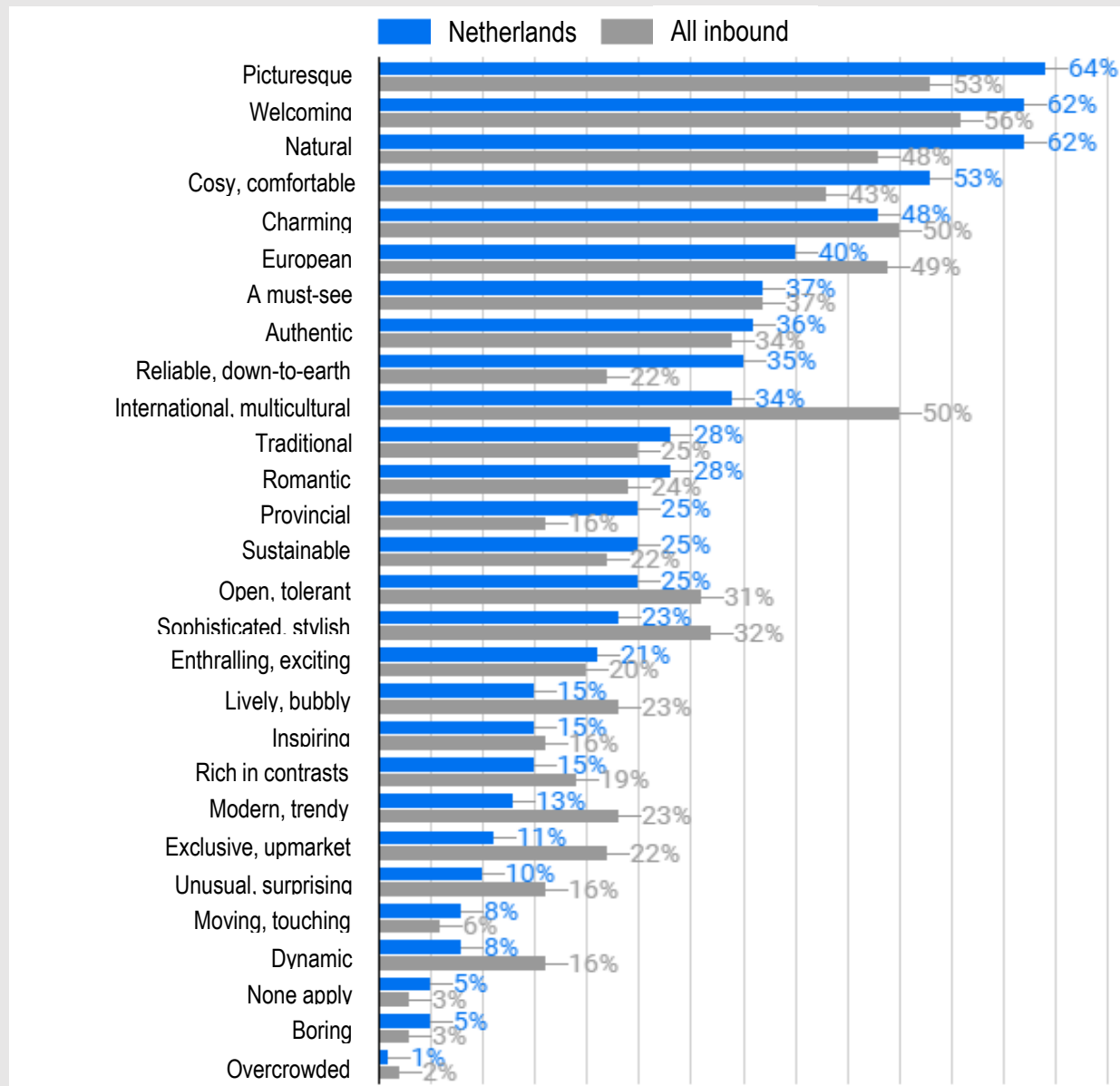
**2022**

**Netherlands to Europe to  
Luxembourg**

Spend/day/pers. on <b>all</b> trips	96 €	124 €
Spend/day/pers. on <b>holiday</b> trips	88 €	118 €

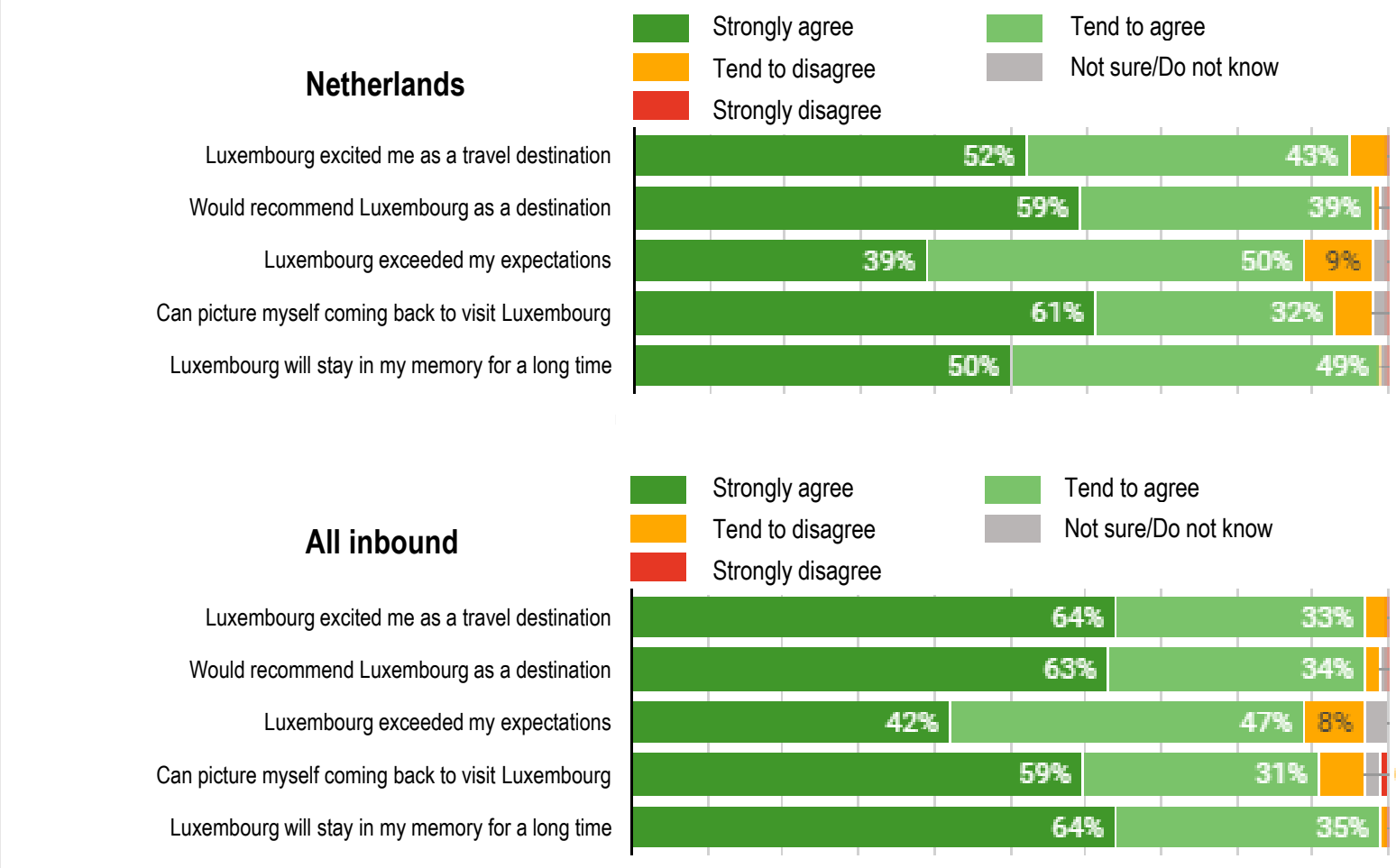
# Image perception of Luxembourg

## Leisure overnight visitors



# Visitor satisfaction and recommendation

## Inbound leisure visitors, 2020-2022



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

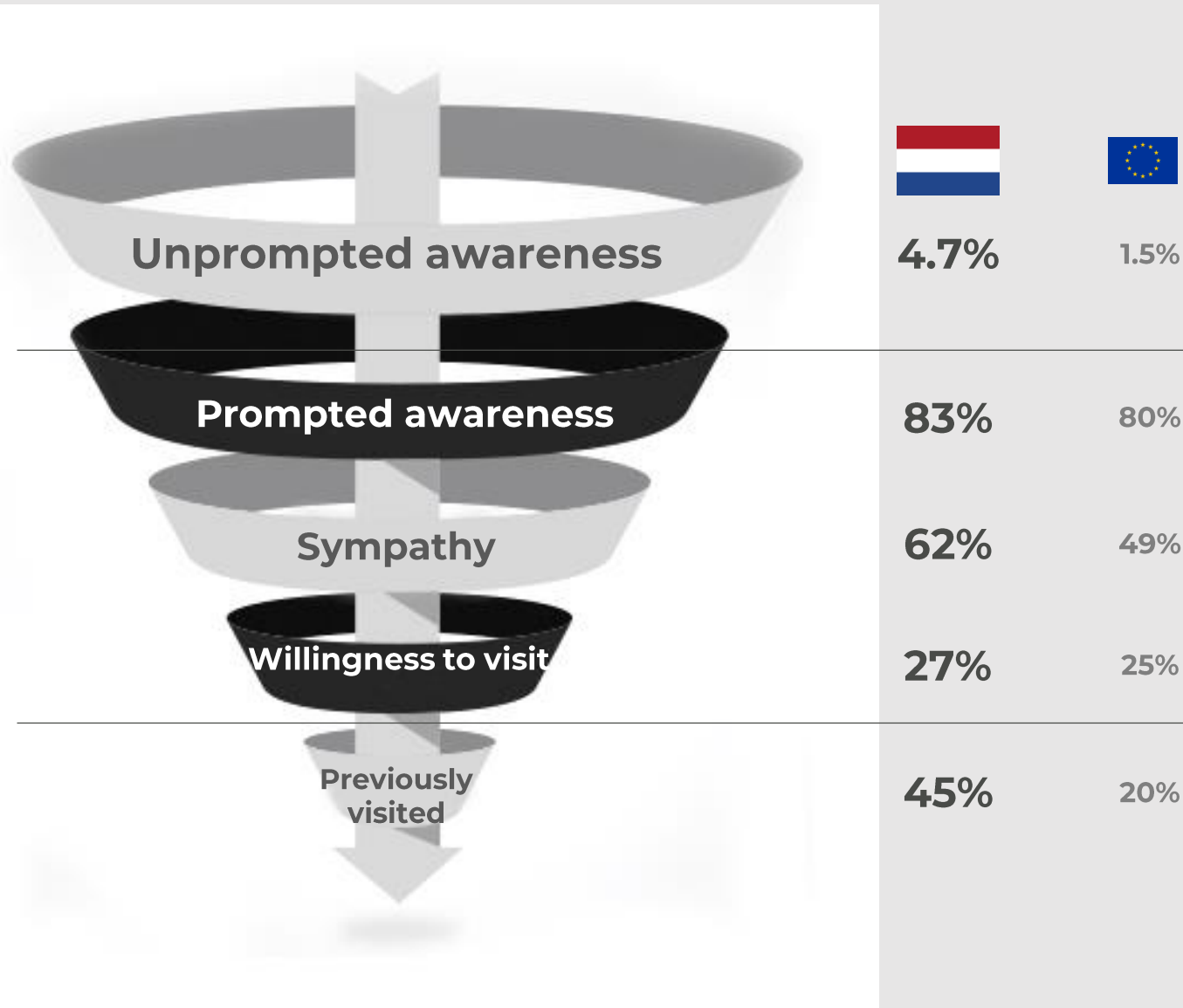




# **Target segments, Brand & Growth Potential**

# Brand Funnel 2021-2022

Assessing Luxembourg's brand strength as a destination



**Total future visitor potential from the Netherlands (\*)**  
3.3 million

**Highest future travel intent from the Netherlands (\*\*)**

1. Perfection Seekers
2. Explorers
3. Short Breakers

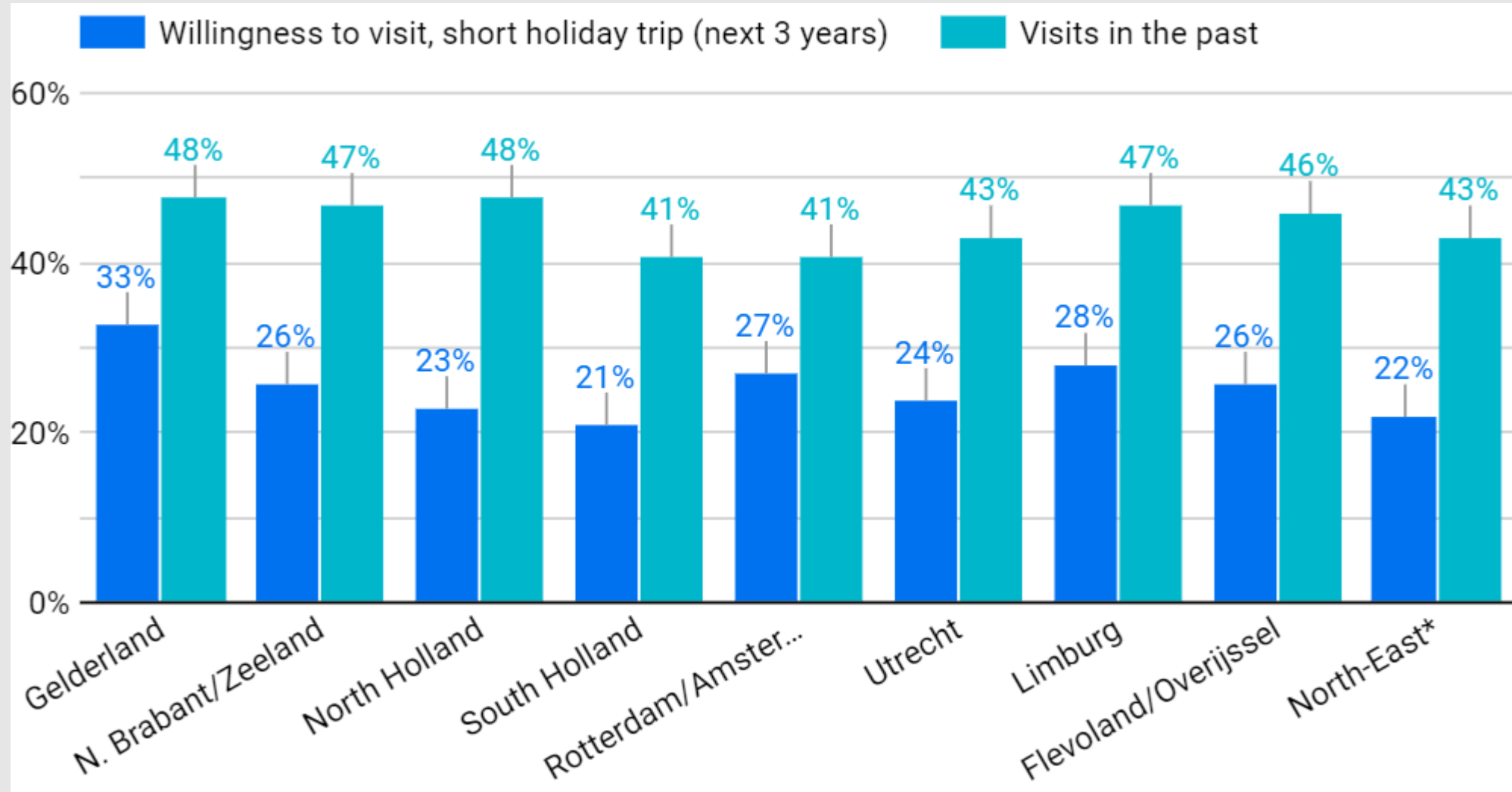
Source: Destination Brand/Inspektour.

(\*) 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



(\*) Drenthe, Fryslân, Groningen

# General theme interest (\*)






Theme			
	Rank	Rank	% interested
<b>Resting/Relaxation</b>	1	<b>1</b>	77%
<b>City</b>	4	<b>2</b>	61%
<b>Nature</b>	3	<b>3</b>	61%
<b>Castles</b>	5	<b>4</b>	57%
<b>Culinary</b>	2	<b>5</b>	55%
<b>Culture</b>	6	<b>6</b>	47%
<b>Shopping</b>	10	<b>7</b>	46%
<b>Luxury</b>	17	<b>8</b>	41%
<b>Nightlife (**)</b>	12	<b>9</b>	37%
<b>History/Unesco</b>	7	<b>10</b>	35%
<b>Camping</b>	20	<b>11</b>	33%
<b>Wellness</b>	13	<b>12</b>	33%
<b>Active-sports</b>	18	<b>13</b>	33%
<b>Industrial heritage</b>	19	<b>14</b>	33%
<b>Events</b>	14	<b>15</b>	33%
<b>Countryside</b>	15	<b>16</b>	32%
<b>Cycling</b>	21	<b>17</b>	31%
<b>Family</b>	11	<b>18</b>	27%
<b>Wine</b>	16	<b>19</b>	26%
<b>Hiking</b>	8	<b>20</b>	26%
<b>Sustainability</b>	9	<b>21</b>	25%
<b>MTB</b>	22	<b>22</b>	19%
<b>Voluntary work</b>	24	<b>23</b>	14%
<b>Motorcycling</b>	23	<b>24</b>	12%

(\*) 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
Resting/Relaxation	2	1	58%
Nature	7	2	56%
Castles	3	3	53%
Camping	15	4	49%
Active-sports	18	5	47%
MTB	20	6	43%
Countryside	17	7	40%
Cycling	13	8	38%
Hiking	10	9	38%
Shopping	5	10	38%
City	1	11	37%
Culture	4	12	35%
Culinary	6	13	34%
Sustainability	12	14	33%
Wellness	9	15	31%
Wine	16	16	28%
Family	14	17	26%
Industrial Heritage	19	18	25%
Nightlife (***)	11	19	23%
History/Unesco	8	20	23%

## Growth potential for themes (\*\*)

- City
- Culinary
- History/Unesco
- Culture
- Industrial Heritage
- Nightlife (\*\*\*)
- Wellness

(\*) 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.

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

# Luxembourg's Brand Value Ratings (\*)



Feature			
	Rank	Rank	% agreeing
<b>Authentic</b>	1	<b>1</b>	48%
<b>Attractive, appealing</b>	4	<b>2</b>	43%
<b>Welcoming, hospitable</b>	2	<b>3</b>	42%
<b>Surprising</b>	5	<b>4</b>	39%
<b>Lot of variety, diversified</b>	6	<b>5</b>	39%
<b>Not crowded, insider tip</b>	8	<b>6</b>	38%
<b>Service-oriented</b>	7	<b>7</b>	32%
<b>Lively, hip</b>	9	<b>8</b>	30%
<b>Sustainable</b>	10	<b>9</b>	25%
<b>Open-minded, tolerant</b>	3	<b>10</b>	19%

(\*) 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.

# Spontaneous associations with Luxembourg



# LFT strategic market focus

## Market prioritisation



Market Priority	Main Objective	Target Segment focus (in decreasing order of importance within category)
		<b>Bold : main focus</b>
<b>2</b>	Activating	Image: <b>PS</b> . Activating: EXP, NLA, SB.

### Theme & segment focus

Theme	Priority	Marketing	Segments
City	1	Image & Activating	PS, EXP
Hiking	3	Image & Activating	PS, NLA
Culinary	2	Image	PS, (EXP)
Culture	4	Image	PS
Industrial Heritage	4	Image	EXP, SB
Countryside	3	Image	EXP, NLA
Wine	3	Image	PS, (SB)
Sustainability	4	Activating	EXP
MTB	4	Image & Activating	EXP, PS

### Brand Value focus

Theme	Priority	Segments
Welcoming	1	PS (EXP)
Open-minded	2	





## Your contact



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