



Luxembourg for Tourism

Market profile NETHERLANDS 2023



Economic indicators & General Travel Demand

Economic indicators - General travel demand

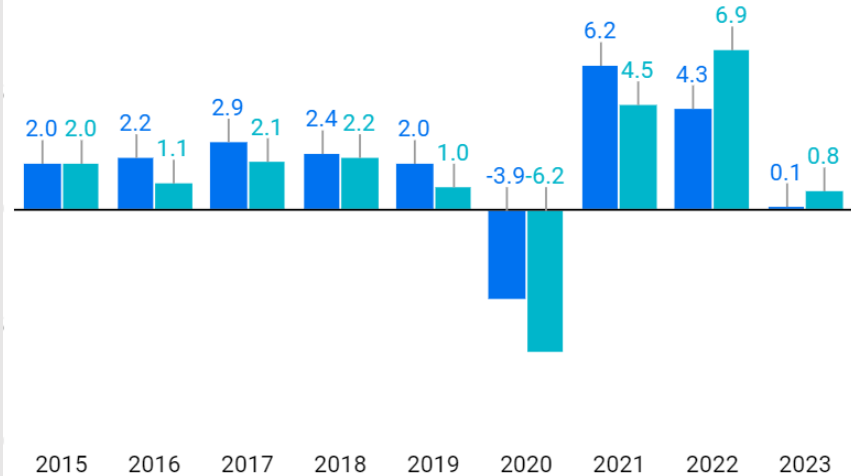


Economy & population

GDP (\$) per capita: **62,719**
 Unemployment (%): **3.6**
 Population (mn): **17.8**
 Inflation (%): **4.1**

GDP and Consumer spending, % annual change

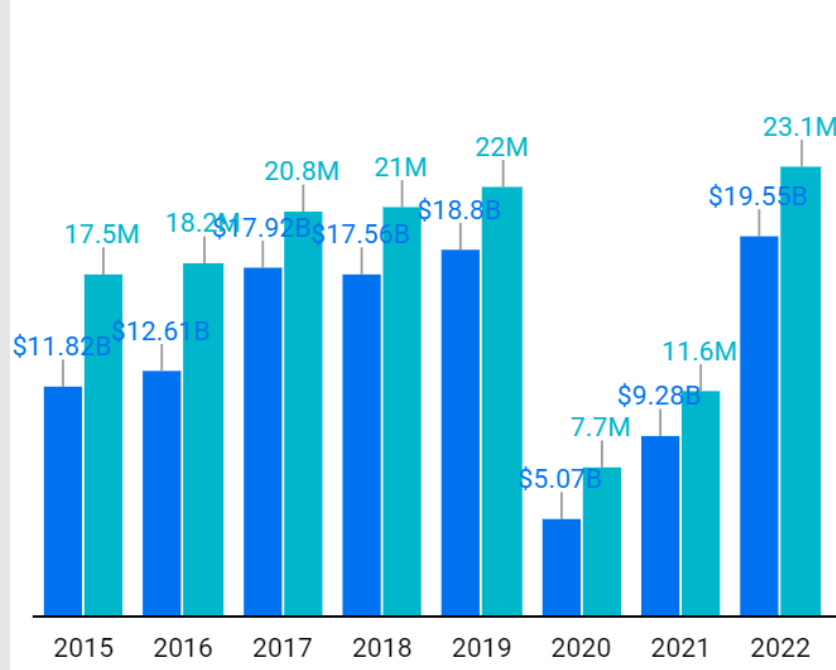
■ GDP change ■ Consumer spend



Share of short trips (1-3 nights),
 % all outbound trips (2022)
27.0%

Outbound trips and travel expenditure

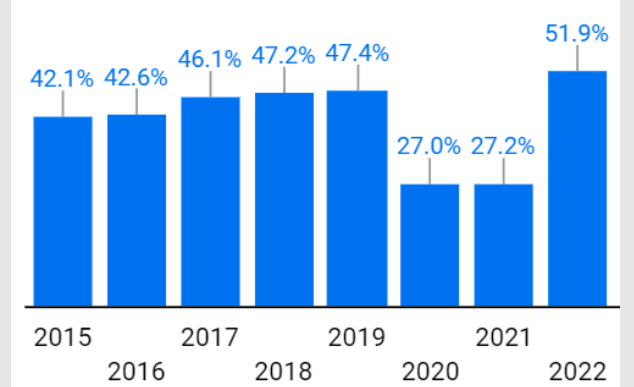
■ Outbound travel expenditure ■ Outbound trips



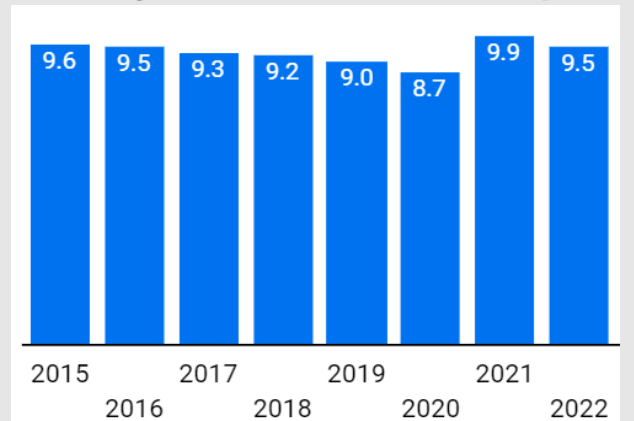
Average spend
 per outbound trip (2019)
853 \$

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 (2022)
92.8%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2023

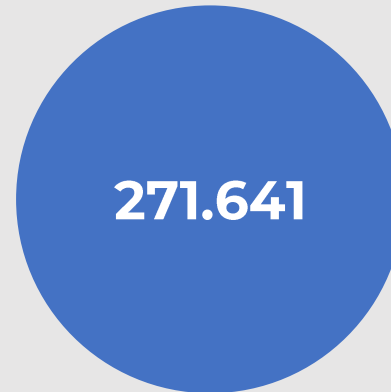


**Nights,
paid accommodation, 2023**



+5% (vs. 2022)
+23% (vs. 2019)

**Arrivals,
paid accommodation, 2023**



+4% (vs. 2022)
+20% (vs. 2019)

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



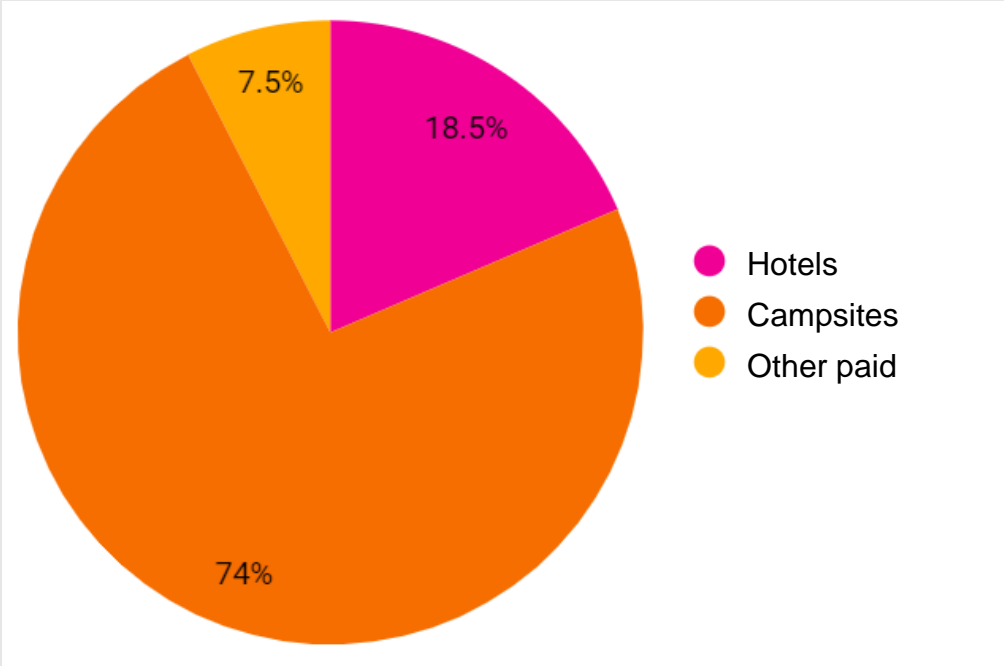
+0.07 days (vs. 2022)
+0.10 days (vs. 2019)

Nights & arrivals in paid accommodation

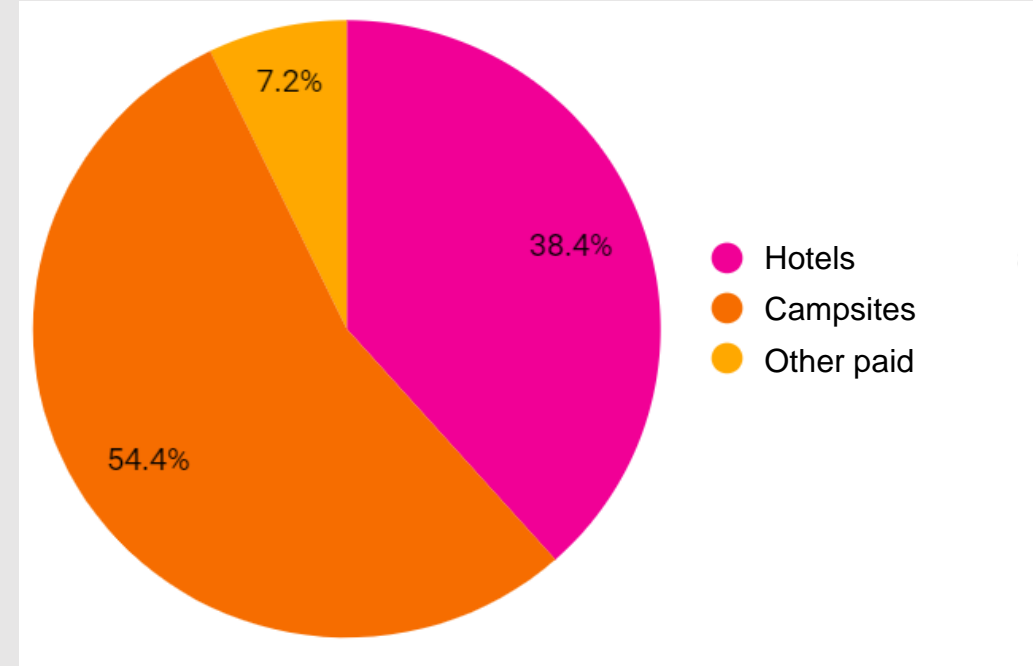


Type of accommodation, 2023

Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



Campsites	730.564	+8% (vs. 2022)	+25% (vs. 2019)
Hotels	183.059	-2% (vs. 2022)	+25% (vs. 2019)
Other paid accomm.	74.189	-3% (vs. 2022)	+4% (vs. 2019)

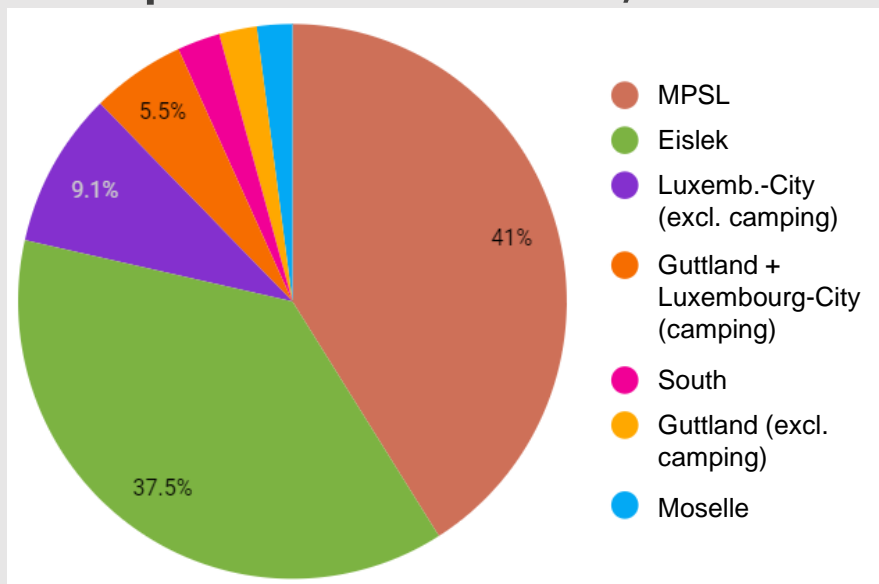
Campsites	147.748	+7% (vs. 2022)	+16% (vs. 2019)
Hotels	104.399	-1% (vs. 2022)	+24% (vs. 2019)
Other paid accomm.	19.494	+8% (vs. 2022)	+26% (vs. 2019)

Nights & arrivals in paid accommodation

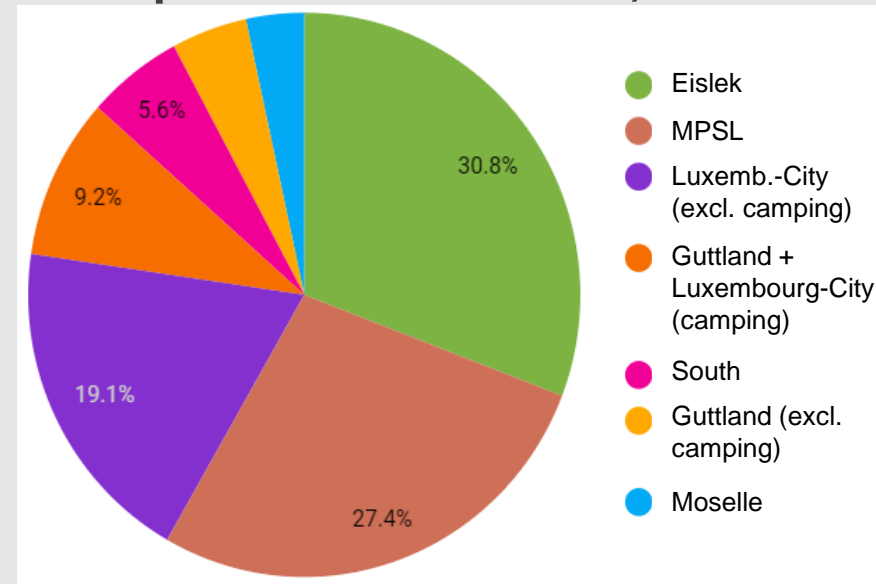
Regions, 2023



Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



MPSL	405.343	+8% (vs. 2022)	+31% (vs. 2019)
Eislek	370.556	+8% (vs. 2022)	+15% (vs. 2019)
Lux.-City (excl. camping)	89.791	-6% (vs. 2022)	+34% (vs. 2019)
Guttland/Lux.-City (camping)	54.701	+2% (vs. 2022)	-2% (vs. 2019)
South	24.866	-7% (vs. 2022)	+54% (vs. 2019)
Guttland (excl. camping)	21.924	-3% (vs. 2022)	+6% (vs. 2019)
Moselle	20.631	+1% (vs. 2022)	+82% (vs. 2019)

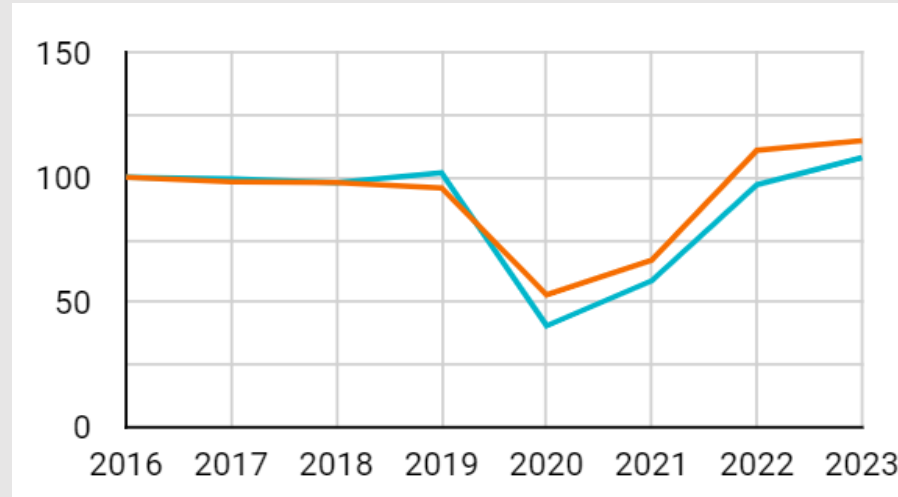
Eislek	83.724	+7% (vs. 2022)	+17% (vs. 2019)
MPSL	74.557	+9% (vs. 2022)	+25% (vs. 2019)
Lux.-City (excl. camping)	51.755	-5% (vs. 2022)	+36% (vs. 2019)
Guttland/Lux.-City (camping)	25.077	-4% (vs. 2022)	-15% (vs. 2019)
South	15.253	+2% (vs. 2022)	+37% (vs. 2019)
Guttland (excl. camping)	12.045	+6% (vs. 2022)	+8% (vs. 2019)
Moselle	9.230	+8% (vs. 2022)	+59% (vs. 2019)

Arrivals in paid accommodation

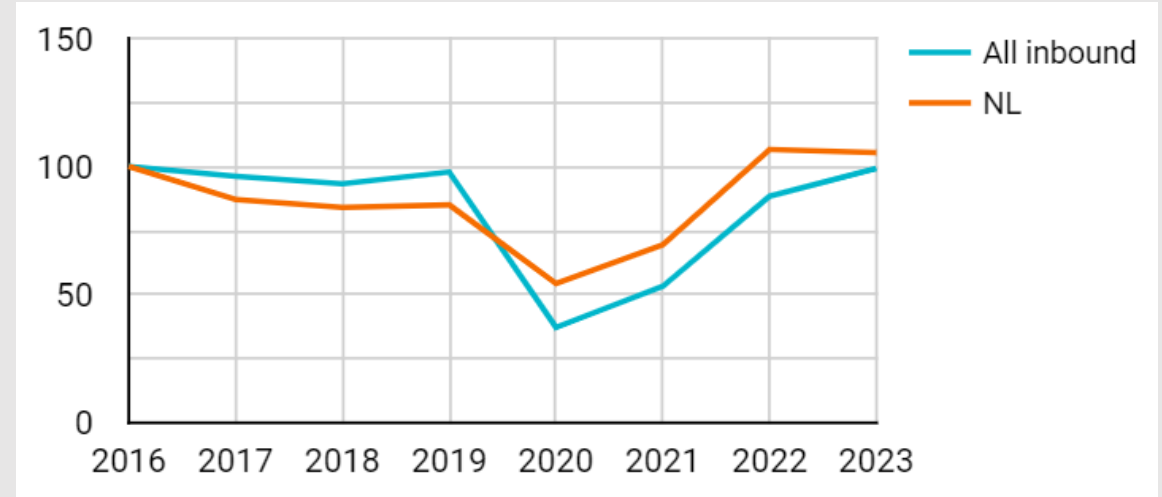
Trends 2016-2023



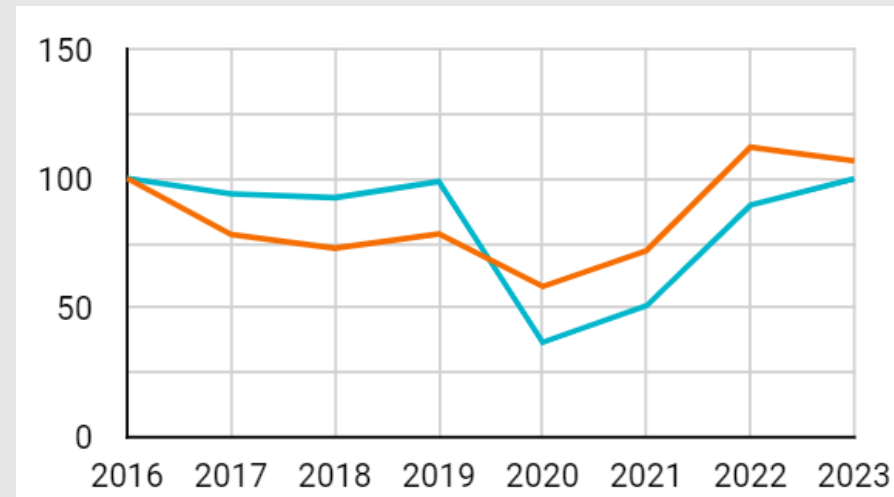
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



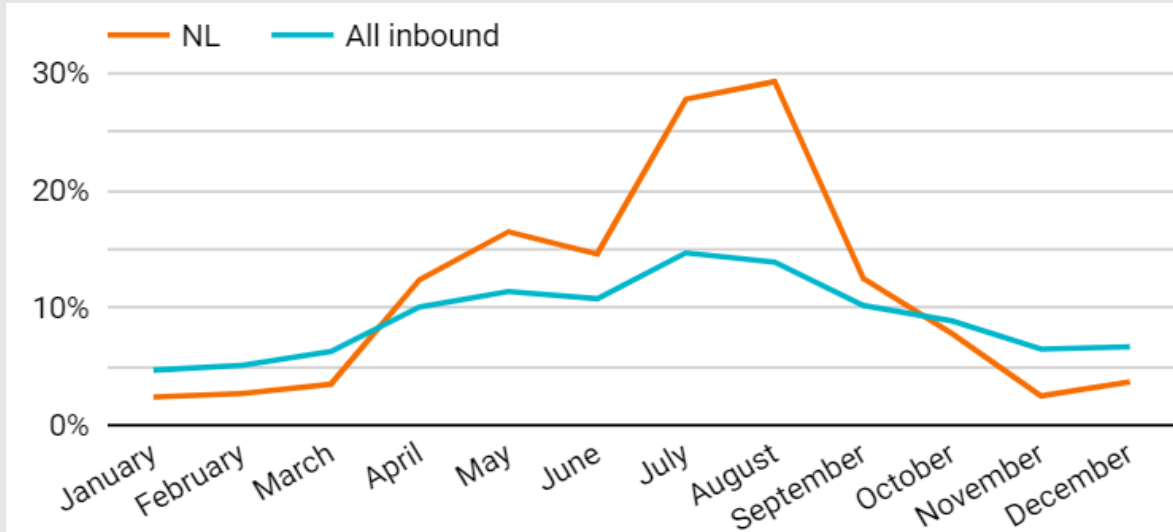
(*), excluding camping.
Source: Statec

Arrivals in paid accommodation

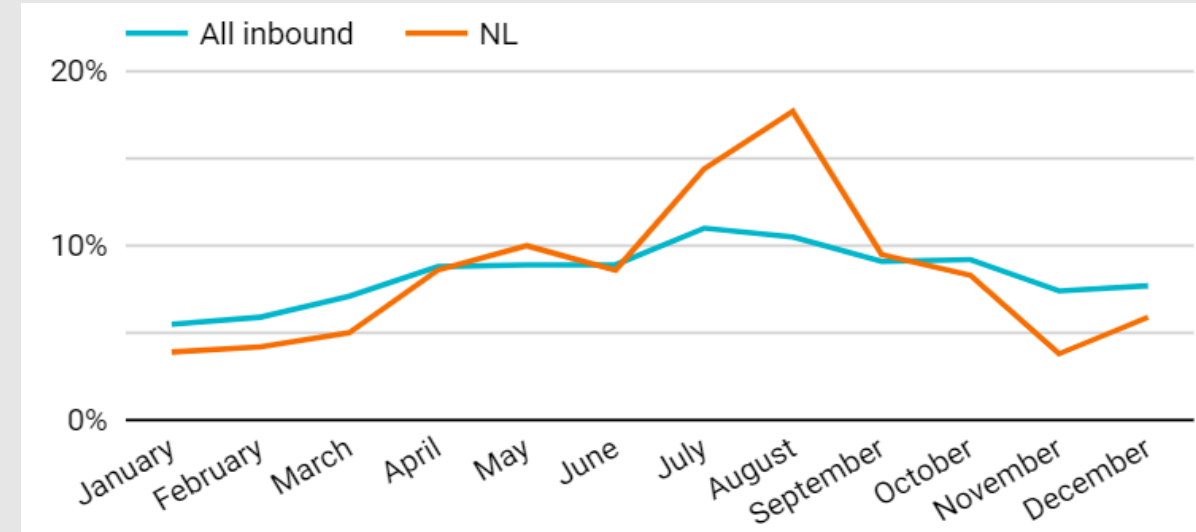
Seasonality



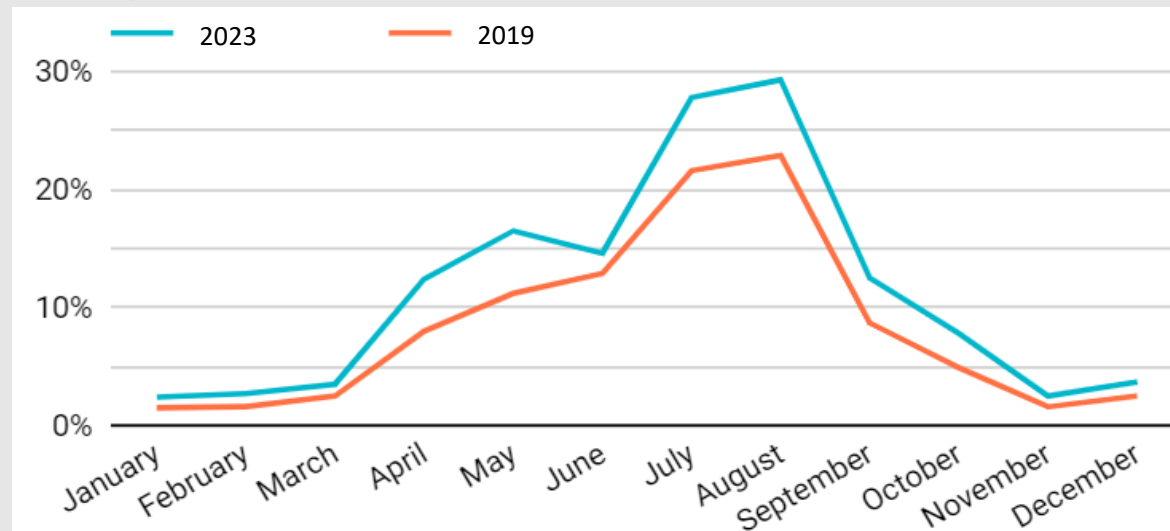
All paid accommodation, 2023



Hotels, 2023



All paid accommodation, arrivals from the Netherlands



Short-term rentals

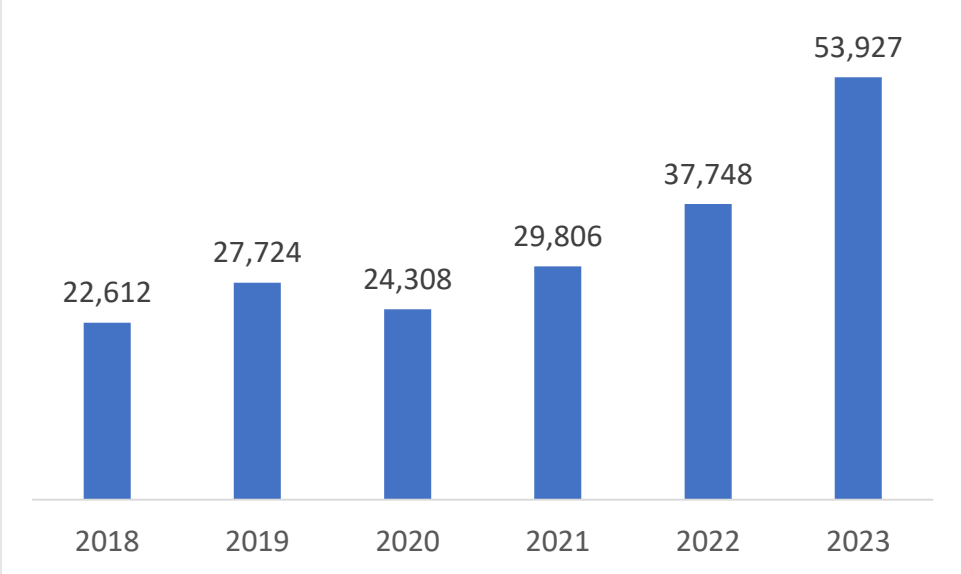


**Nights,
Short-term rentals, 2023**



+43% (vs. 2022)
+95% (vs. 2019)

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





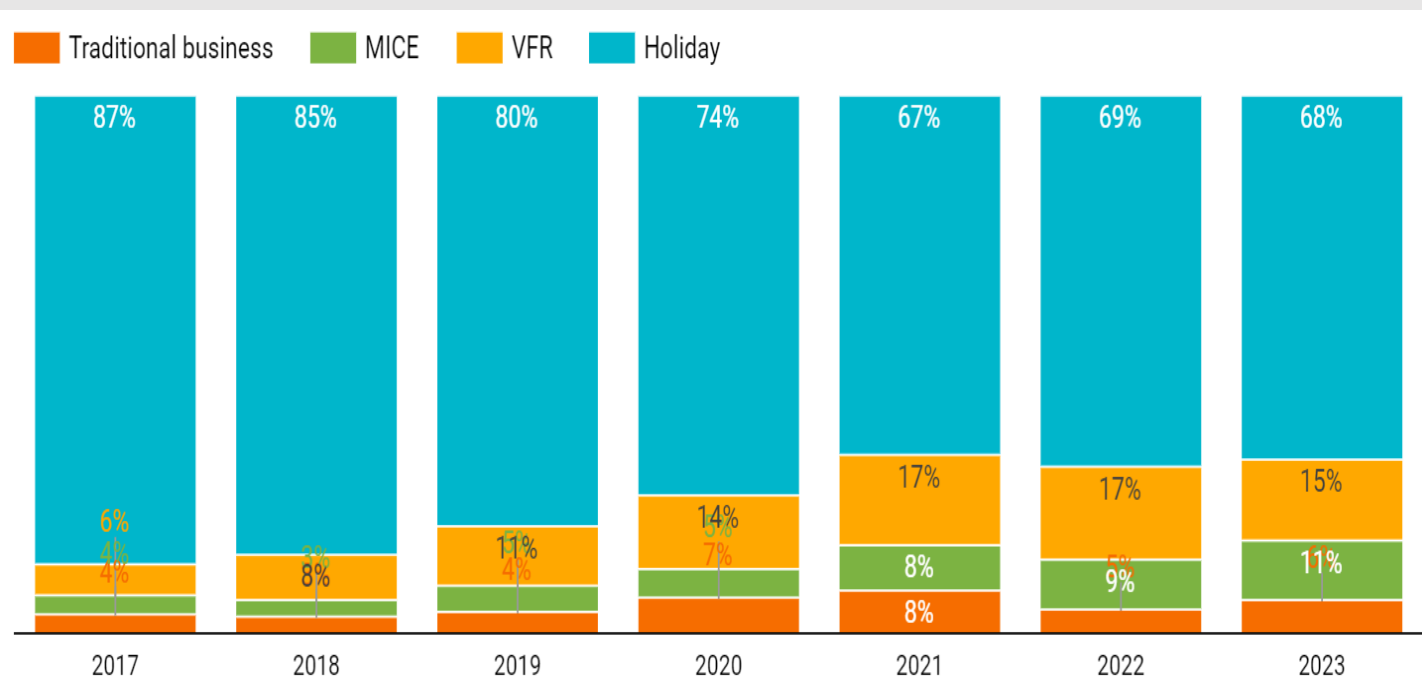
Characteristics of Dutch inbound trips to Luxembourg

Dutch trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2017-2023

Dutch trips to Luxembourg, 2017-2023



2023

Netherlands to Luxembourg vs Europe to Luxembourg

	Netherlands to Luxembourg	Europe to Luxembourg
Holiday	68%	62%
VFR	15%	15%
MICE	11%	14%
Traditional Business	6%	9%



Travel behaviour of Dutch leisure visitors in Luxembourg

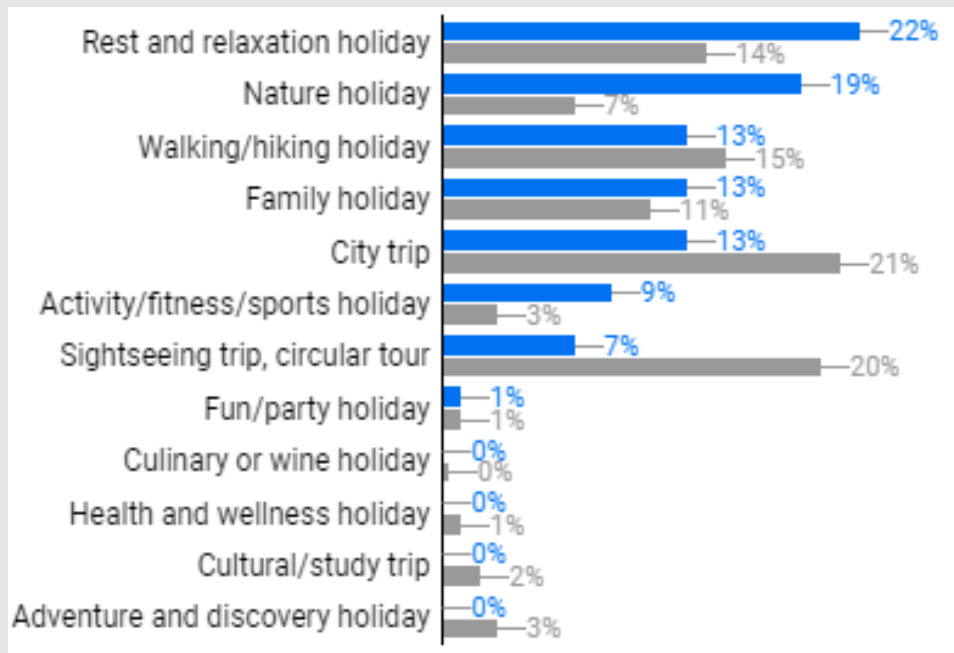
Holiday types

Inbound leisure visitors with overnight, 2023

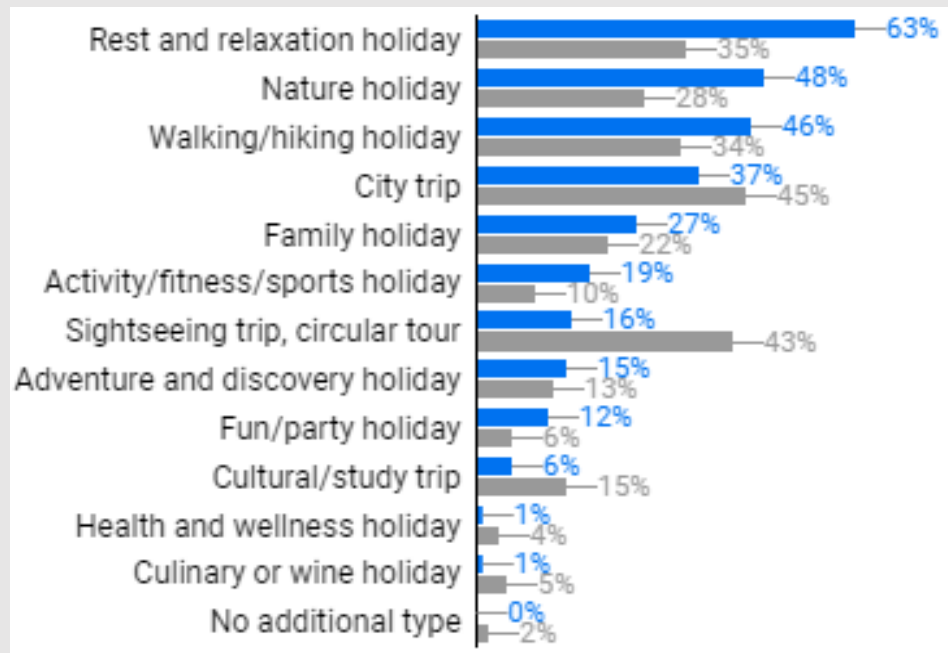


■ Netherlands ■ All inbound

Main holiday types

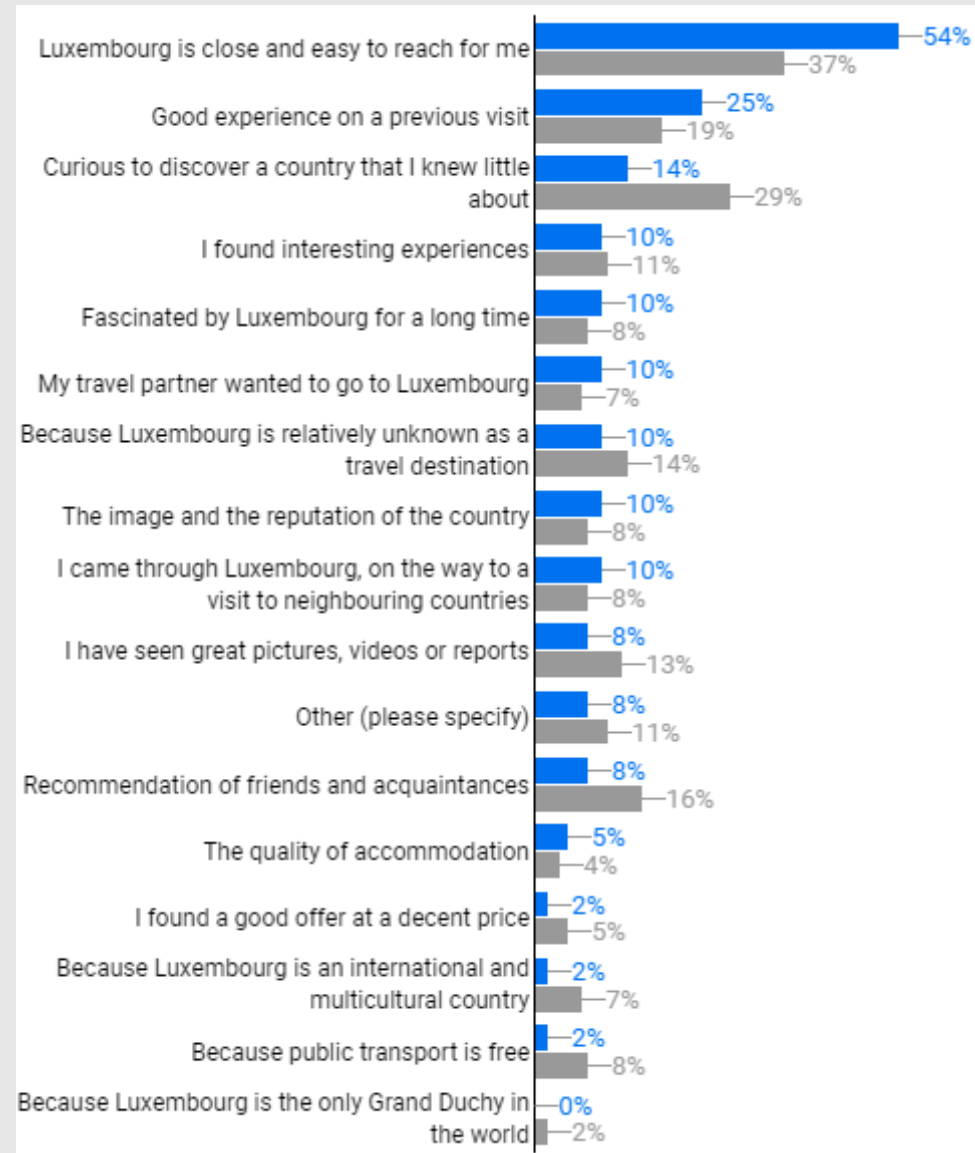
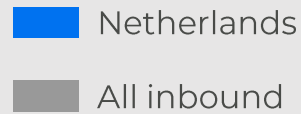


Additional holiday types



Key decision criteria for choosing Luxembourg

Inbound leisure visitors with overnight (*), 2023



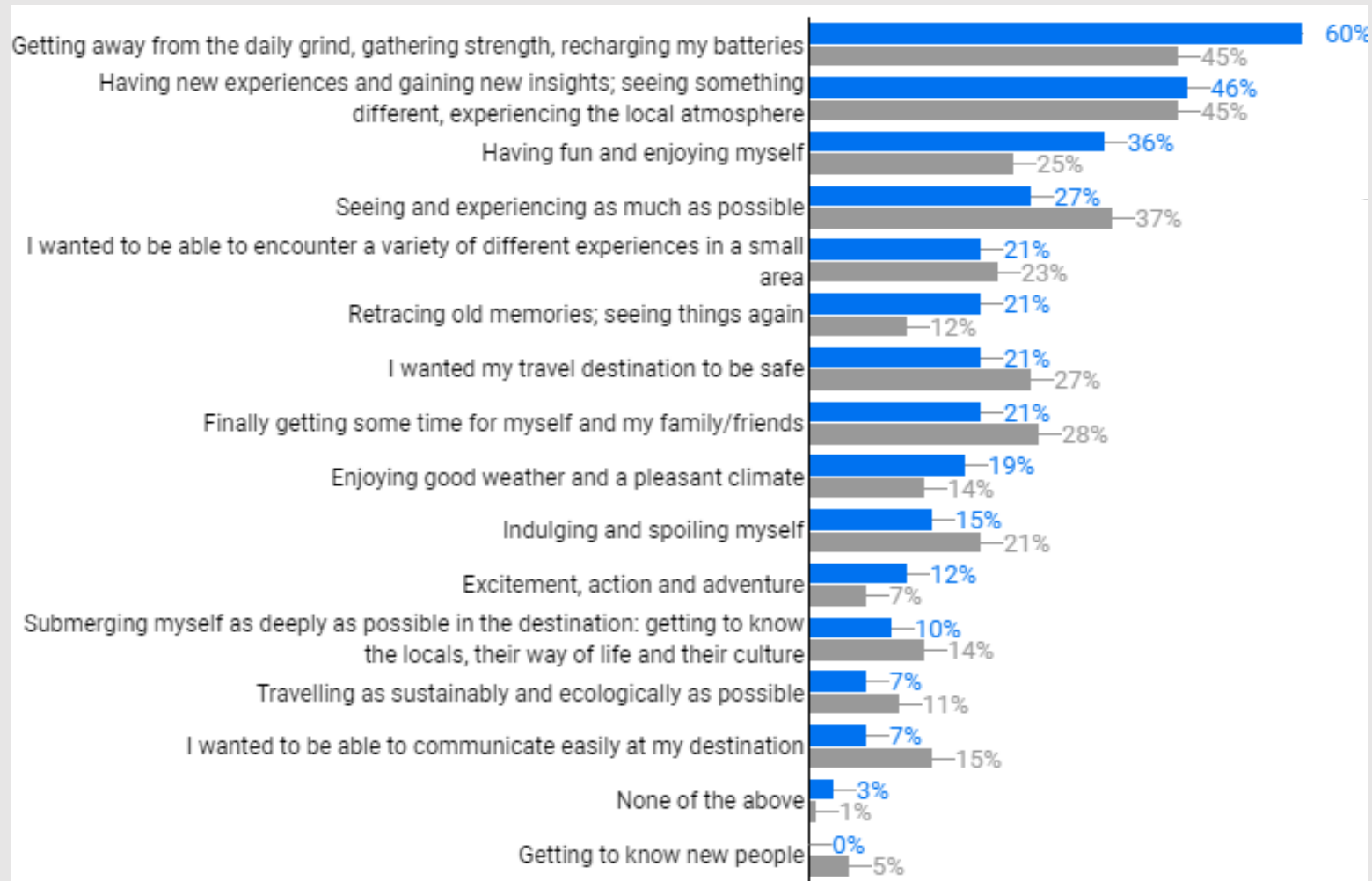
Key travel motivations

Inbound leisure visitors with overnight, 2023



Netherlands

All inbound

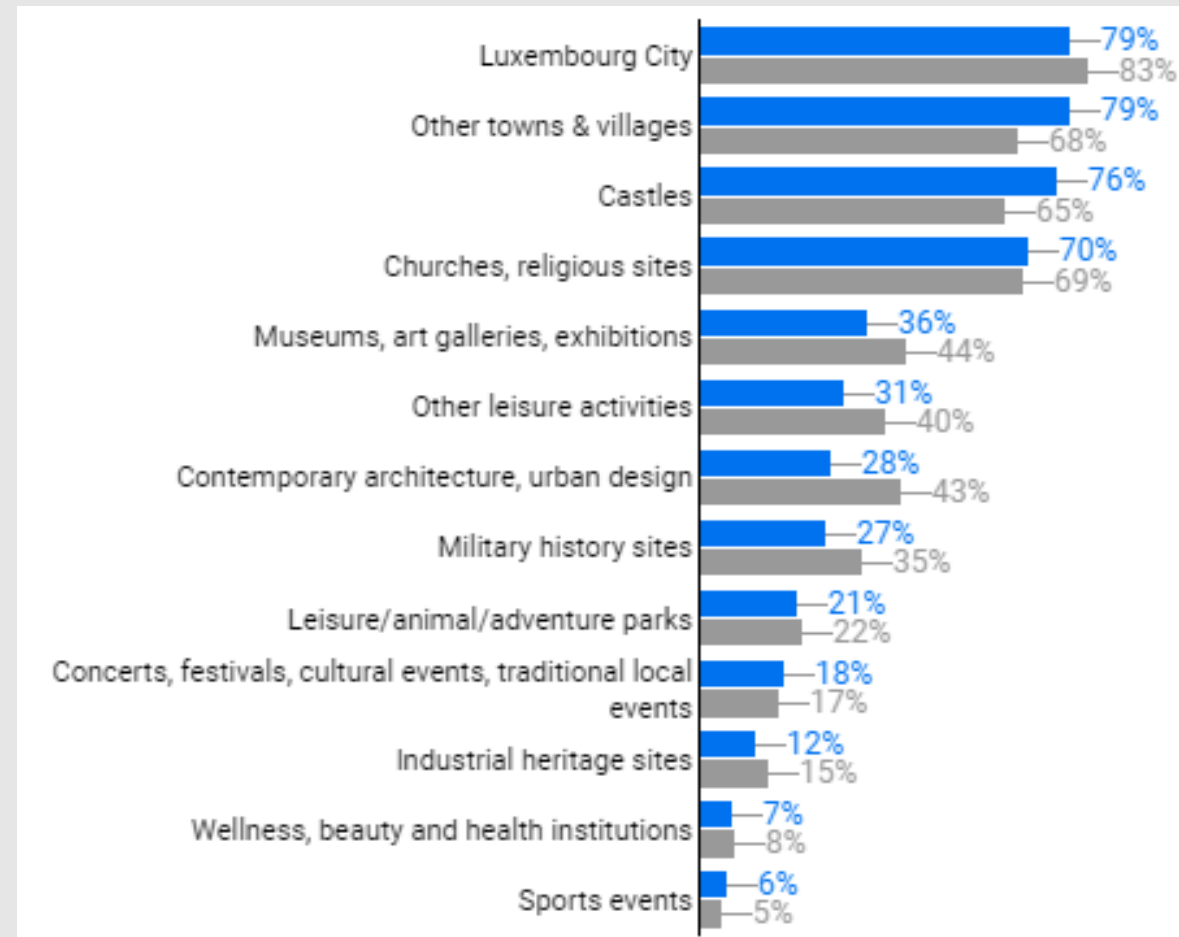




Type of places visited in Luxembourg

Inbound leisure visitors with overnight, 2023

■ Netherlands ■ All inbound

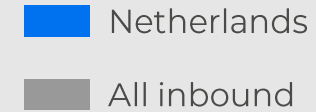


Activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023



Non-sporting activities



Sporting activities



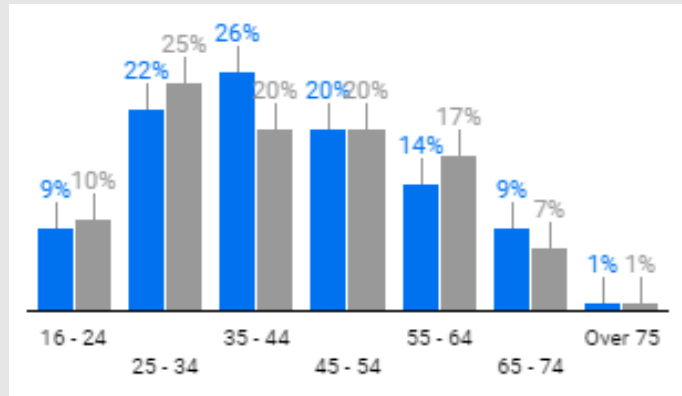
Transport, travel party, age, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2023

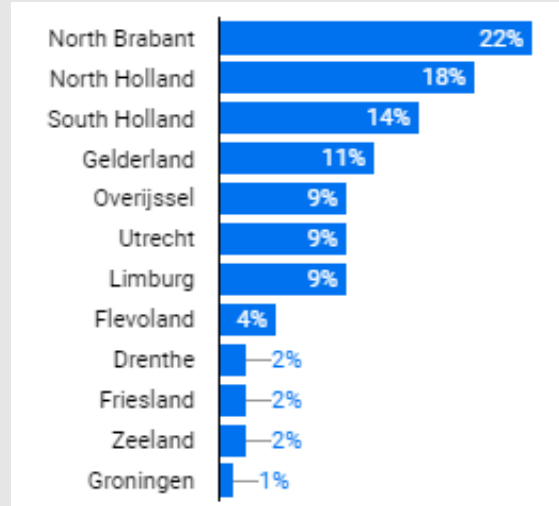


■ Netherlands
 ■ All inbound

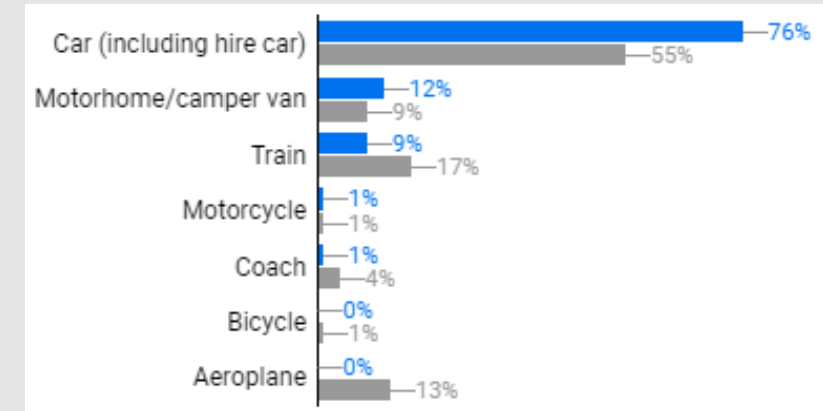
Age groups



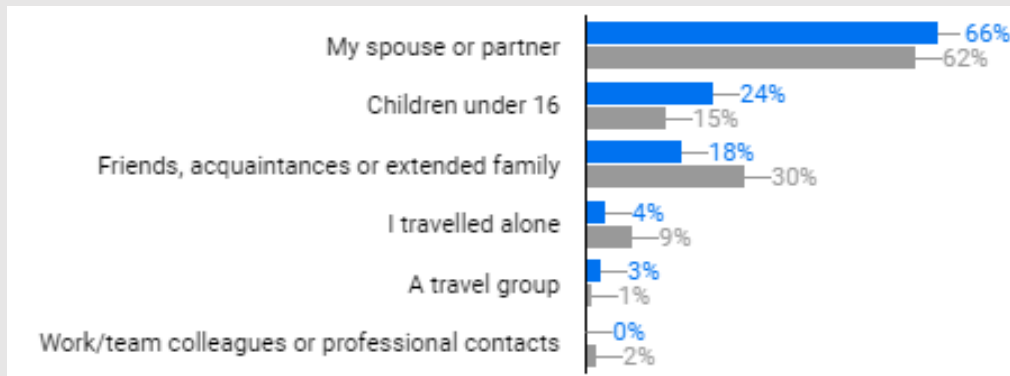
Region of origin



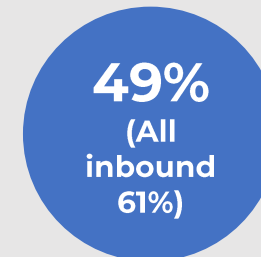
Mode of transport to access Luxembourg



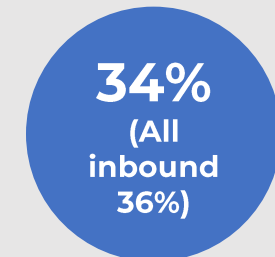
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

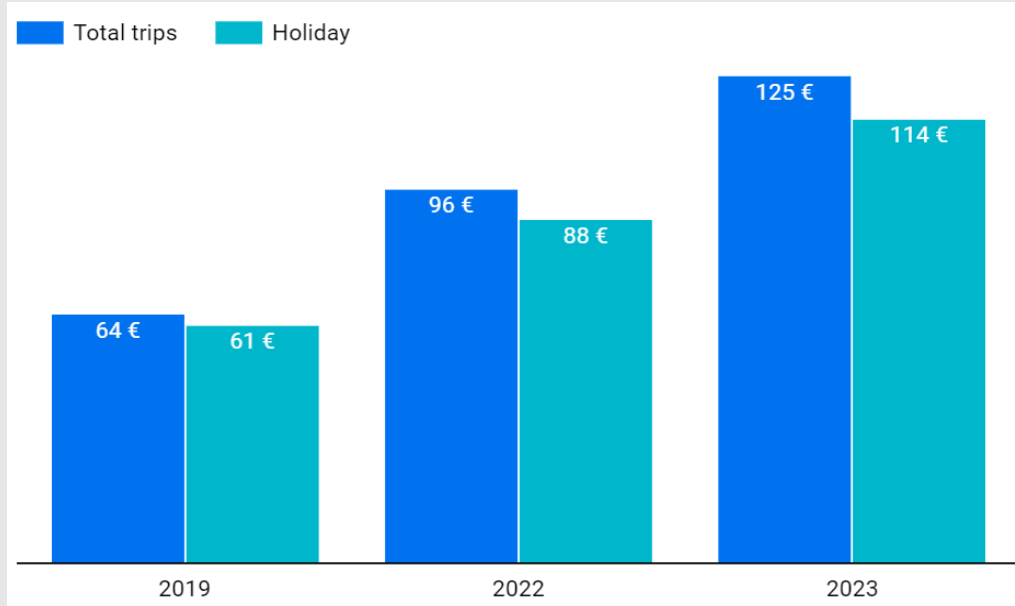


Expenditure and quality vs price orientation

Inbound trips to Luxembourg with overnight



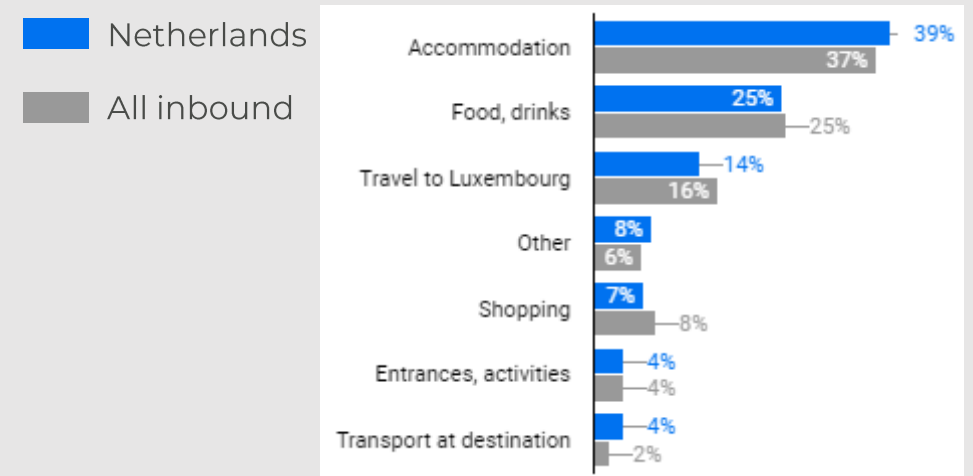
Dutch trips to Luxembourg : average spend per pers. per day



2023

	Netherlands to Luxembourg	Europe to Luxembourg
Spend/day/pers. on all trips	125 €	152 €
Spend/day/pers. on holiday trips	114 €	144 €

Expenditure of leisure inbound overnight visitors by categories, 2023



Quality vs. price orientation

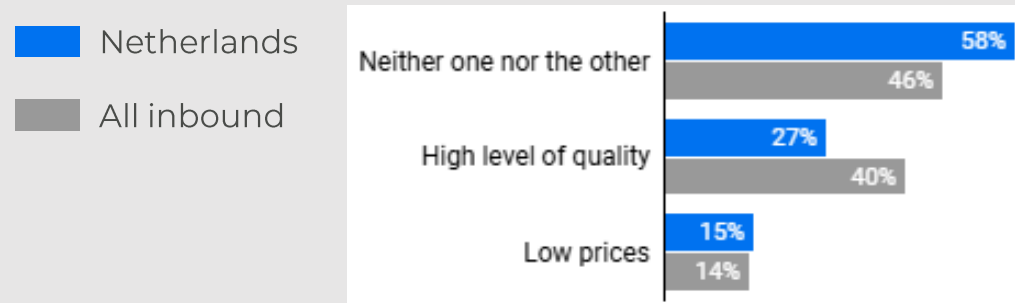
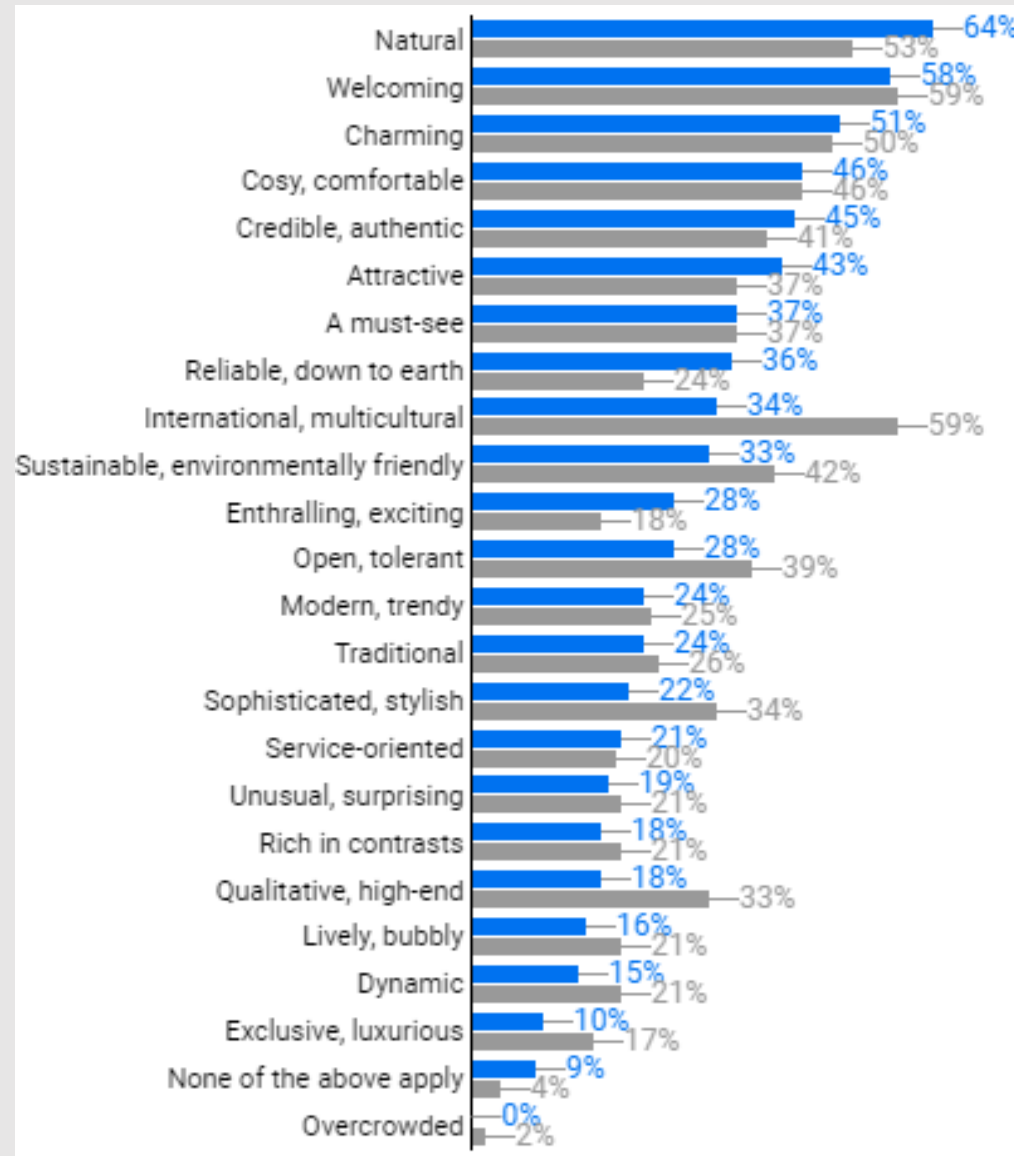


Image perception of Luxembourg

Inbound leisure visitors with overnight, 2023

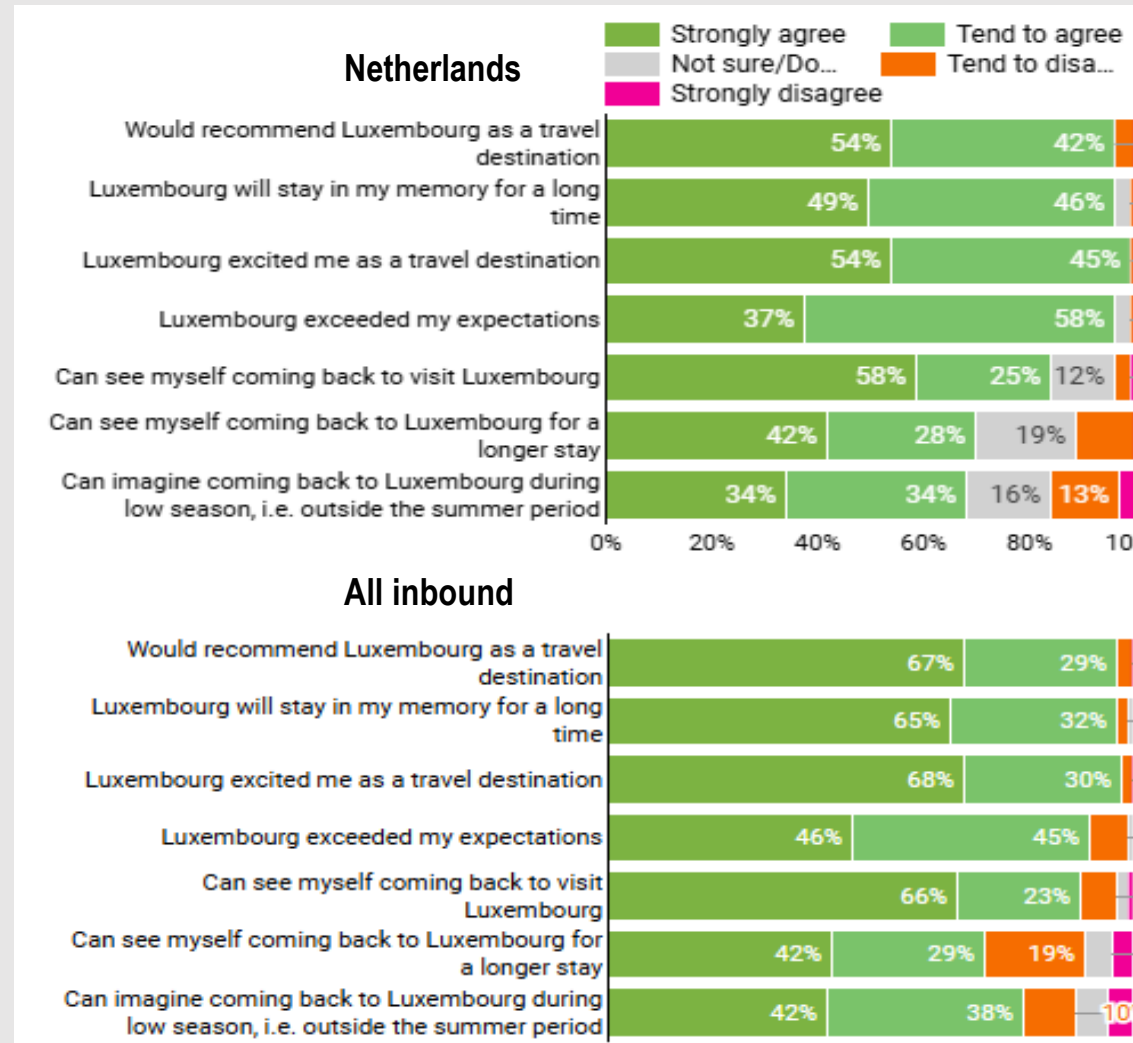


■ Netherlands
■ All inbound





Visitor satisfaction and recommendation

Inbound leisure visitors with overnight, 2023

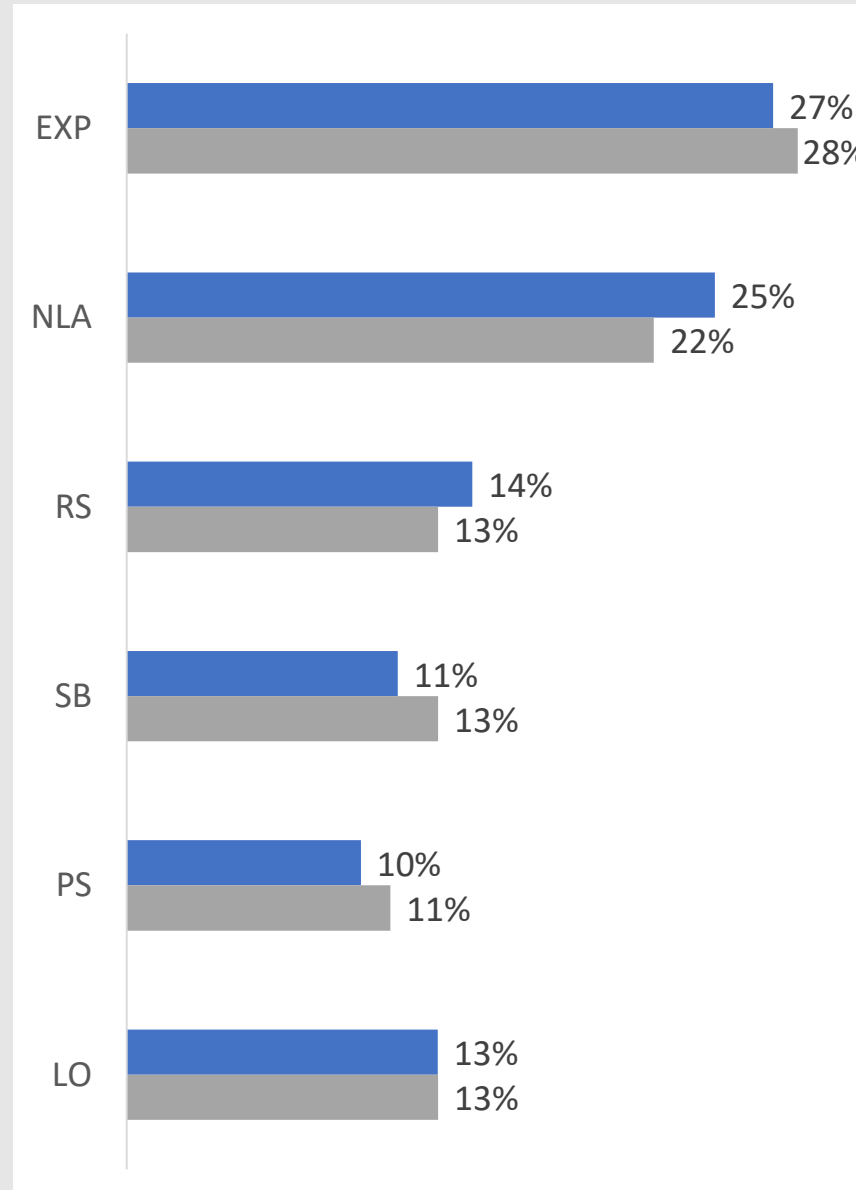


LFT Target Segments



 Netherlands
 All inbound

- Explorers**
- Nature-Loving Actives**
- Relaxation Seekers**
- Short Breakers**
- Perfection Seekers**
- Leisure-Oriented**

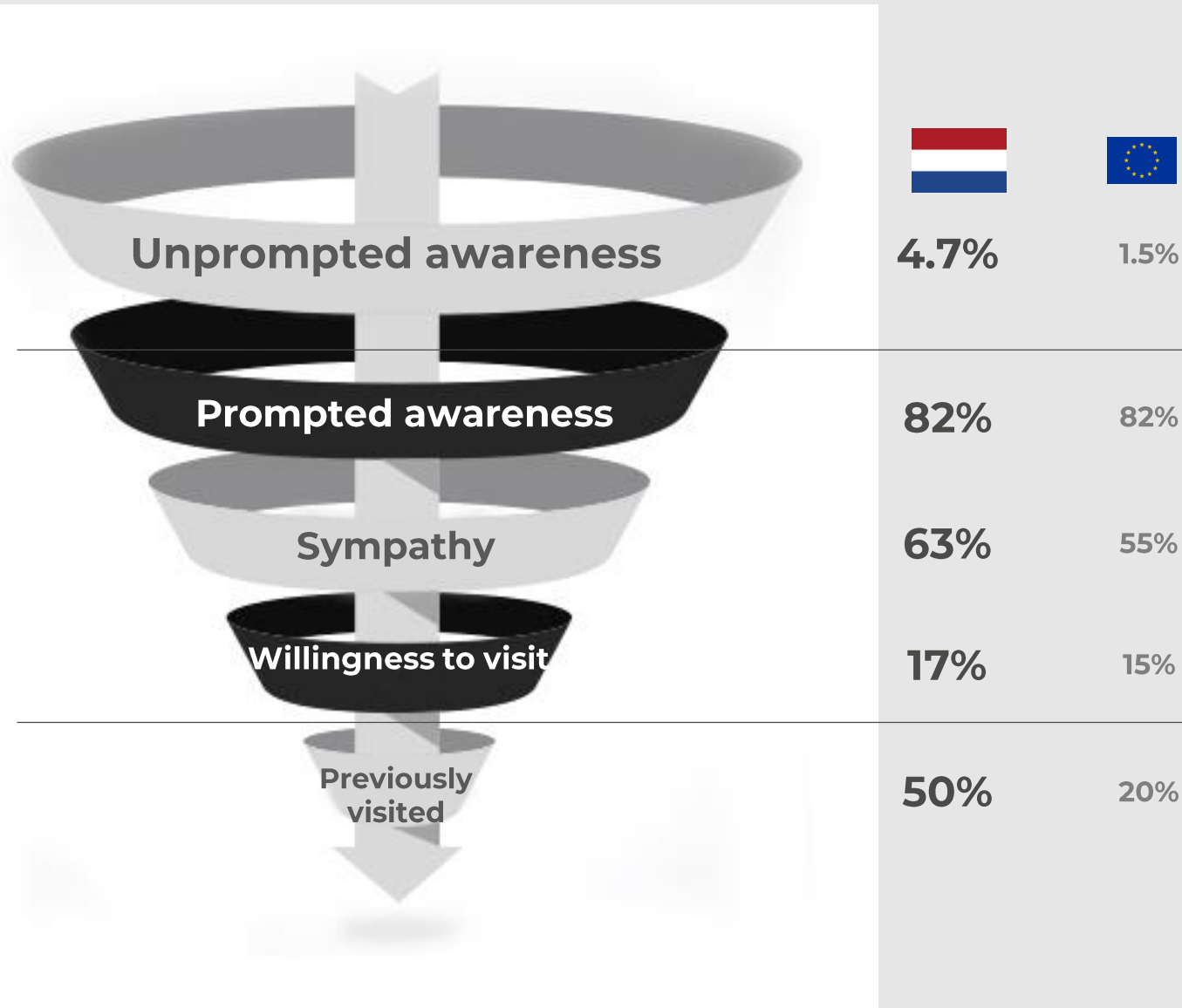




Brand strength & Growth potential

Brand Funnel 2024

Assessing Luxembourg's brand strength as a destination

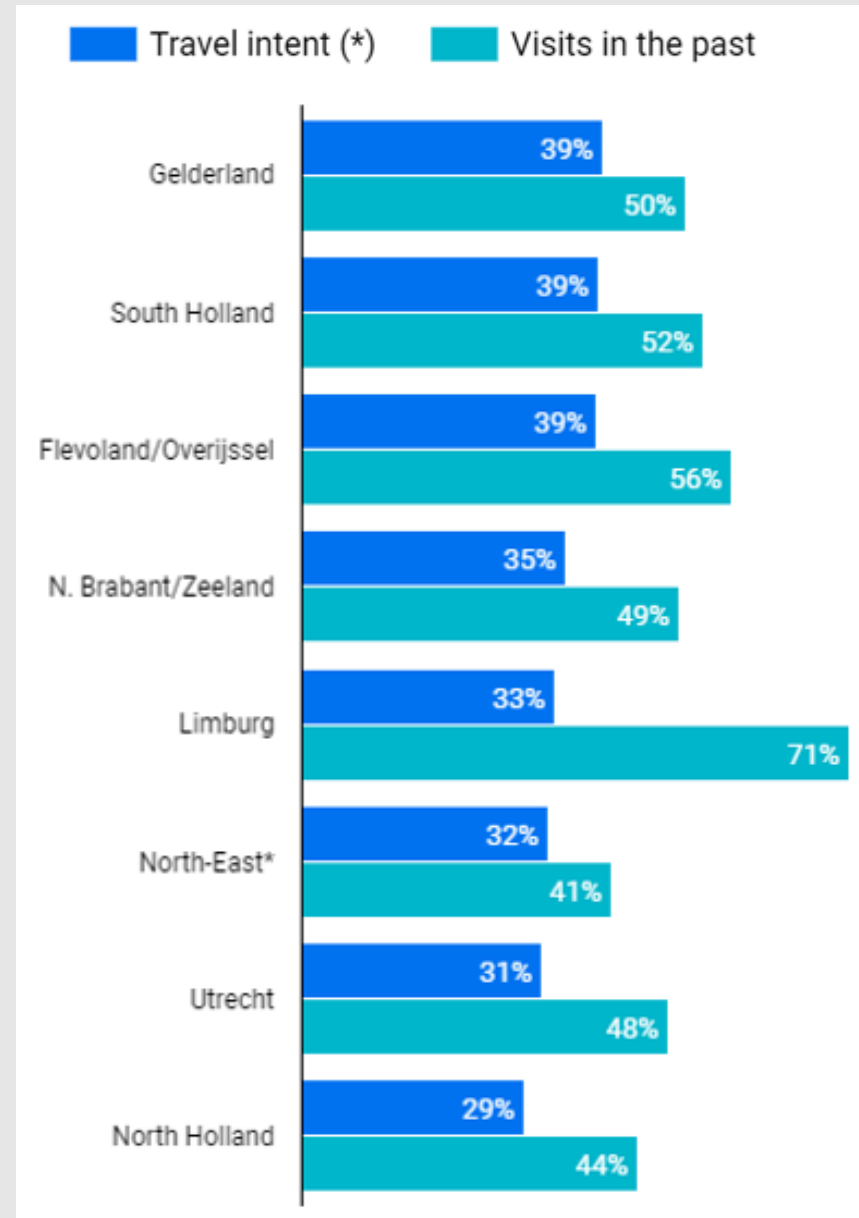


**Core future visitor potential
from the Netherlands (*)**
2.2 million

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
Resting/Relaxation	1	1	70%
Nature	3	2	68%
Culinary	2	3	68%
Sightseeing	4	4	66%
Architecture/townscapes	7	5	63%
City	5	6	62%
Fun/entertainment	8	7	62%
Family	12	8	62%
Hiking	17	9	61%
Immersive travel	6	10	61%
Castles	9	11	58%
Culture	11	12	57%
History/Unesco	10	13	56%
Adventure/action	19	14	54%
Exchanging with locals	13	15	54%
Luxury	24	16	52%
Learning/new skills	14	17	51%
Sustainability	15	18	50%
Shopping	23	19	49%
Events	16	20	48%
Nightlife (**)	20	21	48%
Active-sports	27	22	47%
Cycling	31	23	47%
Countryside	22	24	46%
Wine	21	25	46%
Travelling by train	18	26	45%
Remembrance	26	27	45%
Camping	29	28	45%
Industrial heritage	28	29	42%
Wellness	25	30	41%
Film locations	30	31	39%
MTB	32	32	35%
Motorcycling	33	33	34%




(*) 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	54%
Hiking	11	2	52%
Resting/Relaxation	2	3	44%
Family	8	4	36%
Castles	7	5	35%
Camping	19	6	32%
Architecture/townscapes	4	7	31%
Culinary	3	8	30%
City	1	9	29%
MTB	25	10	28%
Cycling	20	11	26%
Active-sports	21	12	26%
Culture	6	13	22%
Adventure/action	22	14	22%
Countryside	17	15	22%
Luxury	9	16	22%
Fun/entertainment	13	17	21%
History/Unesco	12	18	21%
Shopping	10	19	21%
Wine	15	20	19%
Sustainability	18	21	16%
Wellness	16	22	15%
Nightlife (***)	14	23	15%
Remembrance	26	24	13%
Industrial heritage	24	25	11%
Events	23	26	10%

Growth potential for themes (**)

- Resting/relaxation
- City
- Culinary
- Architecture/townscapes
- Fun/entertainment
- Culture & Events
- History/Unesco
- Luxury
- Sustainability
- Shopping
- Nightlife (***)
- Industrial Heritage

(*) 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).

Luxembourg's Brand Value Ratings (*)



Feature			
	Rank	Rank	% agreeing
safe	1	1	49%
clean	2	2	40%
welcoming, hospitable	4	3	36%
authentic, real	5	4	31%
of high quality	3	5	30%
attractive, appealing	7	6	29%
open-minded, tolerant, international	6	7	25%
surprising	11	8	25%
service oriented	10	9	24%
affordable	16	10	22%
varied, diversified	12	11	21%
exclusive, luxurious	8	12	19%
not overcrowded / insider tip	14	13	18%
lively, trendy	13	14	17%
dynamic, modern	9	15	17%
sustainable	15	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.

Spontaneous associations with Luxembourg





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