Luxembourg for Tourism
Market profile
SWITZERLAND
2022

Economic indicators & General Travel Demand
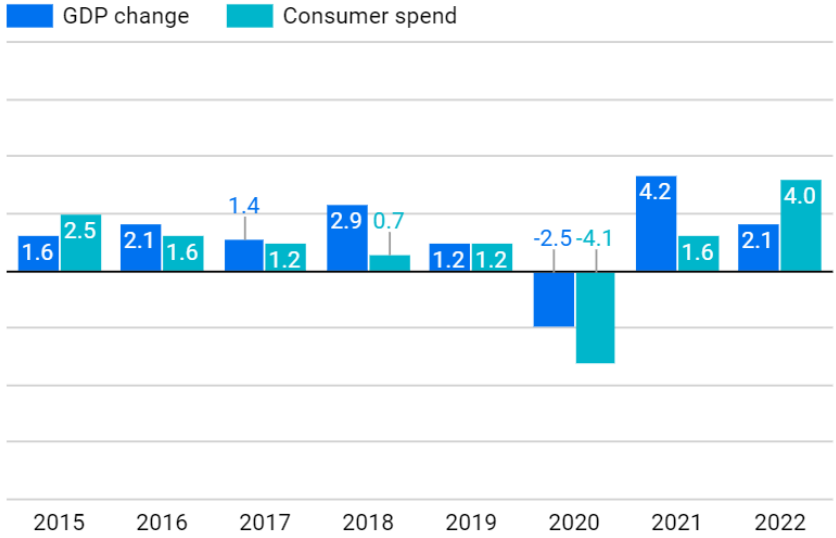
Economic indicators – General travel demand
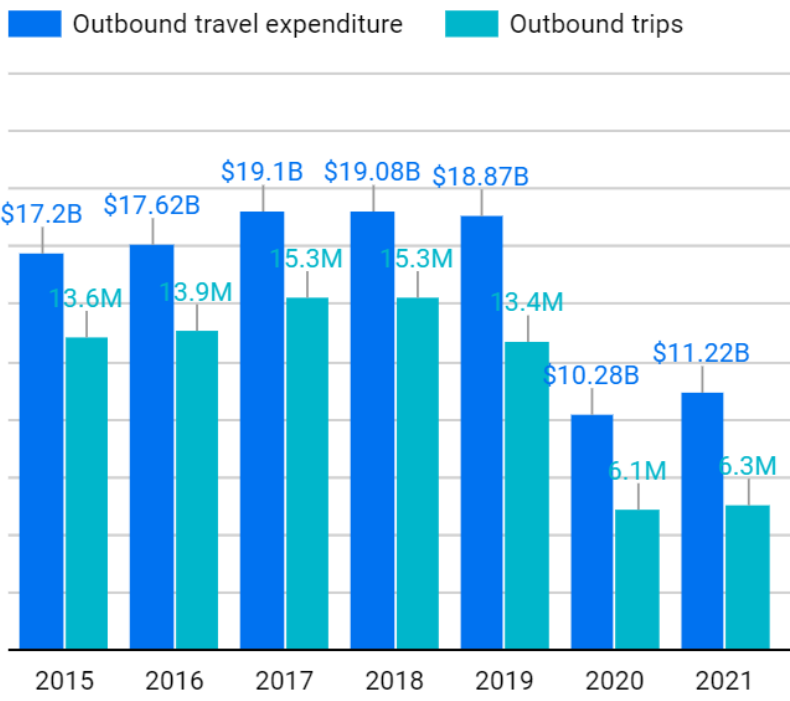
Economy & population

GDP (PPP) per capita	Unemployment (%)	Population (mn)	Inflation (%)
$71,231	**2.6**	**8.7**	**2.8**

GDP and Consumer spending, % annual change

- GDP change
- Consumer spend

	2015	2016	2017	2018	2019	2020	2021	2022
GDP change	1.6	2.1	1.4	2.9	1.2	-2.5	4.2	2.1
Consumer spend	2.5	1.6	1.2	0.7	1.2	-4.1	1.6	4.0

Outbound trips and travel expenditure

- Outbound travel expenditure
- Outbound trips

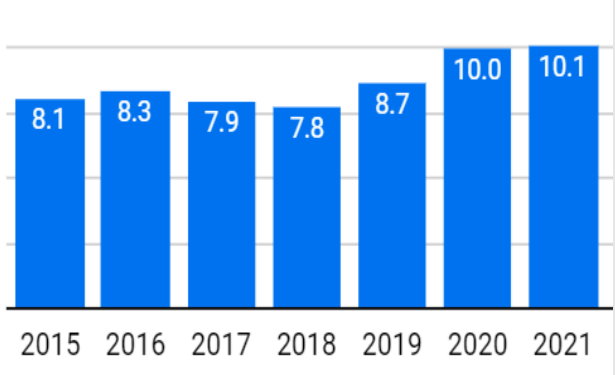|	2015	2016	2017	2018	2019	2020	2021
Outbound travel expenditure	$17.2B	$17.62B	$19.1B	$19.08B	$18.87B	$10.28B	$11.22B
Outbound trips	13.6M	13.9M	15.3M	15.3M	13.4M	6.1M	6.3M

**Average spend
per outbound trip (2019)
1.404 $**

**Outbound travel intensity
1.57 trips
per inhabitant (2019)**

Share of outbound travel, % all trips

2015	2016	2017	2018	2019	2020	2021
67.5%	68.5%	69.3%	69.6%	67.3%	45.9%	45.2%
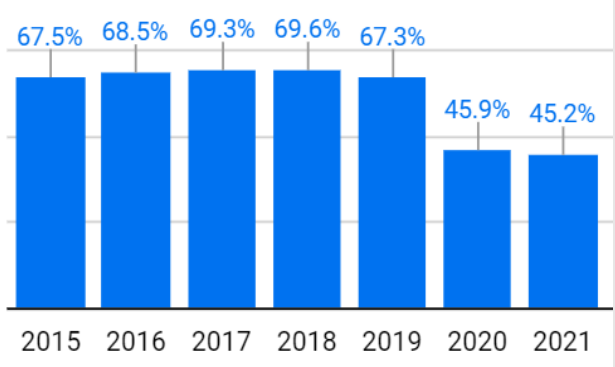
Average length of stay, nights, all outbound trips

2015	2016	2017	2018	2019	2020	2021
8.1	8.3	7.9	7.8	8.7	10.0	10.1

**Share of leisure,
% all outbound trips (2019)
91.8%**

Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation
2022

**Nights,
paid accommodation, 2022**

42.909

+131% (vs. 2021)
+7% (vs. 2019)

**Arrivals,
paid accommodation, 2022**

24.442

+138% (vs. 2021)
+6% (vs. 2019)

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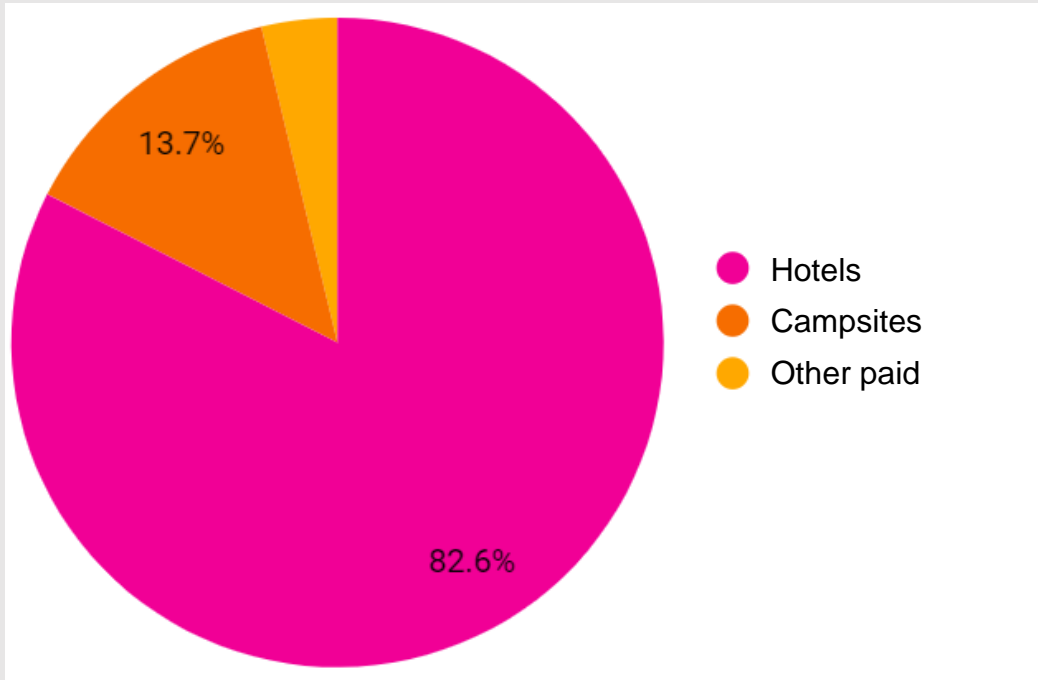paid accommodation, 2022**

**1.76
days**

-0.05 days (vs. 2021)
+0.03 days (vs. 2019)

Nights & arrivals in paid accommodation
Type of accommodation, 2022

Nights,
paid accommodation

- Hotels
- Campsites
- Other paid

13.7%

82.6%
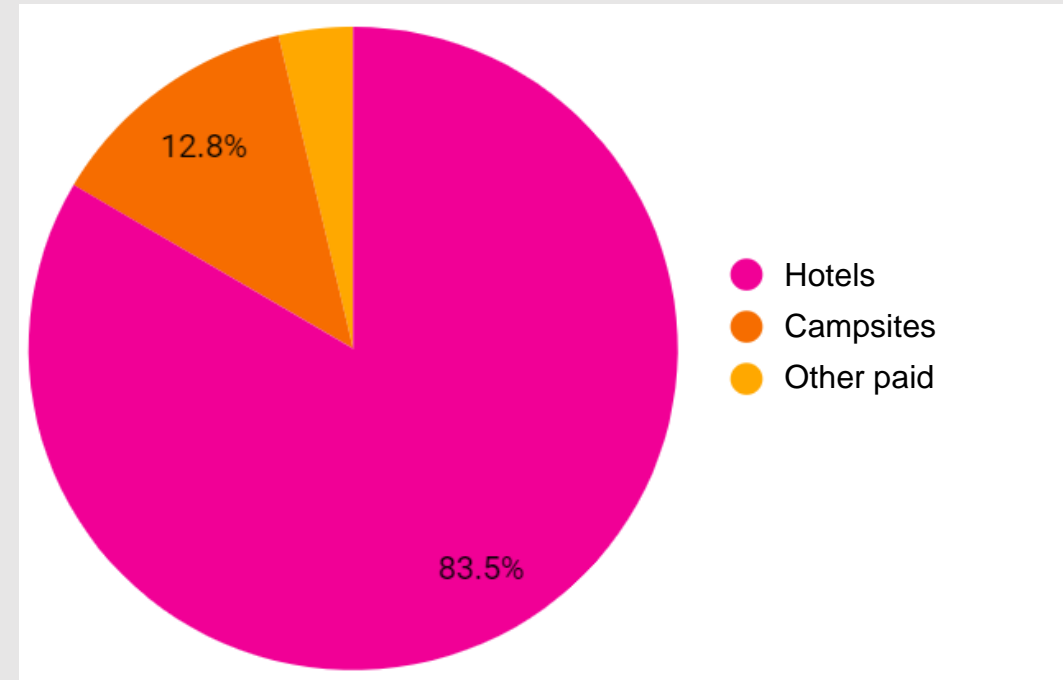
Hotels	35.423	-3% (vs. 2019)
Campsites	5.876	+234% (vs. 2019)
Other paid	1.610	+2% (vs. 2019)

Arrivals,
paid accommodation

- Hotels
- Campsites
- Other paid

12.8%

83.5%

Hotels	20.405	-4% (vs. 2019)
Campsites	3.133	+260% (vs. 2019)
Other paid	904	+3% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation
Regions, 2022

Nights, paid accommodation

- Luxembourg City — 62%
- Guttland — 17.5%
- South — 9.5%
- Eislek — 4.6%
- MPSL
- Moselle

Arrivals, paid accommodation

- Luxembourg City — 64.9%
- Guttland — 16.5%
- South — 8.8%
- Eislek
- MPSL
- Moselle
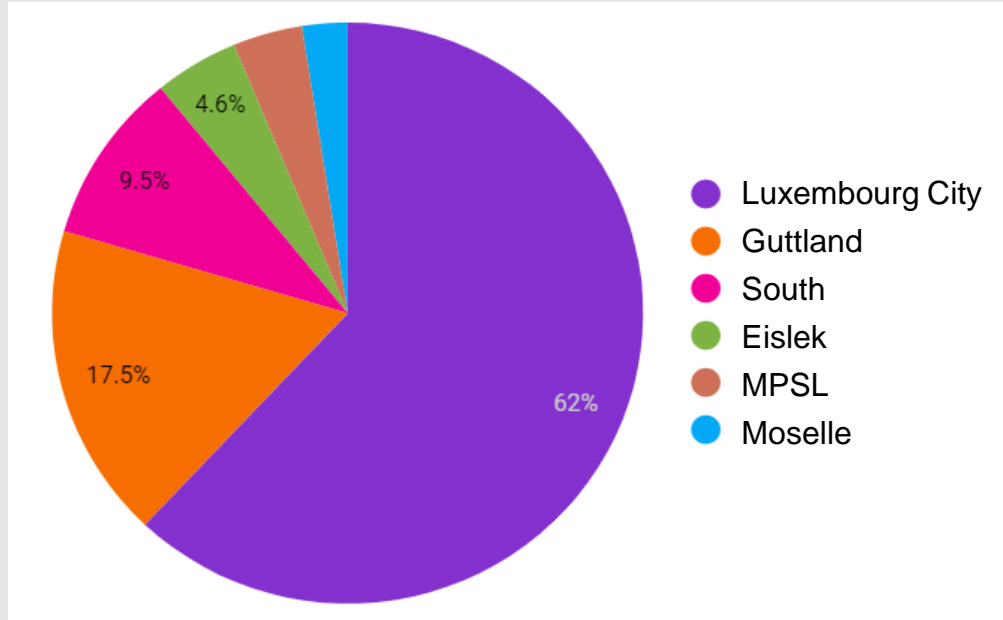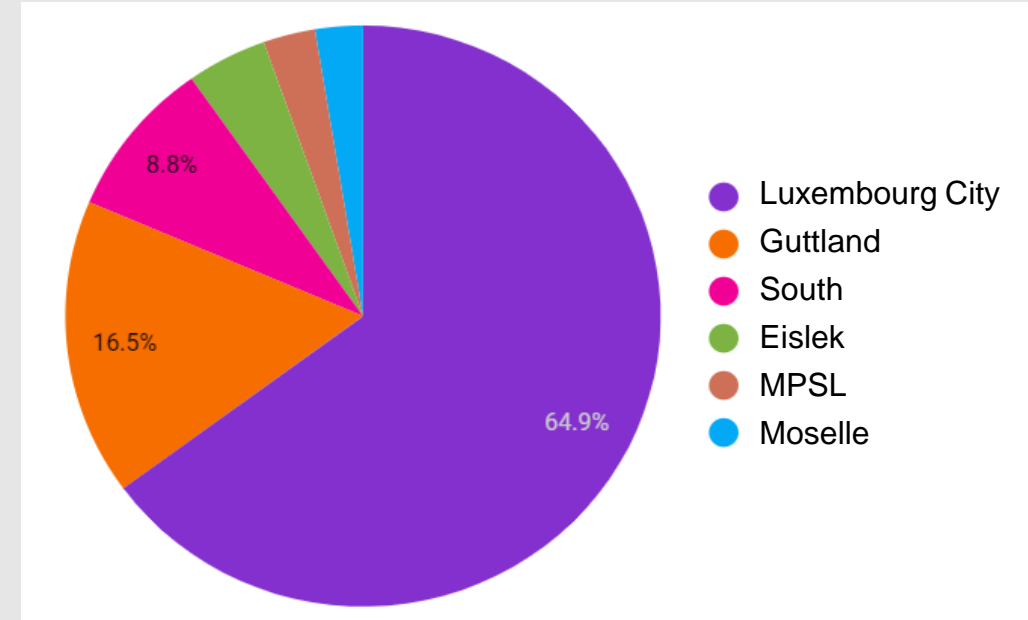
Luxembourg City	26.613	-11% (vs. 2019)
Guttland	7.522	+87% (vs. 2019)
South	4.094	+74% (vs. 2019)
Eislek	1.982	+56% (vs. 2019)
MPSL	1.632	+41% (vs. 2019)
Moselle	1.066	-24% (vs. 2019)

Luxembourg City	15.860	-9% (vs. 2019)
Guttland	4.038	+58% (vs. 2019)
South	2.154	+66% (vs. 2019)
Eislek	1.066	+90% (vs. 2019)
MPSL	691	+60% (vs. 2019)
Moselle	633	-12% (vs. 2019)

Source: Statec

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

2016 = Index 100

2016 = Index 100

Source: Statec
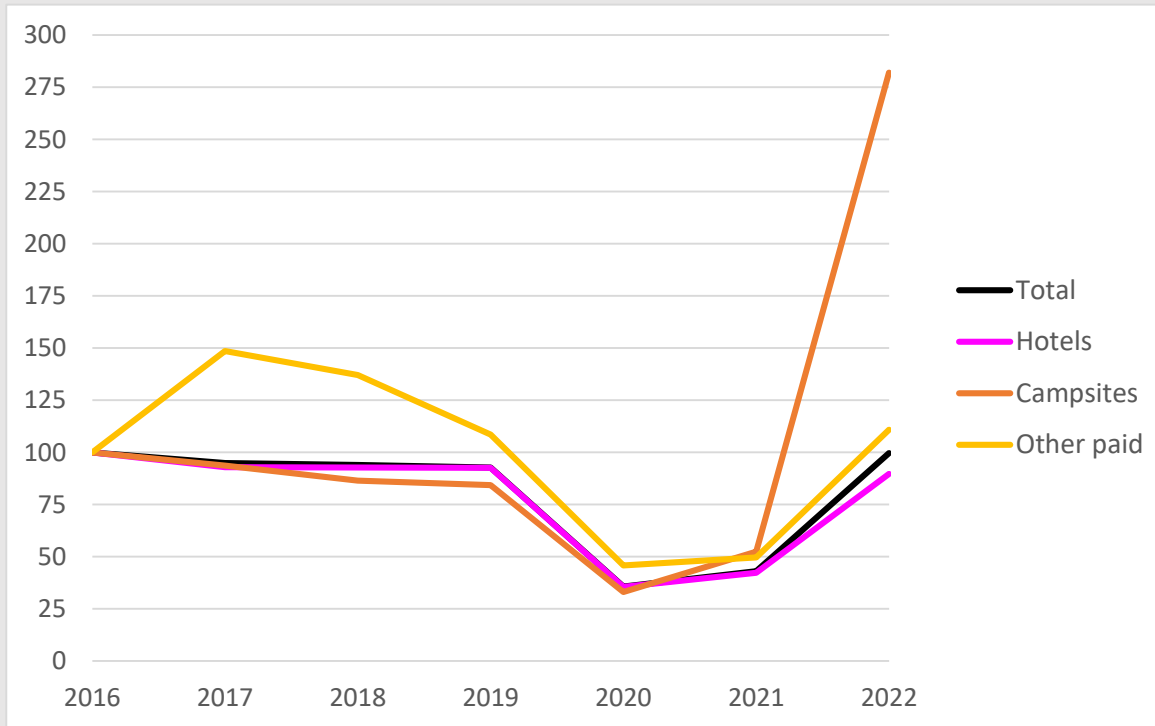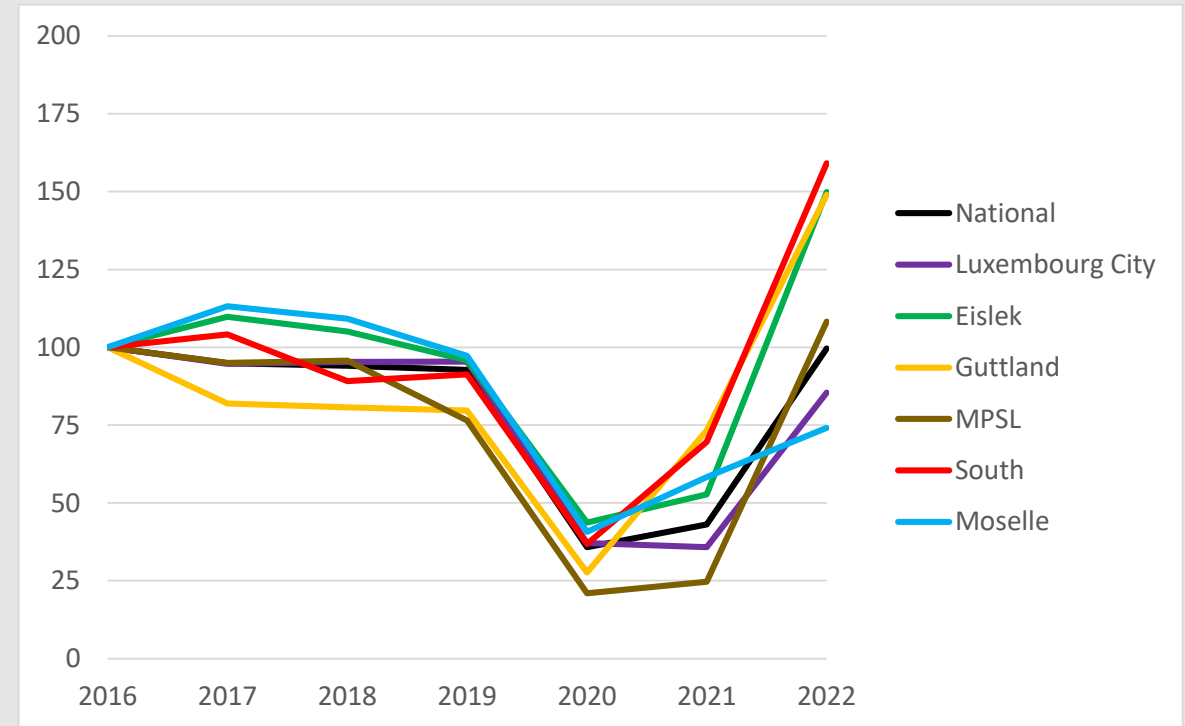
Nights in paid accommodation
Seasonality

Swiss nights, all paid accommodation

Legend: 2016, 2019, 2022

Swiss nights, hotels

Legend: 2016, 2019, 2022

Nights, all paid accommodation, 2022

Legend: Switzerland, All inbound
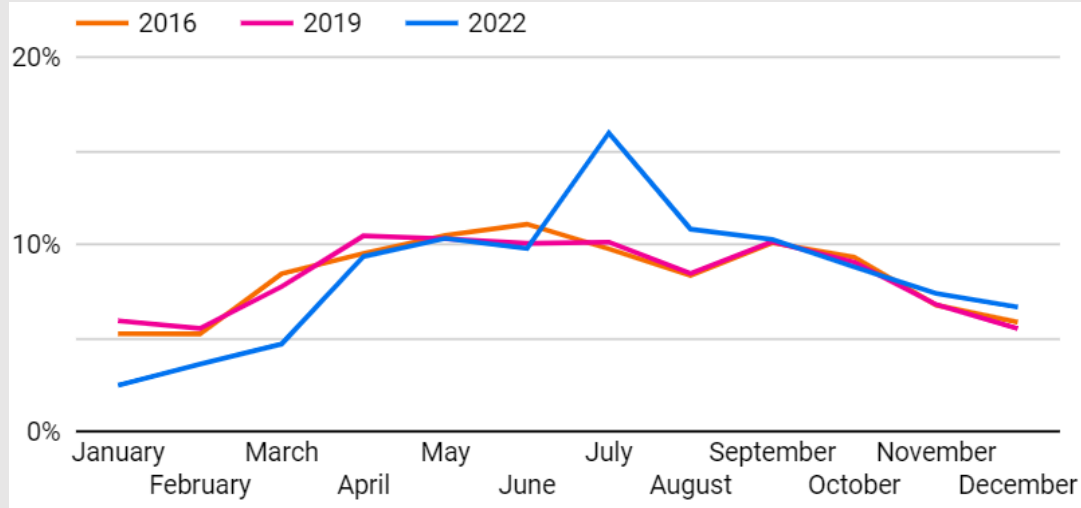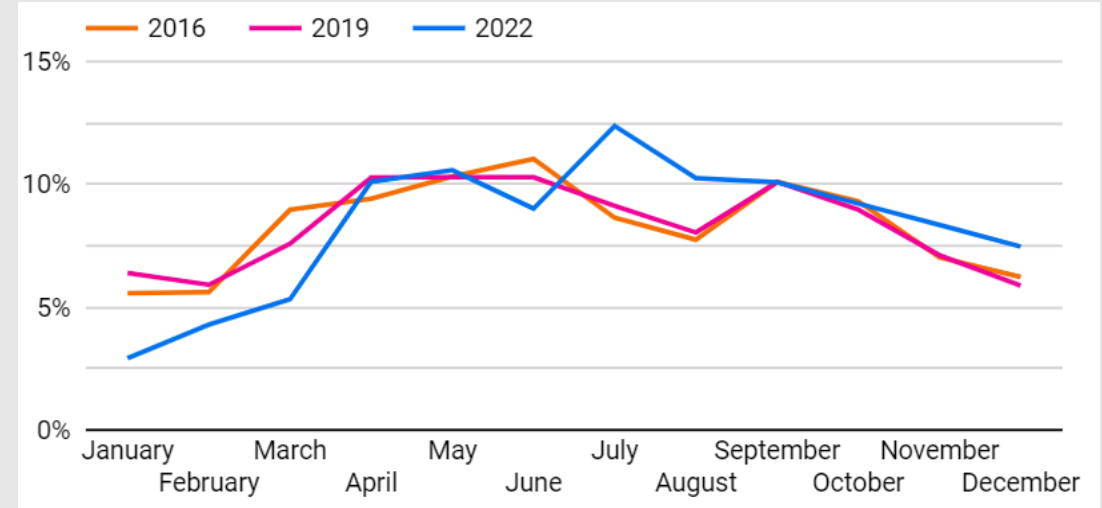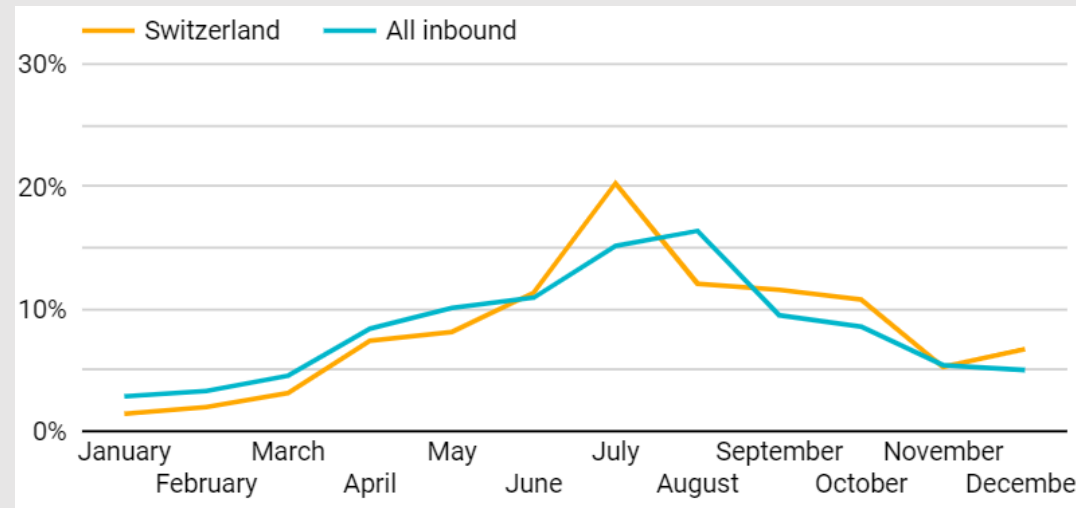
Characteristics of Swiss inbound trips to Luxembourg

Swiss trips to Luxembourg with overnight (all accommodation)
Purpose of visit, 2016-2022

Sources: World Travel Monitor/IPK International.
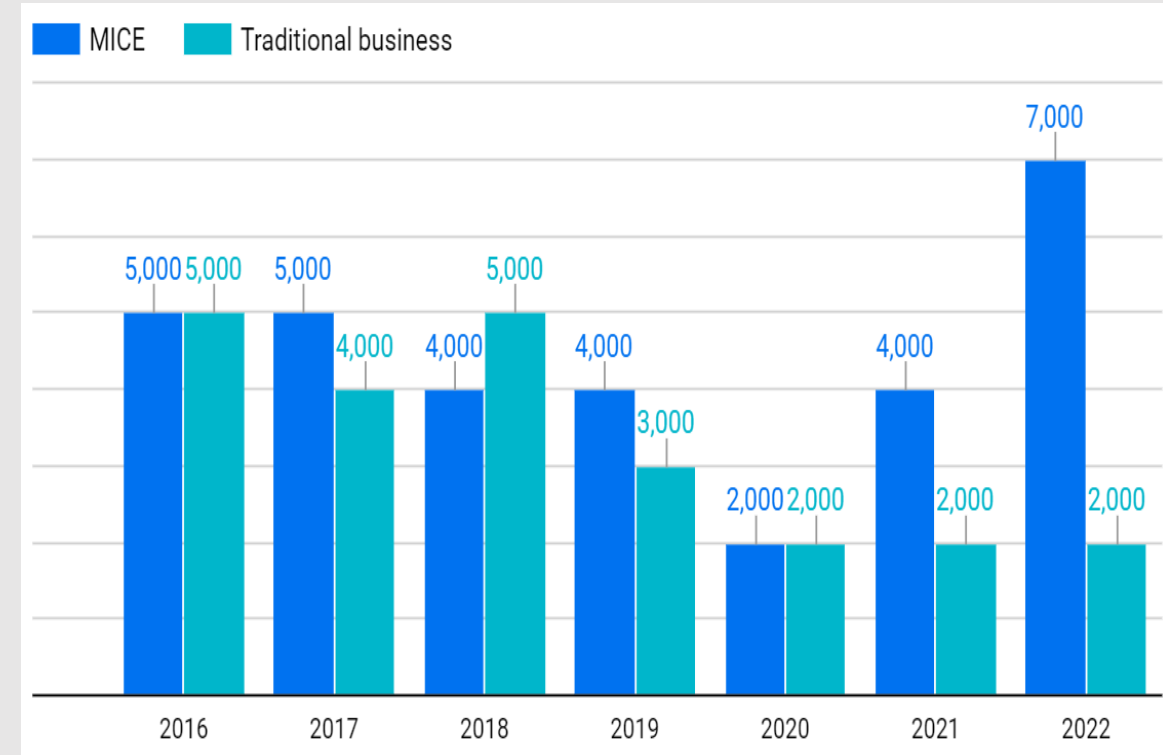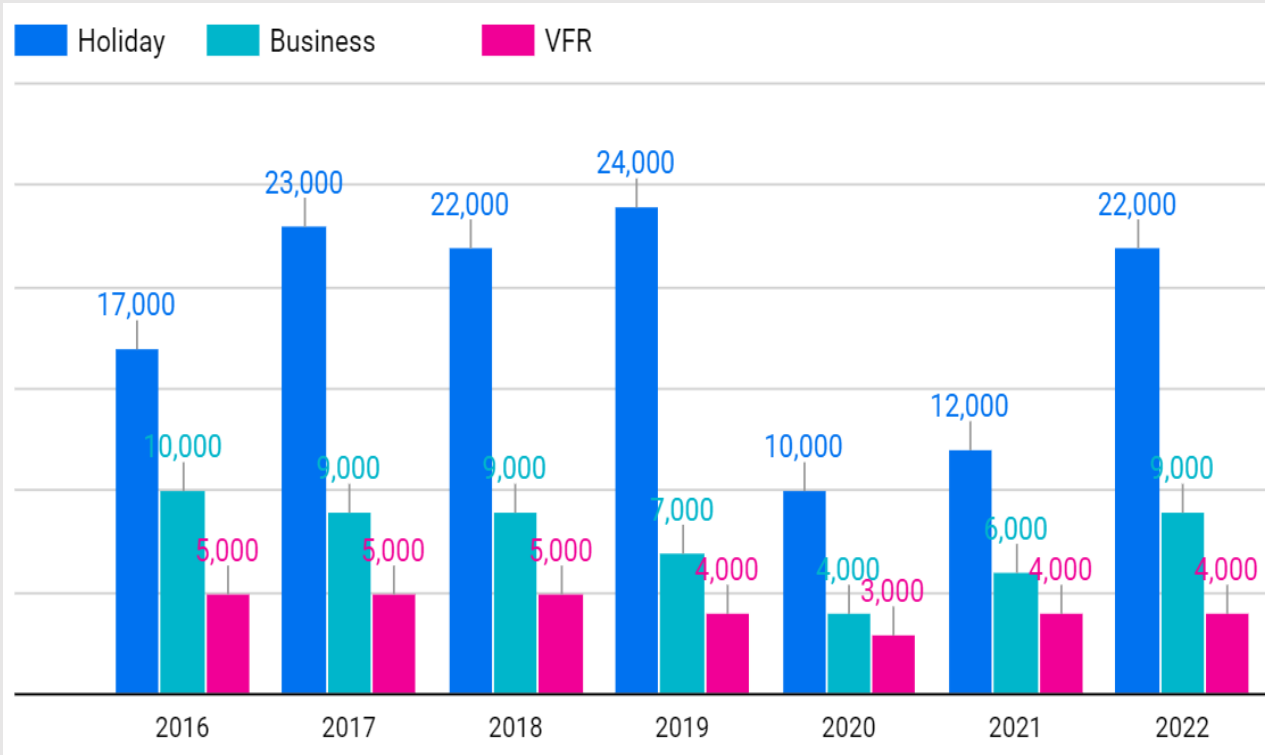
Swiss trips to Luxembourg with overnight (all accommodation)
Purpose of visit, 2016-2022

Swiss trips to Luxembourg, 2016-2022

Legend: Traditional business | MICE | VFR | Holiday

Year	Traditional business	MICE	VFR	Holiday
2016	16%	16%	16%	53%
2017	11%	14%	14%	62%
2018	14%	11%	14%	63%
2019	8%	11%	11%	67%
2020	12%	12%	18%	59%
2021	9%	18%	18%	55%
2022	6%	20%	11%	63%
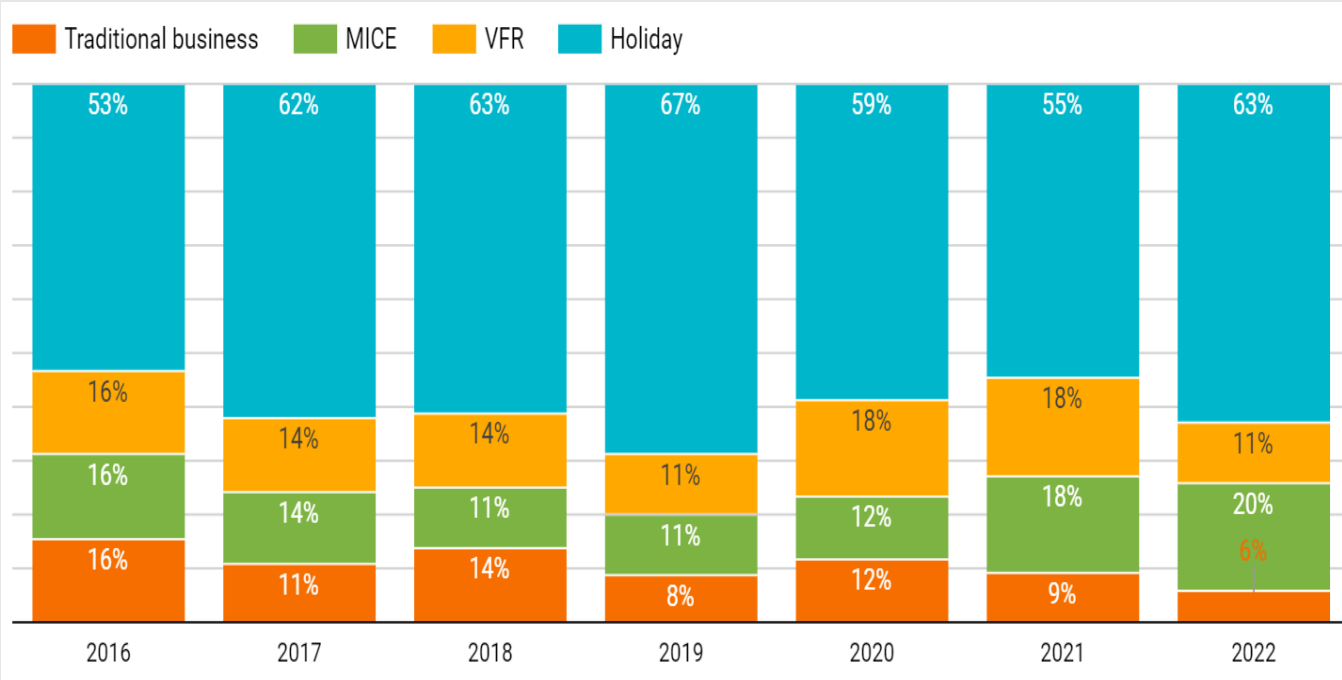
2022

	Switzerland to Luxembourg	Europe to Luxembourg
Holiday	63%	63%
VFR	11%	17%
MICE	20%	12%
Traditional Business	6%	8%

Swiss & European _holiday_ trips to Luxembourg, 2016 = index 100

Legend: Switzerland | Europe
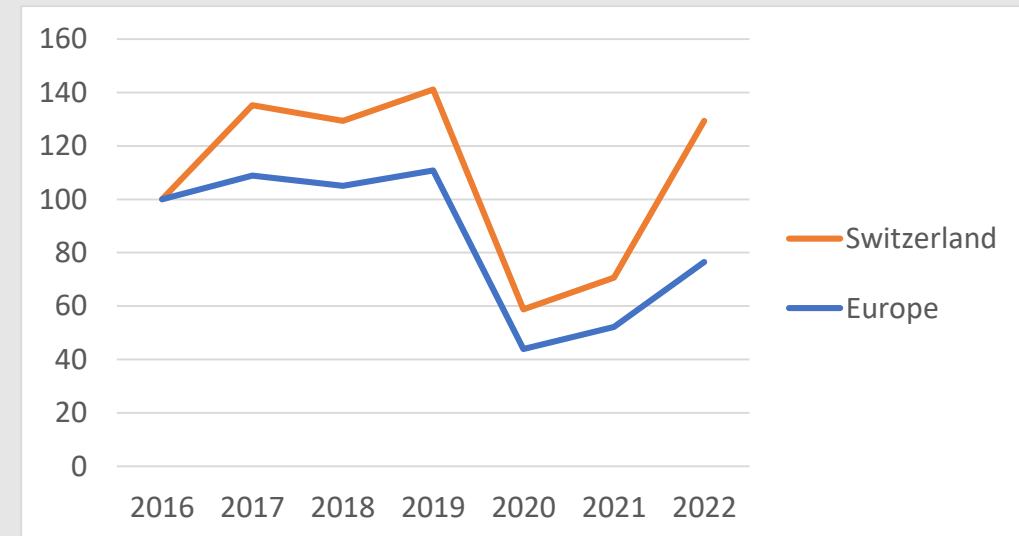
Swiss <u>same-day</u> trips to Luxembourg
2022

Number of German same-day trips to Luxembourg

40.000
(1%
of inbound
same-day trips
to
Luxembourg)

+79% (vs. 2021)

Average length of same-day trips

8,6 h
(All
inbound
7,3h)

Seasonality of same-day trips, % monthly share

Legend: Switzerland, All inbound
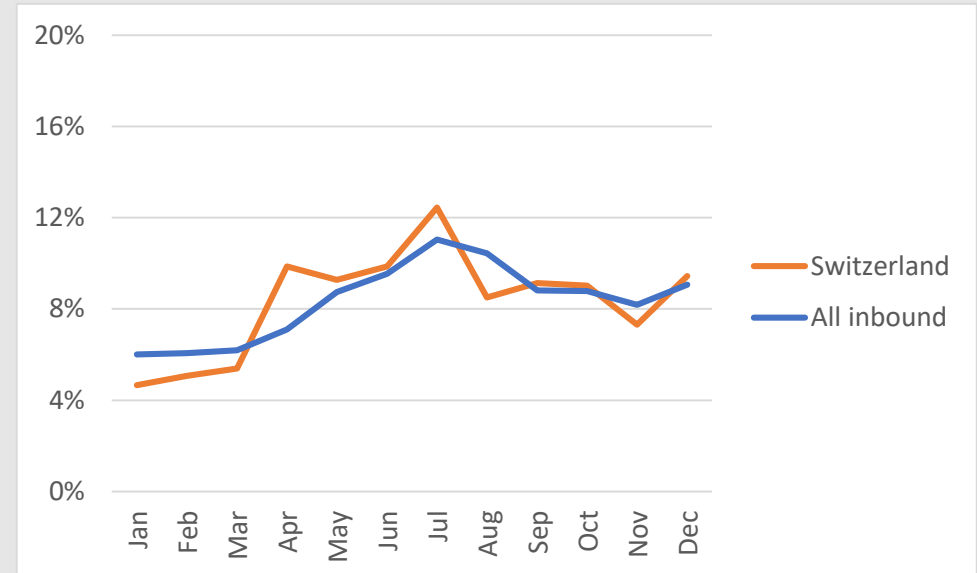
Travel behaviour of Swiss leisure visitors in Luxembourg

Holiday types
Inbound leisure visitors with overnight, 2020-2022

Main holiday types

Holiday type	Switzerland	All inbound
Sightseeing holiday	67%	23%
City break	33%	20%
Nature holiday	0%	7%
Culinary, gastronomy, wine trip	0%	
Sport / active holiday	0%	3%
Family holiday	0%	11%
Fun and party holiday	0%	1%
Wellness, well-being, health holiday	0%	1%
Cultural holidays, study tour	0%	3%
Adventure & discovery holiday	0%	3%
Hiking holiday	0%	13%
Resting & relaxation holiday	0%	14%

Additional holiday types

Holiday type	Switzerland	All inbound
Sightseeing holiday	78%	43%
City break	67%	44%
Family holiday	33%	24%
Cultural holidays, study tour	22%	13%
Resting & relaxation holiday	22%	37%
Culinary, gastronomy, wine trip	11%	6%
Wellness, well-being, health holiday	0%	3%
Fun and party holiday	0%	6%
Sport / active holiday	0%	8%
Adventure & discovery holiday	0%	10%
Nature holiday	0%	26%
Hiking holiday	0%	29%

Key decision criteria for choosing Luxembourg
Inbound leisure visitors with overnight (*), 2020-2022

Legend: **Switzerland** (blue), **All inbound** (grey)

Criteria	Switzerland	All inbound
Visit while on a trip in neighbouring country	33%	12%
New destination easy to access	33%	28%
Little known destination	22%	14%
Curious to discover a new destination	22%	25%
My travel partner decided to go there	22%	9%
Found an affordable offer	11%	4%
Convinced by images/videos/print coverage	11%	10%
Always been fascinated for Luxembourg	11%	5%
Positive previous visiting experience	11%	22%
Recommendation by friends/relatives	11%	14%
Only Grand Duchy in the world	0%	1%
Luxembourg's image and reputation	0%	5%
International/multicultural country	0%	5%
Found interesting experiences/activities	0%	7%

Key travel motivations
Inbound leisure visitors with overnight, 2020-2022

Legend: **Switzerland** (blue) | **All inbound** (grey)

Motivation	Switzerland	All inbound
Having new experiences and living something different	78%	42%
Indulging and spoiling myself	44%	25%
Wanted my destination to be safe	44%	28%
Seeing and experiencing as much as possible	44%	36%
Getting away from daily grind, recharging batteries	44%	44%
Finally having time for myself and my family/friends	33%	28%
Getting to know new people	22%	7%
Immersing myself as deeply as possible in destination	22%	13%
Having fun and enjoying myself	22%	23%
Able to encounter a variety of experiences in small area	22%	20%
Excitement, action and adventure	11%	5%
Enjoying good weather and a pleasant climate	11%	16%
Able to communicate easily at my destination	11%	18%
Travelling as sustainably and ecologically as possible	0%	8%
Retracing old memories ; seeing things again	0%	14%

Type of places and cities visited in Luxembourg

Places visited during leisure overnight stays[1]

Legend: ■ Switzerland ■ All inbound

Place	Switzerland	All inbound
Luxembourg City	100%	81%
Contemporary architecture, urban design	78%	43%
Other towns and villages	78%	73%
Churches, religious sites	56%	60%
Castles	56%	67%
Museums, art galleries, exhibitions	44%	46%
Industrial heritage sites	22%	15%
Concerts, festivals, cultural/traditional events	11%	15%
Wellness, beauty, health institutions	11%	8%
Military history sites (remembrance tourism)	11%	33%
Sports events	0%	3%
Leisure/animal/adventure parks	0%	17%

Top cities visited during Swiss overnight and same-day trips[2] (*), 2022

City	%
Luxembourg City (**)	67.9%
Esch-sur-Alzette	2.1%
Schengen	1.4%
Roeser	1.3%
Steinsel	1.0%
Mersch	0.9%
Schuttrange	0.9%
Remich	0.8%
Sanem	0.8%
Dudelange	0.8%
Bettembourg	0.7%
Differdange	0.7%
Vianden	0.7%
Echternach	0.6%
Junglinster	0.6%
Mondercange	0.6%
Käerjeng	0.6%
Mondorf-les-Bains	0.6%
Clervaux	0.5%
Wormeldange	0.5%

	Luxembourg City (**)	Top 20 municipalities (excl. Lux. City urban area)	Other municipalities
Switzerland	67.9%	16.6%	15.5%
All inbound	49.2%	25.7%	25.1%

Sources: [1] LFT/Ilres Visitor Survey, 2020-2022, [2] 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.
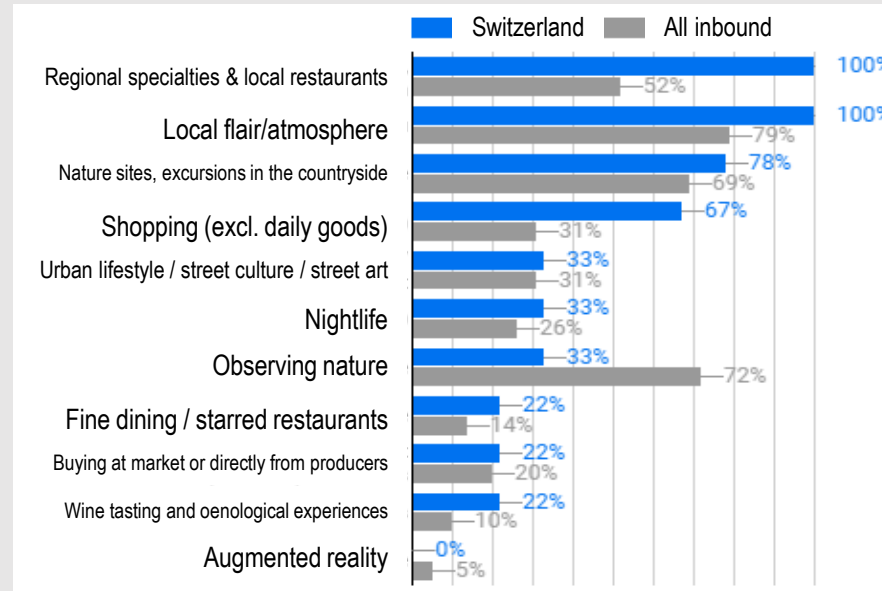(**) Urban area, incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange)
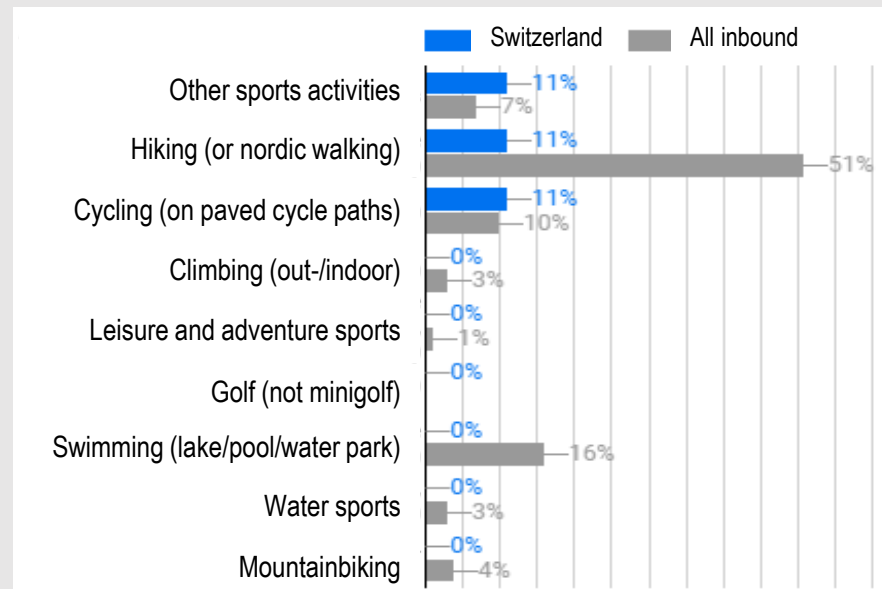
Activities undertaken in Luxembourg
Inbound leisure visitors with overnight, 2020-2022

Non-sporting activities

Legend: Switzerland, All inbound

Activity	Switzerland	All inbound
Regional specialties & local restaurants	100%	52%
Local flair/atmosphere	100%	79%
Nature sites, excursions in the countryside	78%	69%
Shopping (excl. daily goods)	67%	31%
Urban lifestyle / street culture / street art	33%	31%
Nightlife	33%	26%
Observing nature	33%	72%
Fine dining / starred restaurants	22%	14%
Buying at market or directly from producers	22%	20%
Wine tasting and oenological experiences	22%	10%
Augmented reality	0%	5%

Sporting activities

Legend: Switzerland, All inbound

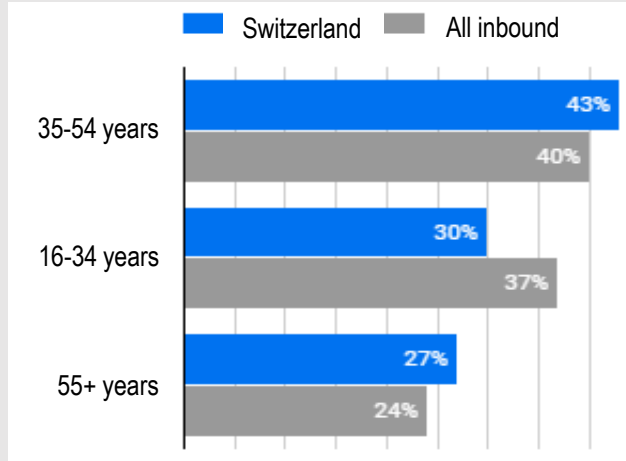| Activity	Switzerland	All inbound
Other sports activities	11%	7%
Hiking (or nordic walking)	11%	51%
Cycling (on paved cycle paths)	11%	10%
Climbing (out-/indoor)	0%	3%
Leisure and adventure sports	0%	1%
Golf (not minigolf)	0%	
Swimming (lake/pool/water park)	0%	16%
Water sports	0%	3%
Mountainbiking	0%	4%

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

Transport, travel party, age, repeat visits and cross-border trips
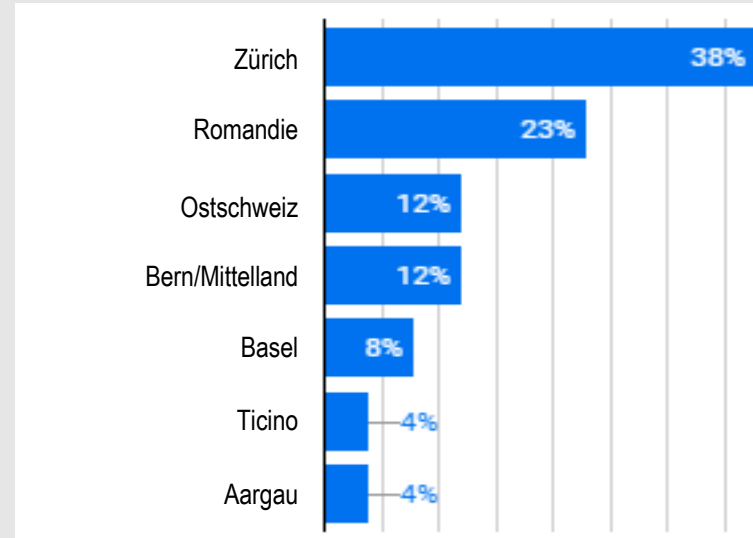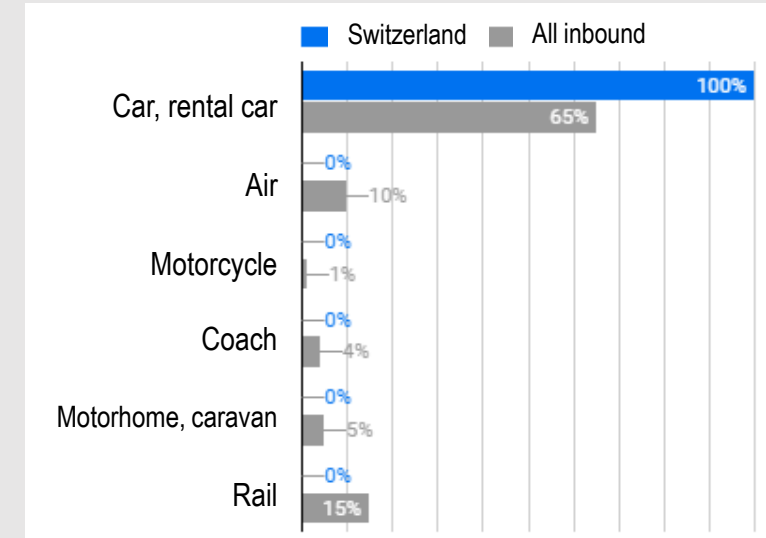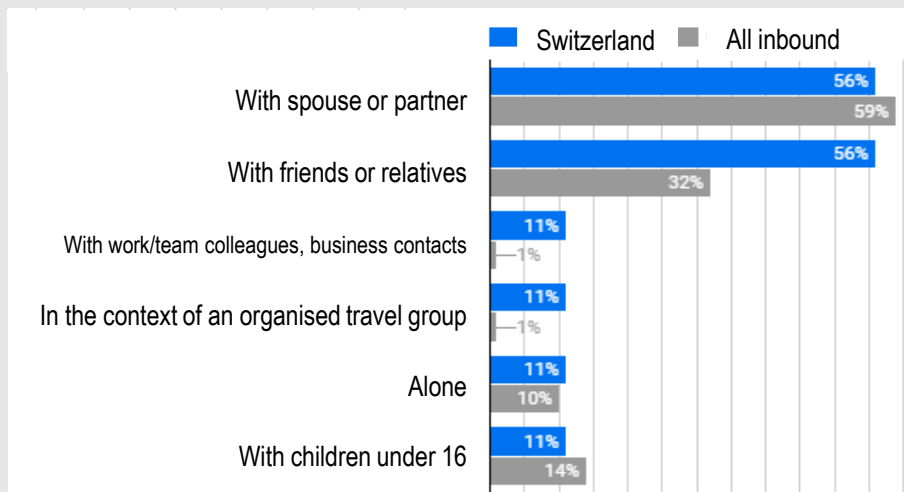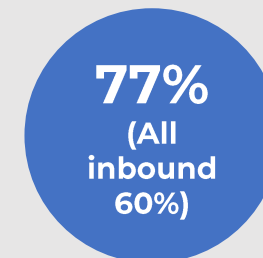## Inbound leisure visitors with overnight, 2020-2022

Age groups

Legend: Switzerland | All inbound

Age group	Switzerland	All inbound
35-54 years	43%	40%
16-34 years	30%	37%
55+ years	27%	24%

Region of origin

Region	Switzerland
Zürich	38%
Romandie	23%
Ostschweiz	12%
Bern/Mittelland	12%
Basel	8%
Ticino	4%
Aargau	4%

Mode of transport to access Luxembourg

Legend: Switzerland | All inbound

Mode	Switzerland	All inbound
Car, rental car	100%	65%
Air	0%	10%
Motorcycle	0%	1%
Coach	0%	4%
Motorhome, caravan	0%	5%
Rail	0%	15%

Travel party

Legend: Switzerland | All inbound

Travel party	Switzerland	All inbound
With spouse or partner	56%	59%
With friends or relatives	56%	32%
With work/team colleagues, business contacts	11%	1%
In the context of an organised travel group	11%	1%
Alone	11%	10%
With children under 16	11%	14%

First-time visitors

77%
(All inbound 60%)

Visitors spending nights in Luxembourg and abroad during same trip

44%
(All inbound 37%)
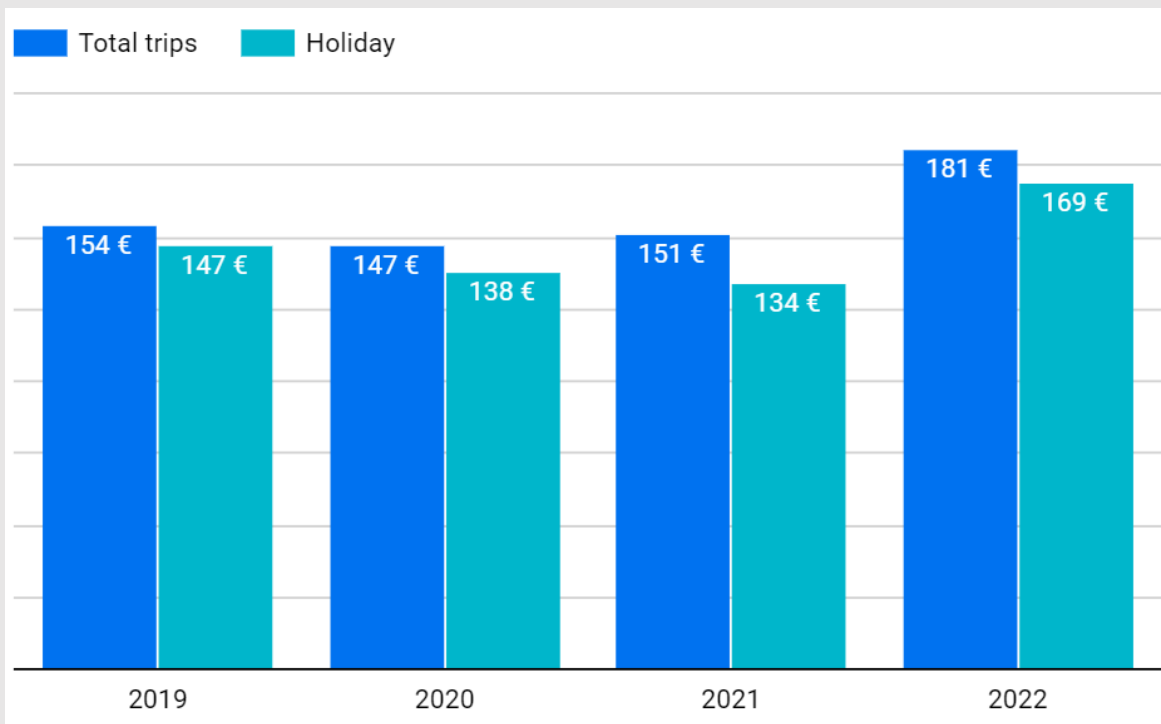
Source: LFT/Ilres Visitor Survey, 2020-2022.
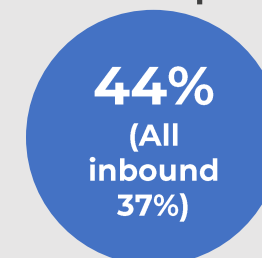
Expenditure
Inbound trips to Luxembourg with overnight (all accommodation)

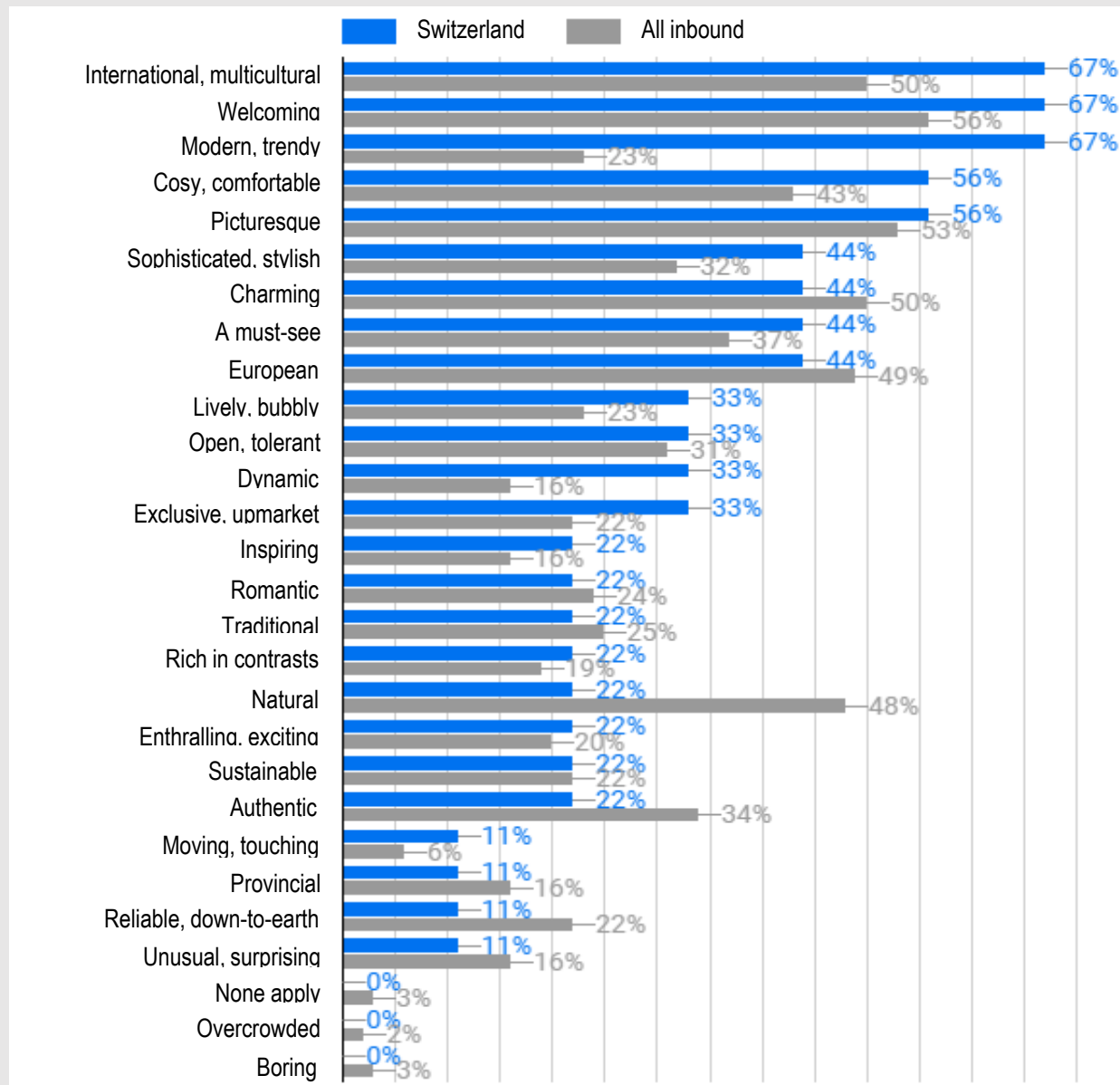**Swiss trips to Luxembourg :**
average spend per pers. per day

■ Total trips ■ Holiday

	2019	2020	2021	2022
Total trips	154 €	147 €	151 €	181 €
Holiday	147 €	138 €	134 €	169 €

2022

	Switzerland to Luxembourg	Europe to Luxembourg
Spend/day/pers. on **all** trips	181 €	124 €
Spend/day/pers. on **holiday** trips	169 €	118 €

Image perception of Luxembourg
Leisure overnight visitors

Legend: **Switzerland** (blue), **All inbound** (grey)

Attribute	Switzerland	All inbound
International, multicultural	67%	50%
Welcoming	67%	56%
Modern, trendy	67%	23%
Cosy, comfortable	56%	43%
Picturesque	56%	53%
Sophisticated, stylish	44%	32%
Charming	44%	50%
A must-see	44%	37%
European	44%	49%
Lively, bubbly	33%	23%
Open, tolerant	33%	31%
Dynamic	33%	16%
Exclusive, upmarket	33%	22%
Inspiring	22%	16%
Romantic	22%	24%
Traditional	22%	25%
Rich in contrasts	22%	19%
Natural	22%	48%
Enthralling, exciting	22%	20%
Sustainable	22%	22%
Authentic	22%	34%
Moving, touching	11%	6%
Provincial	11%	16%
Reliable, down-to-earth	11%	22%
Unusual, surprising	11%	16%
None apply	0%	3%
Overcrowded	0%	2%
Boring	0%	3%

Visitor satisfaction and recommendation
Inbound leisure visitors, 2020-2022

Switzerland

- Strongly agree
- Tend to agree
- Tend to disagree
- Not sure/Do not know
- Strongly disagree

	Strongly agree	Tend to agree
Luxembourg excited me as a travel destination	78%	22%
Would recommend Luxembourg as a destination	89%	11%
Luxembourg exceeded my expectations	89%	11%
Can picture myself coming back to visit Luxembourg	67%	33%
Luxembourg will stay in my memory for a long time	89%	11%

All inbound

- Strongly agree
- Tend to agree
- Tend to disagree
- Not sure/Do not know
- Strongly disagree

	Strongly agree	Tend to agree	Tend to disagree
Luxembourg excited me as a travel destination	64%	33%	
Would recommend Luxembourg as a destination	63%	34%	
Luxembourg exceeded my expectations	42%	47%	8%
Can picture myself coming back to visit Luxembourg	59%	31%	
Luxembourg will stay in my memory for a long time	64%	35%	

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

Target segments,
Brand & Growth Potential

Brand Funnel 2021-2022
Assessing Luxembourg's brand strength as a destination

	🇨🇭	🇪🇺
Unprompted awareness	**0.6%**	1.5%
Prompted awareness	**69%**	80%
Sympathy	**43%**	49%
Willingness to visit	**24%**	25%
Previously visited	**19%**	20%
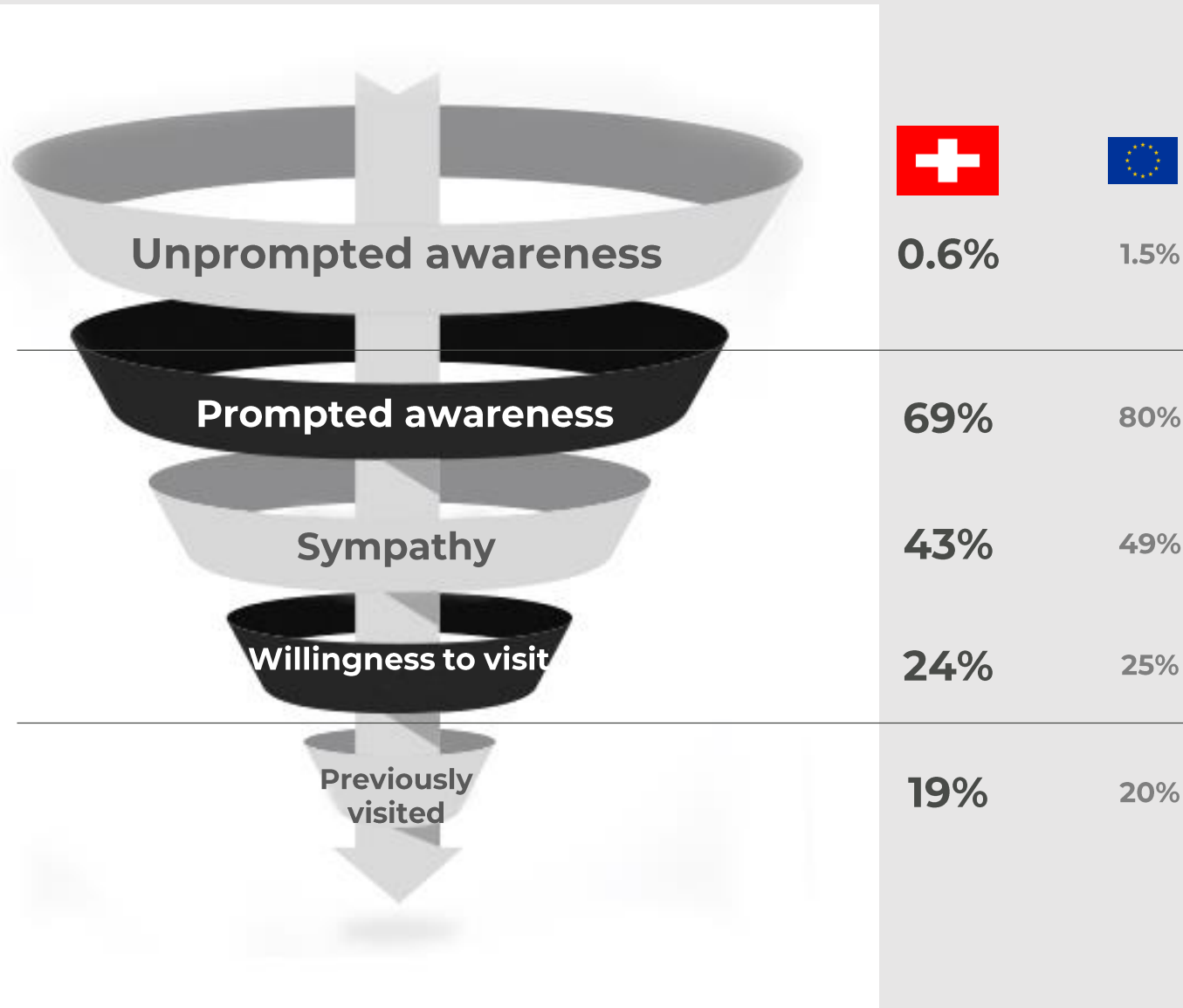
Total future visitor potential from Switzerland (*)
1.6 million

Highest future travel intent from Switzerland (**)
1. Explorers
2. Perfection Seekers
3. Nature-Loving Actives

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

Legend:
- ■ Willingness to visit, short holiday trip (next 3 years)
- ■ Visits in the past

Region	Willingness to visit	Visits in the past
North West	27%	19%
Central	34%	19%
Zurich	30%	19%
East & Ticino	27%	19%
Geneva	30%	19%
Mittelland	27%	20%
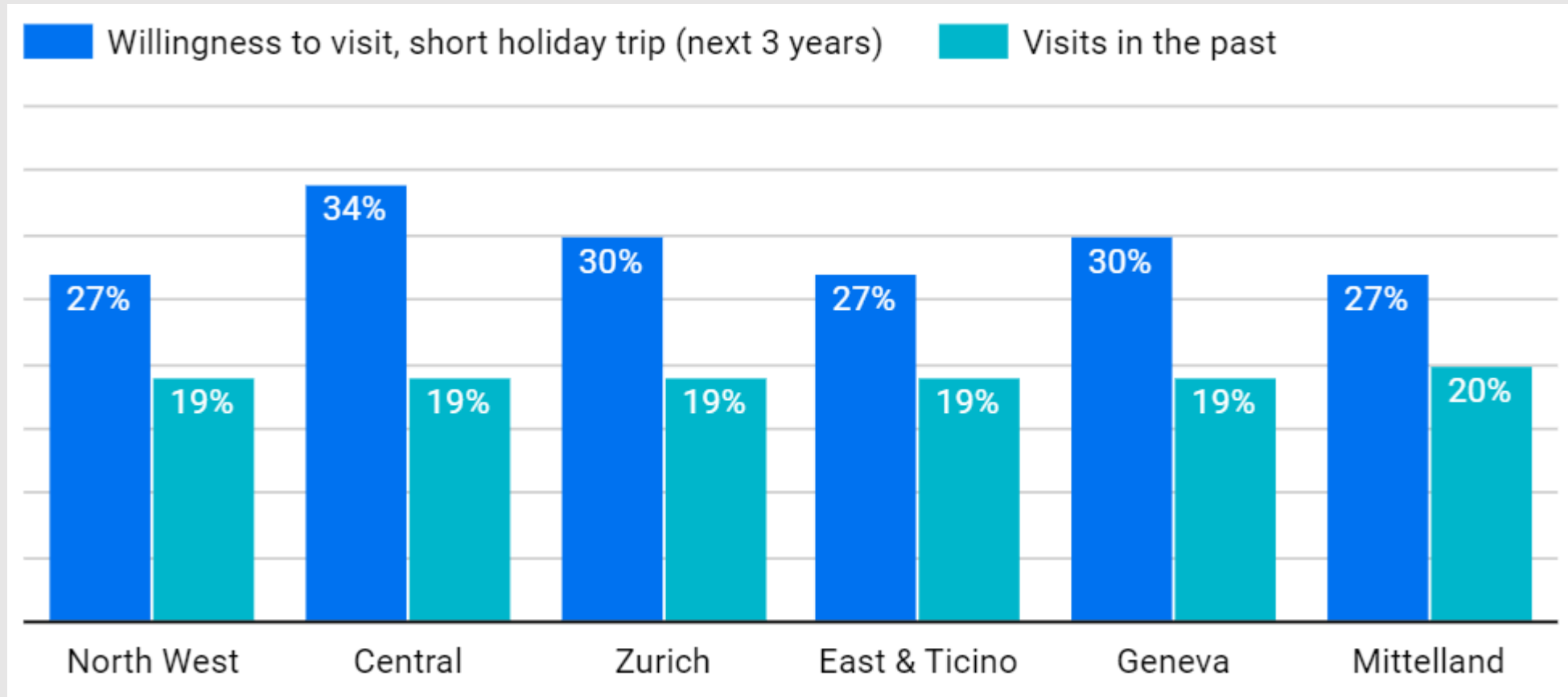
General theme interest (*)

Theme	EU Rank	CH Rank	CH % interested
Resting/Relaxation	1	1	75%
City	4	2	71%
Culinary	2	3	70%
Nature	3	4	63%
Wellness	13	5	51%
Culture	6	6	51%
Castles	5	7	50%
Hiking	8	8	48%
Shopping	10	9	47%
Nightlife (**)	12	10	46%
History/Unesco	7	11	43%
Events	14	12	42%
Sustainability	9	13	41%
Family	11	14	38%
Active-sports	18	15	37%
Wine	16	16	35%
Countryside	15	17	34%
Luxury	17	18	32%
Industrial heritage	19	19	32%
Cycling	21	20	29%
Camping	20	21	29%
MTB	22	22	24%
Voluntary work	24	23	21%
Motorcycling	23	24	13%

(*) 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: Destination Brand/Inspektour.

Luxembourg's Theme Competence (*)

Theme	🇪🇺 Rank	🇨🇭 Rank	🇨🇭 % agreeing
City	1	1	41%
Culture	4	2	34%
Shopping	5	3	33%
Culinary	6	4	32%
Resting/Relaxation	2	5	32%
Castles	3	6	31%
Nightlife (***)	11	7	29%
Wellness	9	8	28%
Nature	7	9	27%
Active-sports	18	10	24%
History/Unesco	8	11	24%
Sustainability	12	12	23%
Cycling	13	13	22%
Camping	15	14	22%
Industrial Heritage	19	15	22%
Countryside	17	16	21%
MTB	20	17	20%
Wine	16	18	20%
Hiking	10	19	18%
Family	14	20	17%

Growth potential for themes (**)

- Nature
- Hiking
- Culinary & Wine
- 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
Open-minded, tolerant	3	**1**	31%
Authentic	1	**2**	28%
Attractive, appealing	4	**3**	28%
Welcoming, hospitable	2	**4**	28%
Service-oriented	7	**5**	24%
Lot of variety, diversified	6	**6**	24%
Not crowded, insider tip	8	**7**	24%
Surprising	5	**8**	24%
Lively, hip	9	**9**	23%
Sustainable	10	**10**	18%

(*) 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.

LFT strategic market focus
Market priorisation

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

Theme & segment focus

Theme	Priority	Marketing	Segments
City	1	Activating	EXP, (PS)
Culinary	2	Image & Activating	EXP
Culture	2	Activating	EXP, PS
Industrial Heritage	3	Activating	PS, (EXP)
Cycling	3	Image	EXP, (PS)
Wine	2	Image	EXP

Brand Value focus

Theme	Priority	Segments
Lot of variety	1	EXP (PS)
Not crowded/insider tip	2	
Sustainable	2	

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