



Luxembourg for Tourism
Market profile
SWITZERLAND
2023



Economic indicators & General Travel Demand

Economic indicators - General travel demand

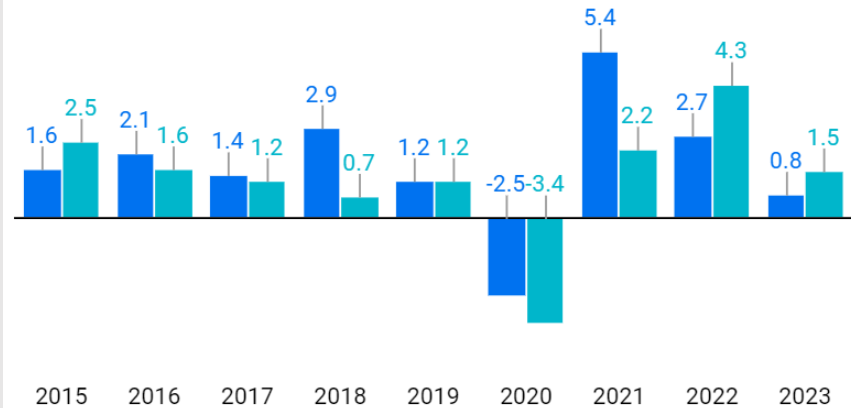


Economy & population

GDP (\$) per capita: **100,413**
 Unemployment (%): **2.0**
 Population (mn): **8.8**
 Inflation (%): **2.1**

GDP and Consumer spending, % annual change

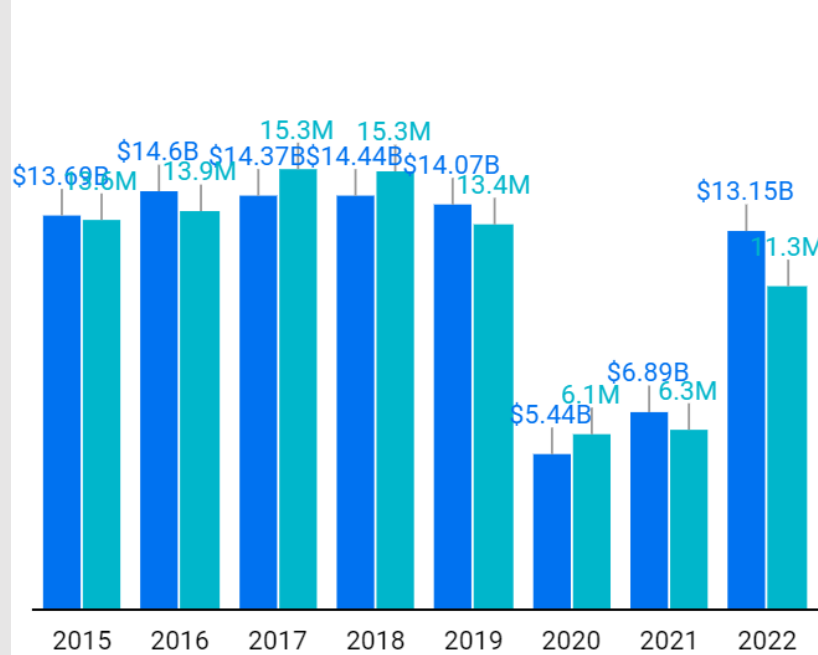
GDP change (blue bars) Consumer spend (teal bars)



Share of short trips (1-3 nights),
 % all outbound trips (2022)
27.1%

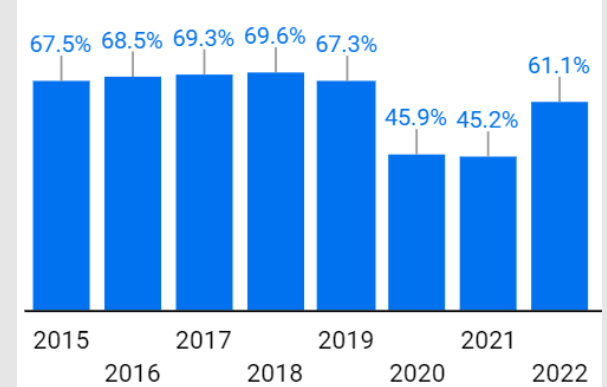
Outbound trips and travel expenditure

Outbound travel expenditure (blue bars) Outbound trips (teal bars)

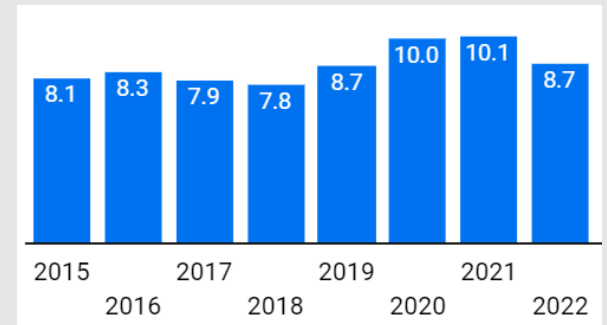


Average spend
 per outbound trip (2019)
1.046 \$

Outbound travel intensity
1.57 trips
 per inhabitant (2019)



Average length of stay, nights, all outbound trips



Share of leisure,
 % all outbound trips (2022)
96.4%

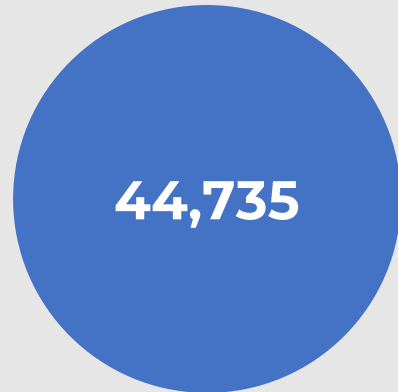


Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2023

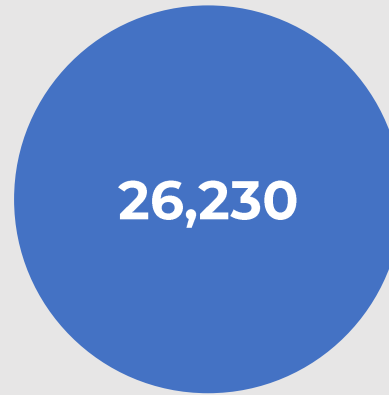


**Nights,
paid accommodation, 2023**



-2% (vs. 2022)
+19% (vs. 2019)

**Arrivals,
paid accommodation, 2023**



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

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



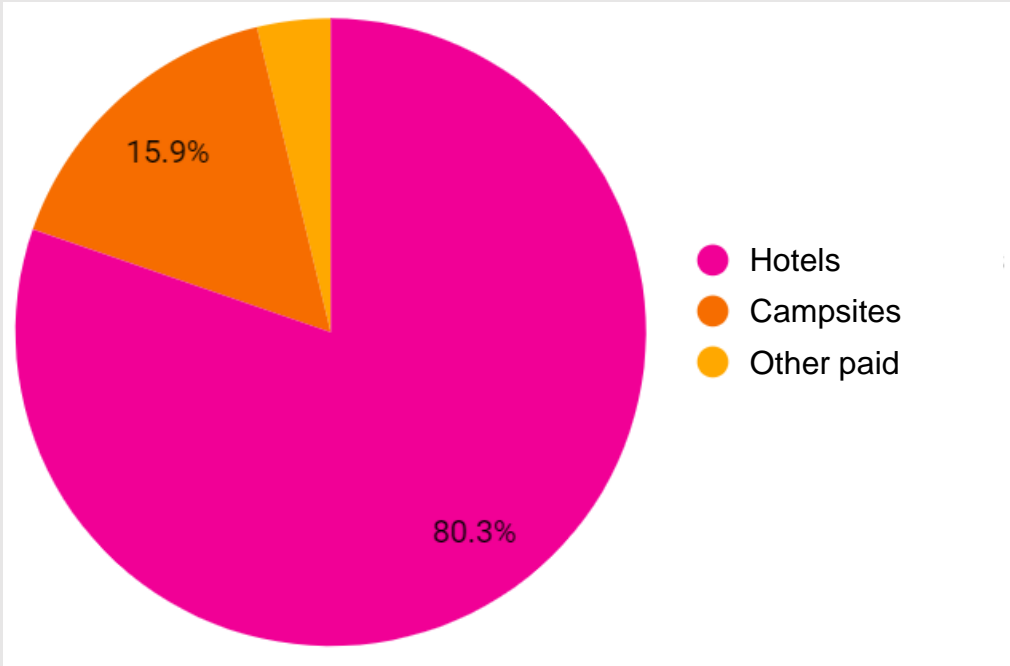
-0.08 days (vs. 2022)
-0.08 days (vs. 2019)

Nights & arrivals in paid accommodation

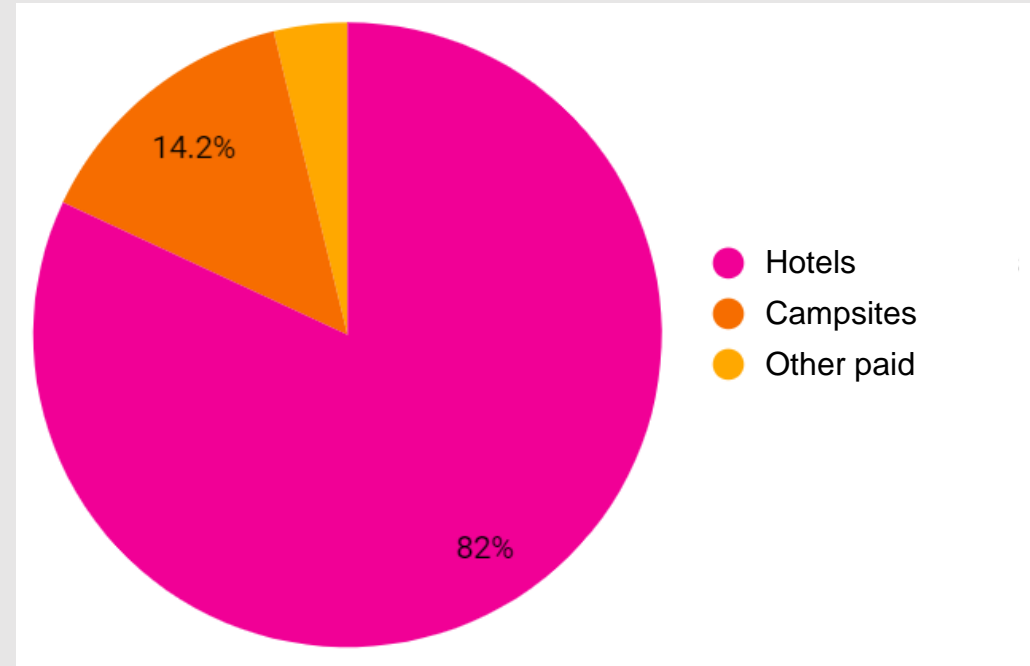
Type of accommodation, 2023



Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



Hotels	35.933	-4% (vs. 2022) +15% (vs. 2019)
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Campsites	7.117	+11% (vs. 2022) +79% (vs. 2019)
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Other paid accomm.	1.685	+5% (vs. 2022) -30% (vs. 2019)
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Hotels	21.502	+1% (vs. 2022) +21% (vs. 2019)
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Campsites	3.736	+16% (vs. 2022) +68% (vs. 2019)
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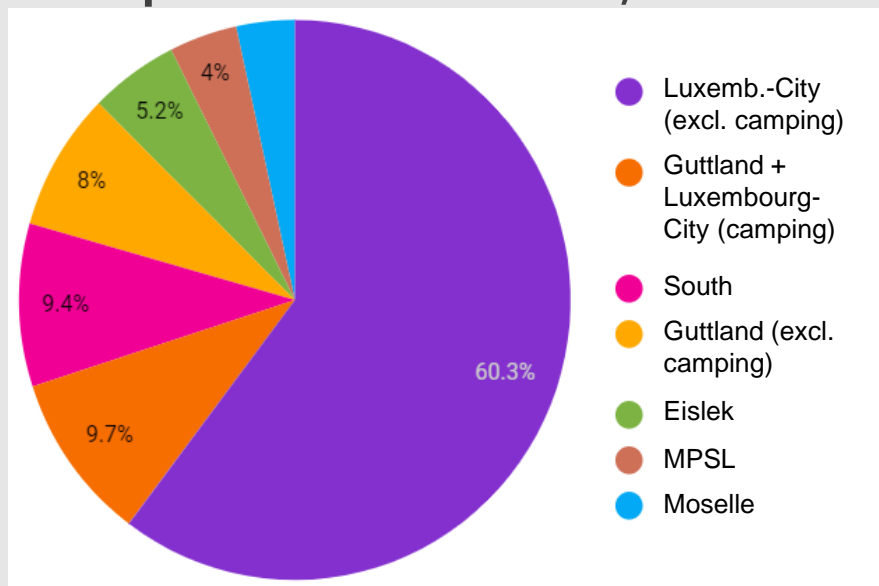
Other paid accomm.	992	+11% (vs. 2022) -1% (vs. 2019)
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Nights & arrivals in paid accommodation

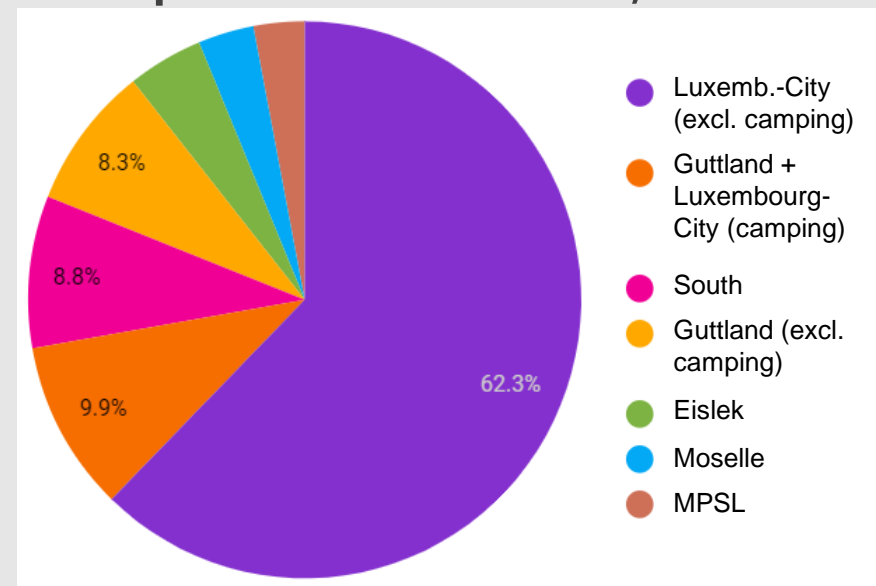
Regions, 2023



Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



Lux.-City (excl. camping)	26.975	+4% (vs. 2022) +20% (vs. 2019)
Guttland/Lux.-City (camping)	4.341	+21% (vs. 2022) +116% (vs. 2019)
South	4.207	-1% (vs. 2022) +18% (vs. 2019)
Guttland (excl. camping)	3.571	-44% (vs. 2022) -3% (vs. 2019)
Eislek	2.325	+3% (vs. 2022) -6% (vs. 2019)
MPSL	1.783	-7% (vs. 2022) -5% (vs. 2019)
Moselle	1.533	+41% (vs. 2022) -6% (vs. 2019)

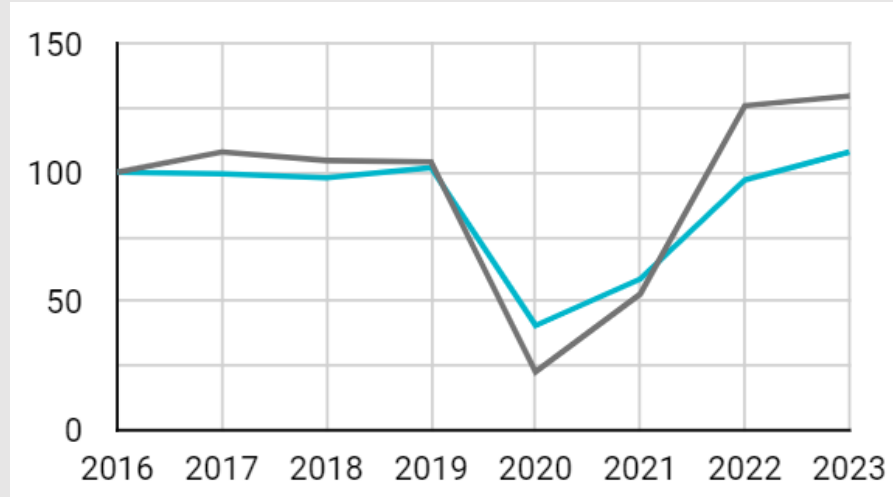
Lux.-City (excl. camping)	16.343	+7% (vs. 2022) +28% (vs. 2019)
Guttland/Lux.-City (camping)	2.597	+21% (vs. 2022) +96% (vs. 2019)
South	2.315	+3% (vs. 2022) +12% (vs. 2019)
Guttland (excl. camping)	2.179	-35% (vs. 2022) +4% (vs. 2019)
Eislek	1.158	+8% (vs. 2022) -0% (vs. 2019)
Moselle	856	+33% (vs. 2022) -0% (vs. 2019)
MPSL	782	+4% (vs. 2022) +2% (vs. 2019)

Arrivals in paid accommodation

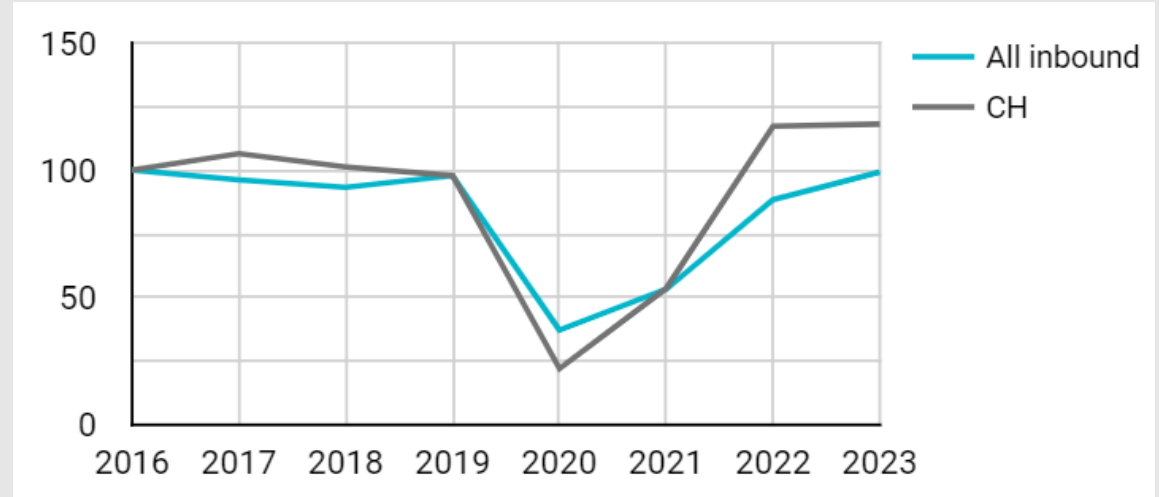
Trends 2016-2023



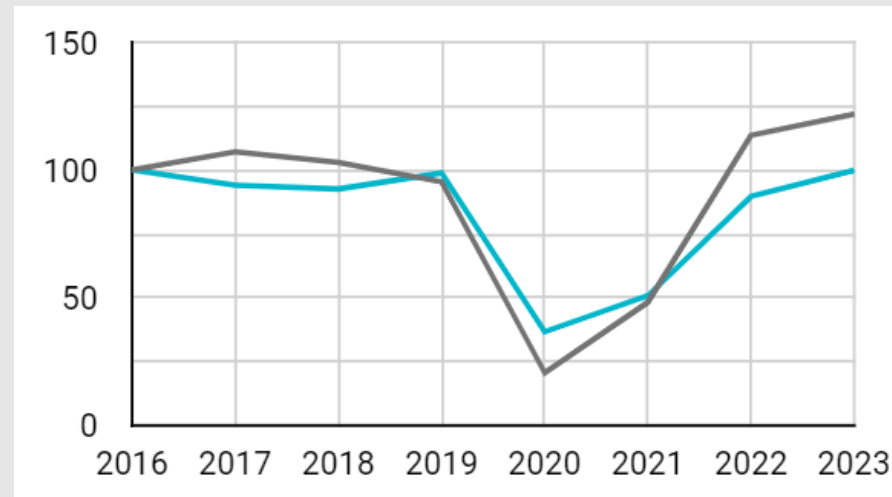
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



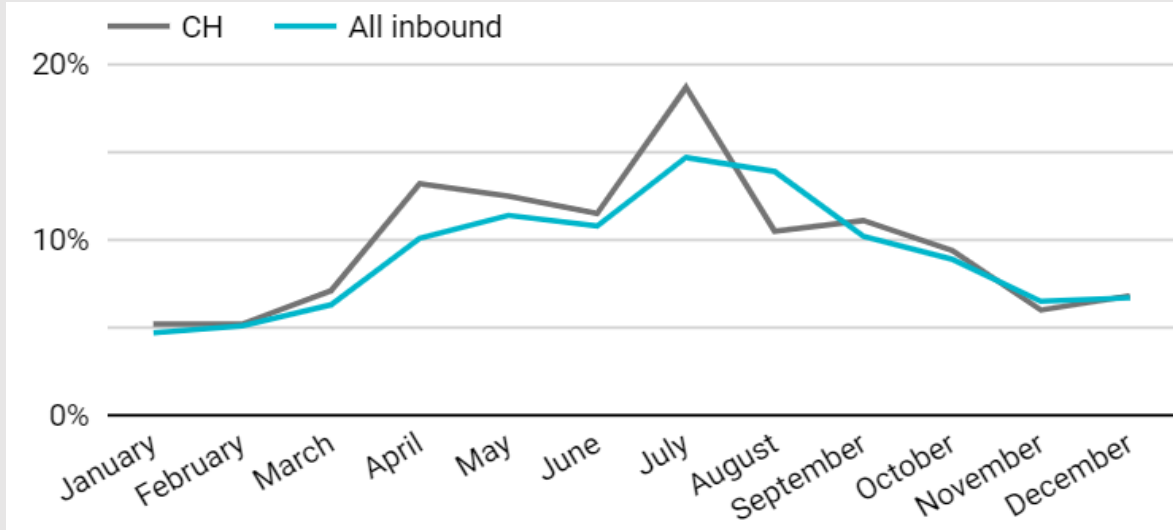
(*), excluding camping.
Source: Statec

Arrivals in paid accommodation

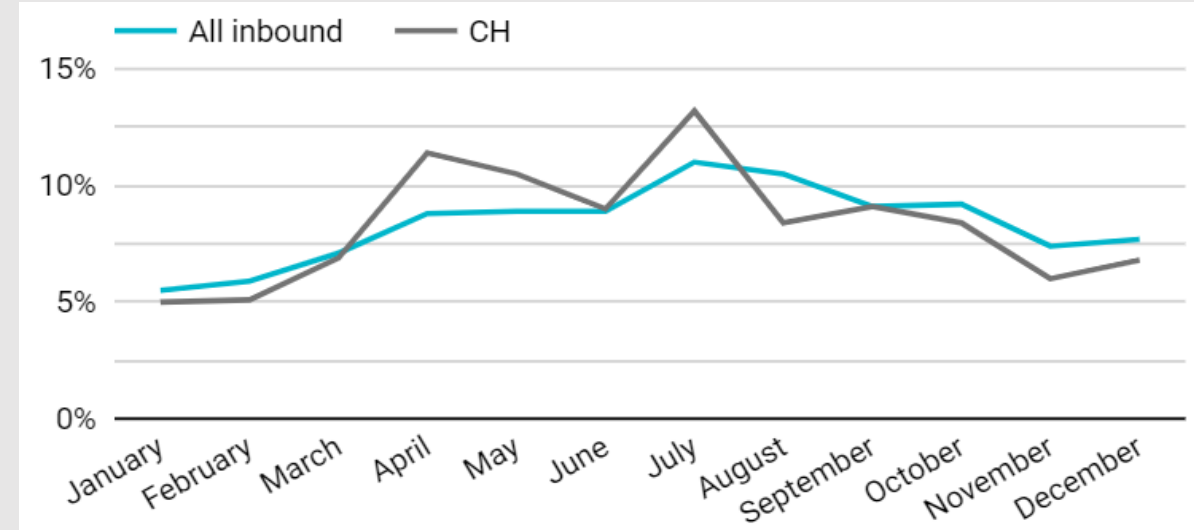
Seasonality



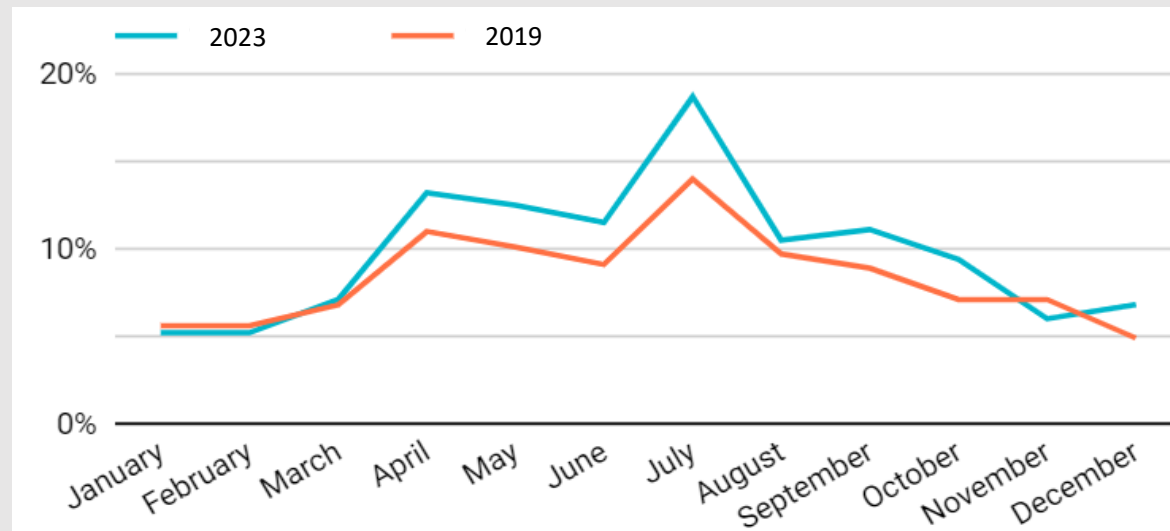
All paid accommodation, 2023



Hotels, 2023



All paid accommodation, arrivals from Switzerland



Short-term rentals

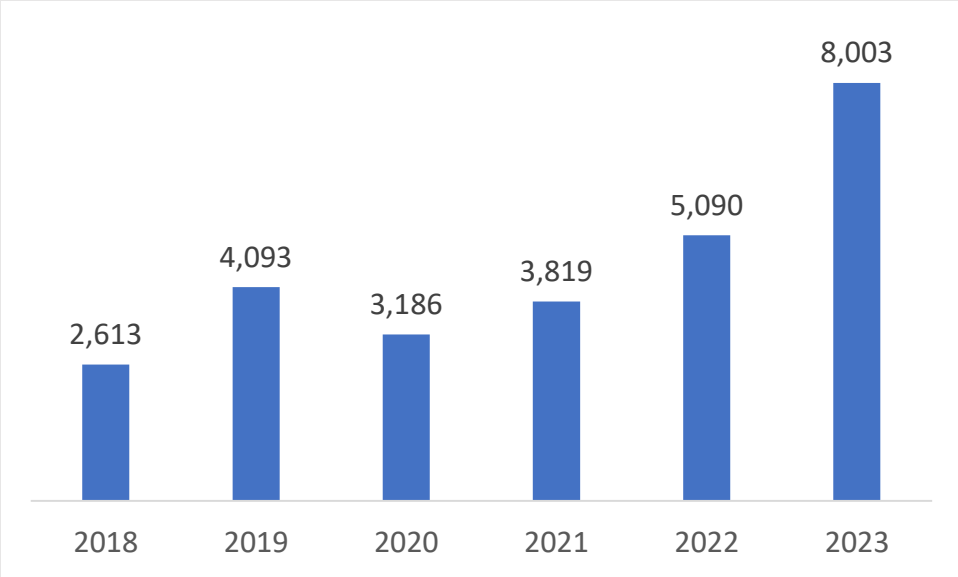


**Nights,
Short-term rentals, 2023**



+57% (vs. 2022)
+96% (vs. 2019)

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



Source: Eurostat (experimental statistics).



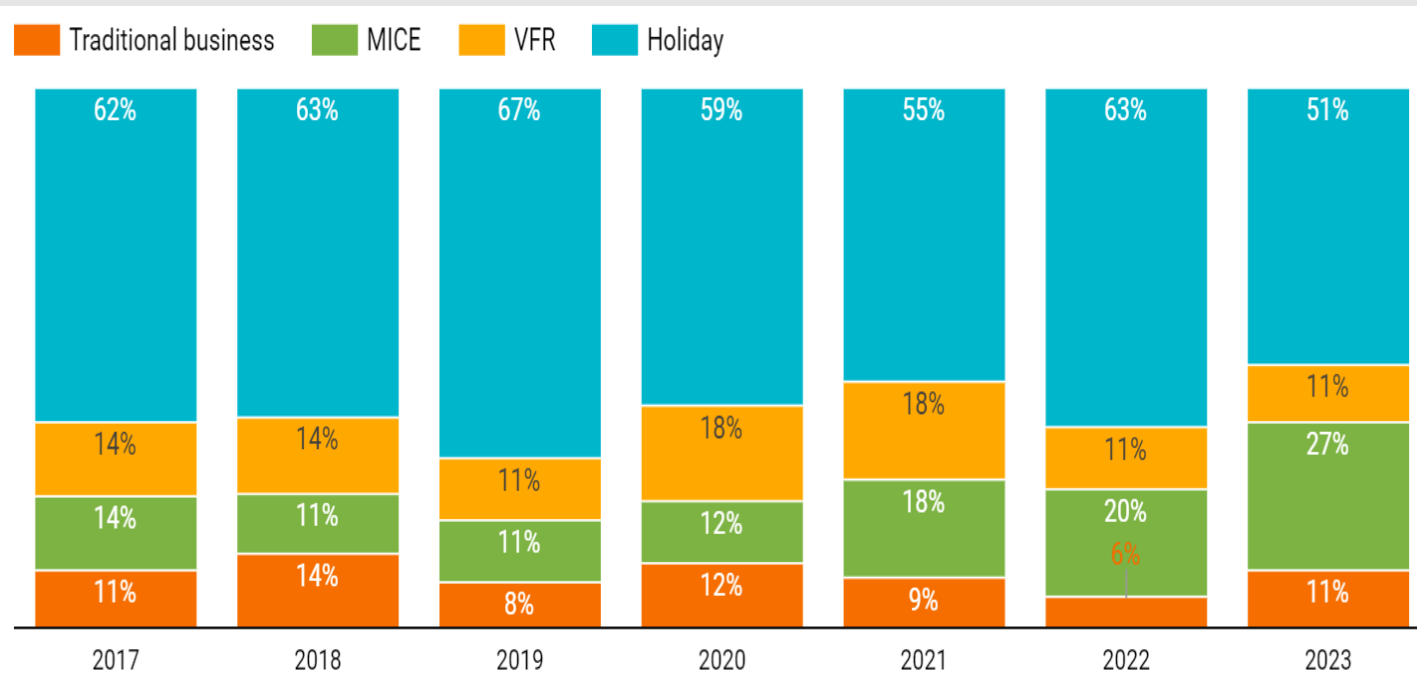
Characteristics of Swiss inbound trips to Luxembourg

Swiss trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2017-2023

Swiss trips to Luxembourg, 2017-2023



2023

Switzerland to Luxembourg Europe to Luxembourg

Holiday	51%	62%
VFR	11%	15%
MICE	27%	14%
Traditional Business	11%	9%



Travel behaviour of Swiss leisure visitors in Luxembourg

Holiday types

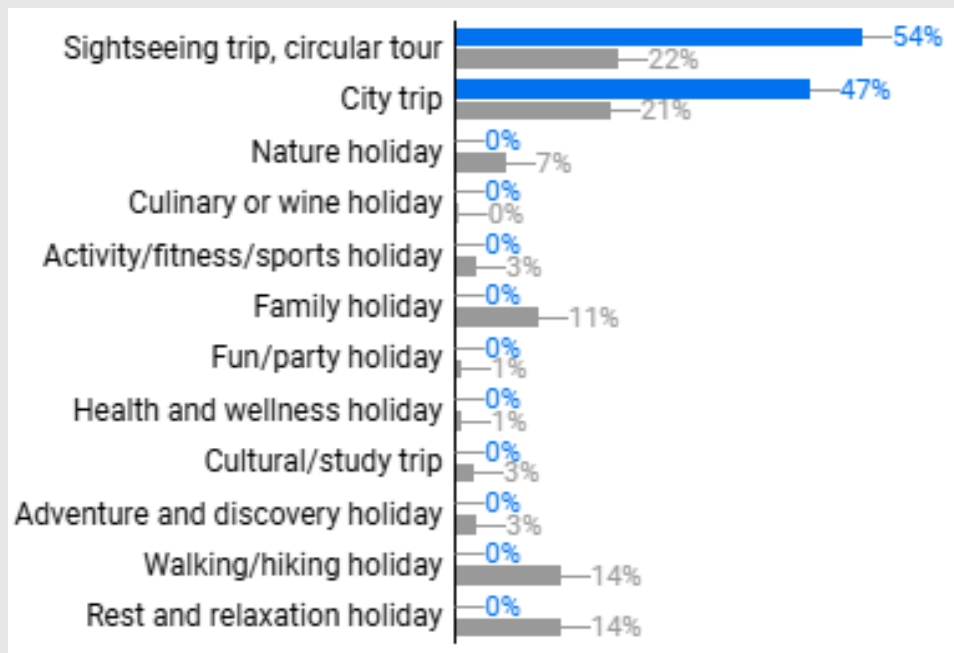
Inbound leisure visitors with overnight, 2022-2023



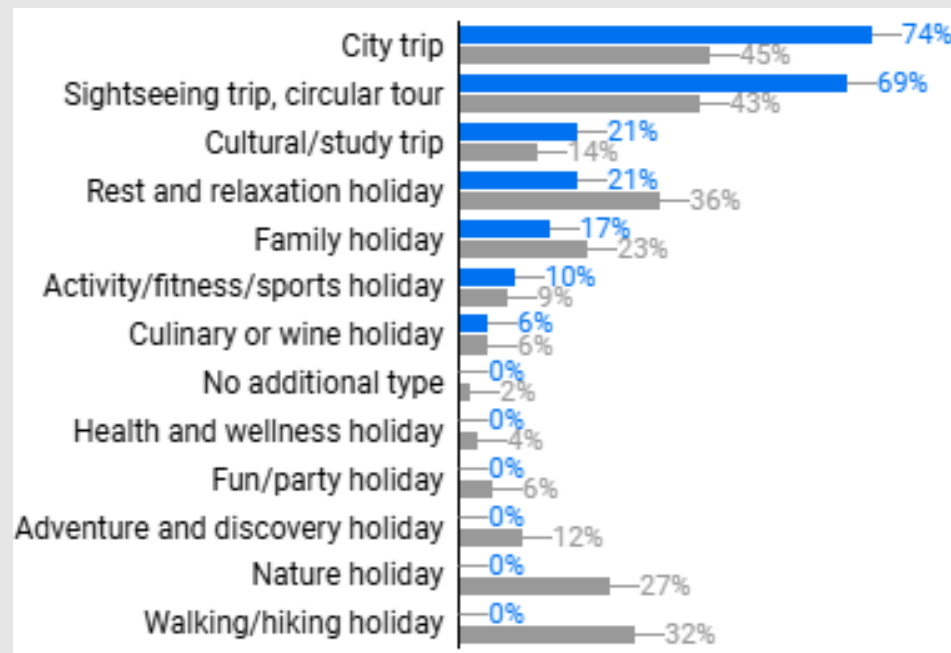
Switzerland

All inbound

Main holiday types

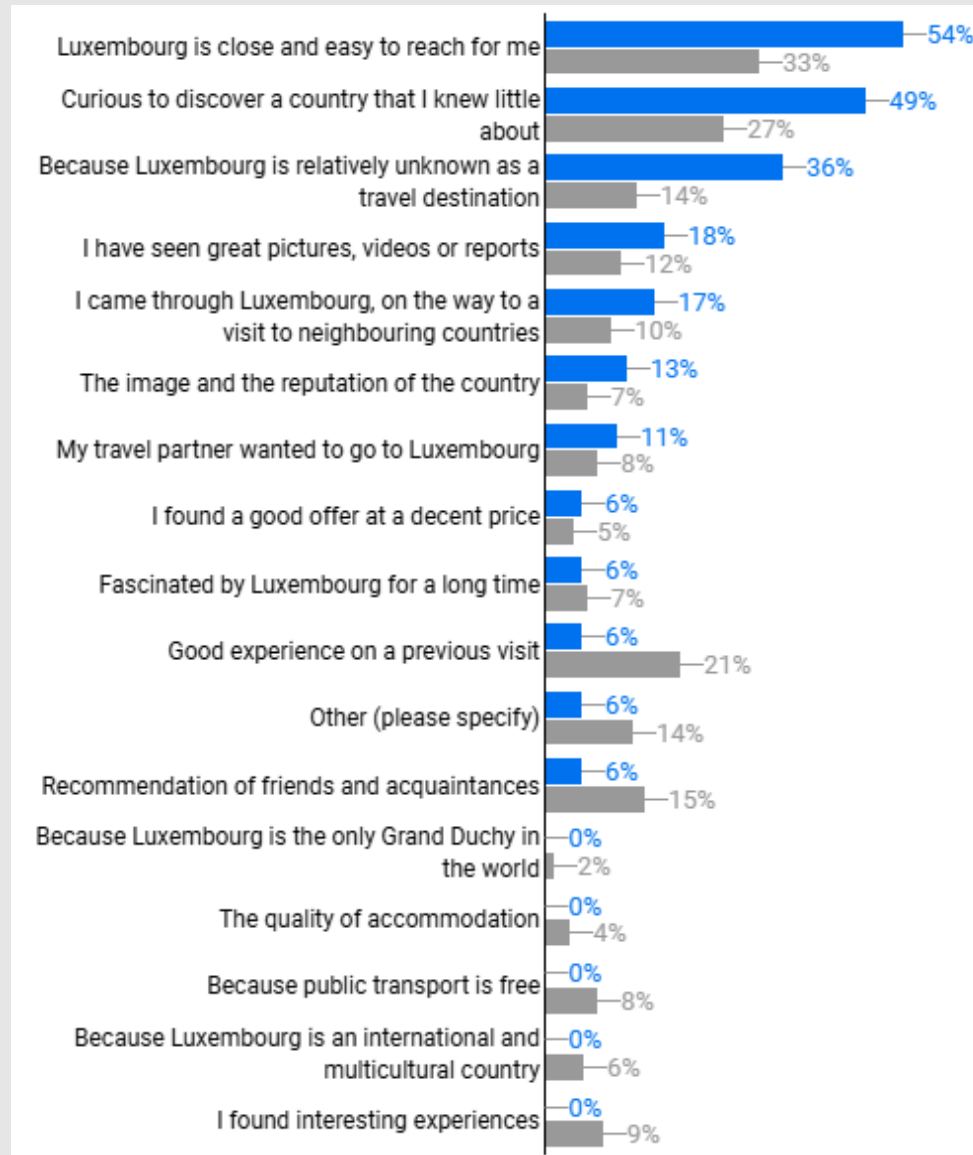
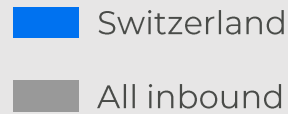


Additional holiday types



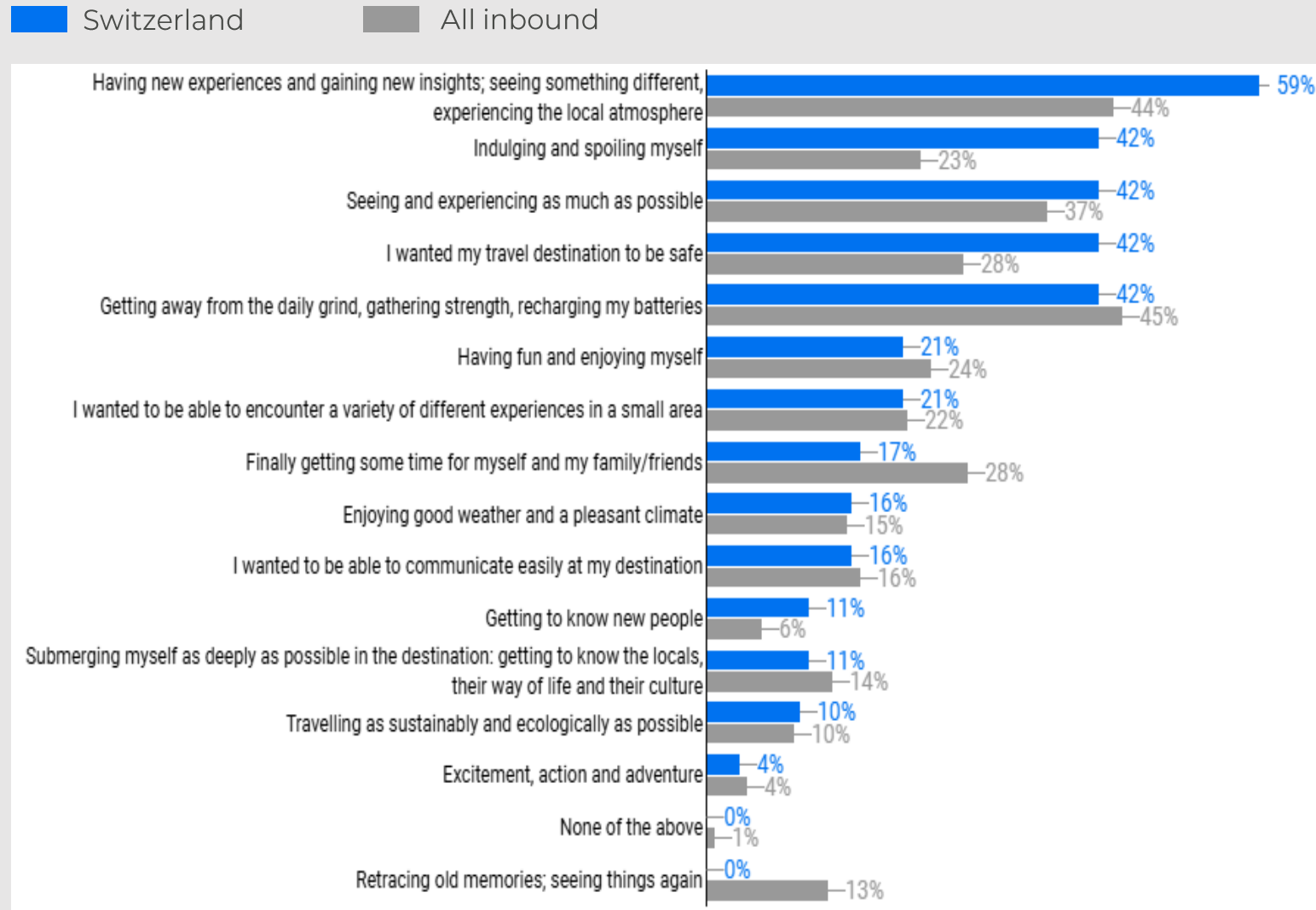
Key decision criteria for choosing Luxembourg

Inbound leisure visitors with overnight (*), 2022-2023



Key travel motivations

Inbound leisure visitors with overnight, 2022-2023



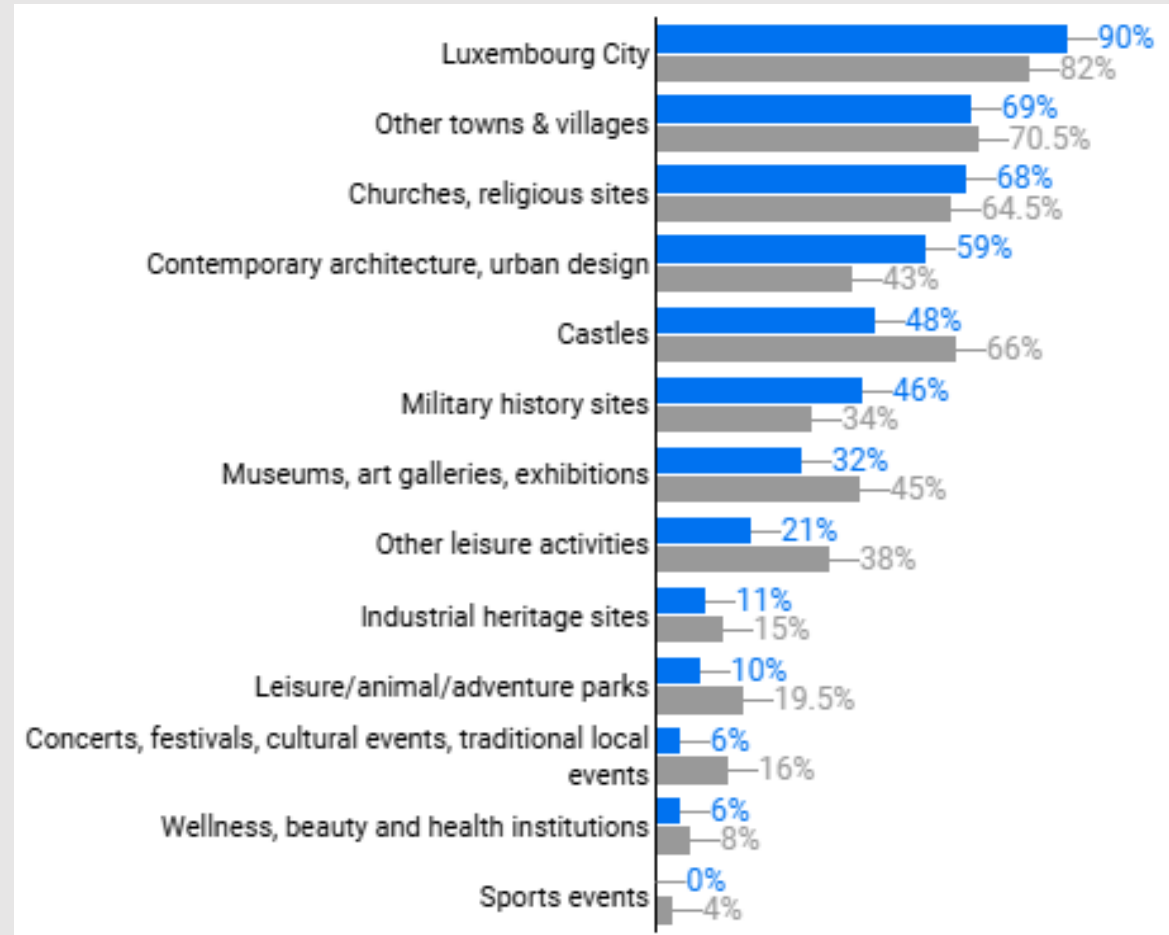


Type of places visited in Luxembourg

Inbound leisure visitors with overnight, 2022-2023

Switzerland

All inbound

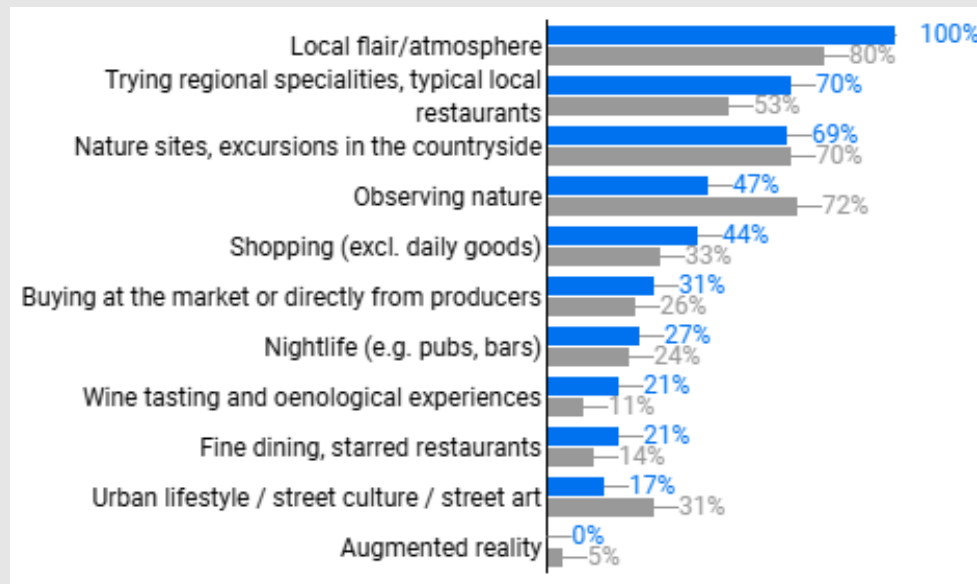


Activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2022-2023



Non-sporting activities



Switzerland
All inbound

Sporting activities



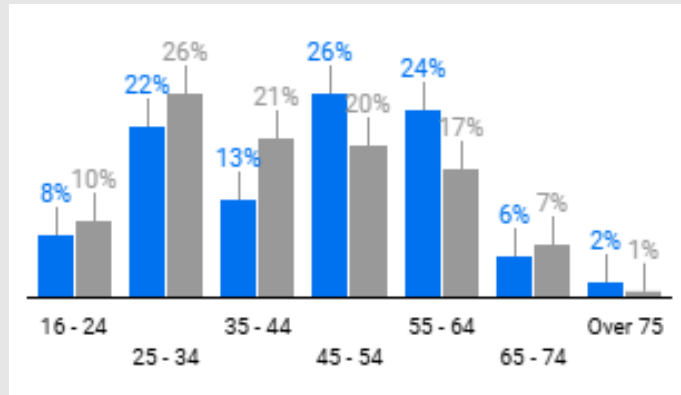
Transport, travel party, age, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2022-2023

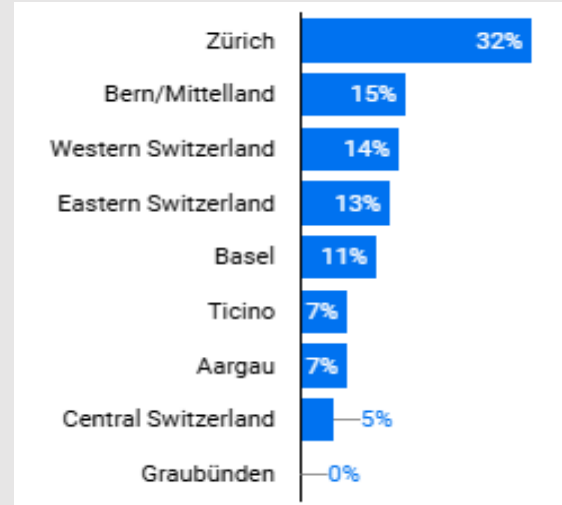


Switzerland All inbound

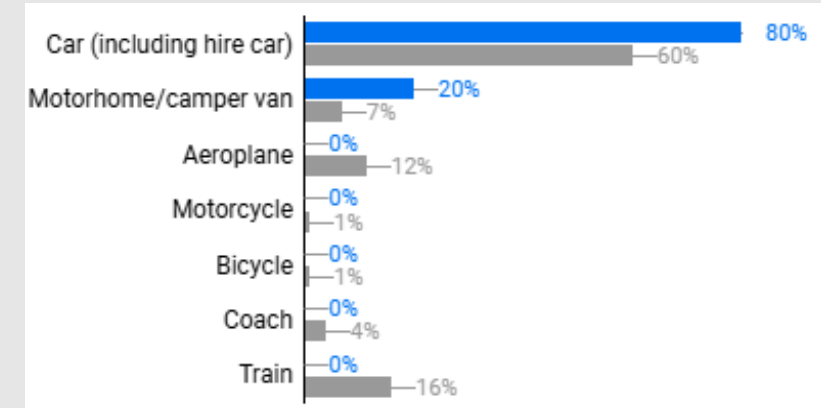
Age groups



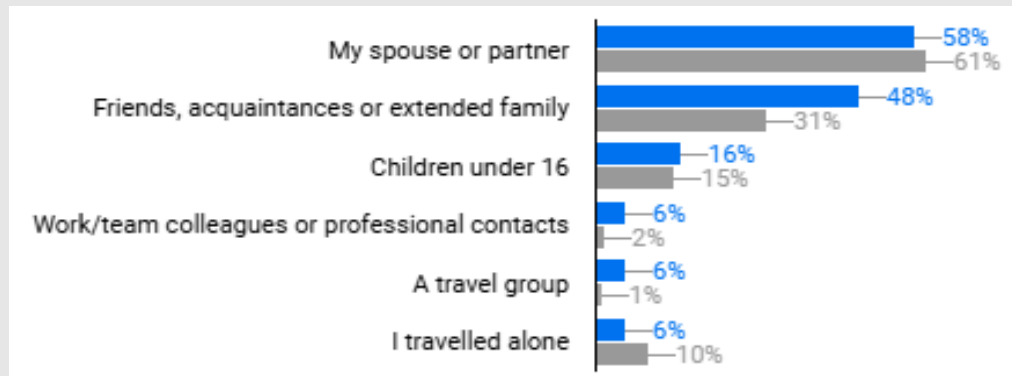
Region of origin



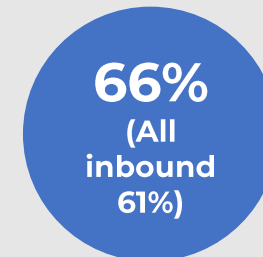
Mode of transport to access Luxembourg



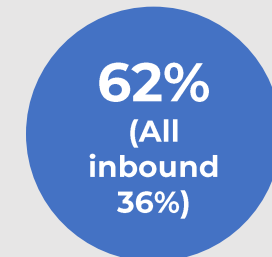
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

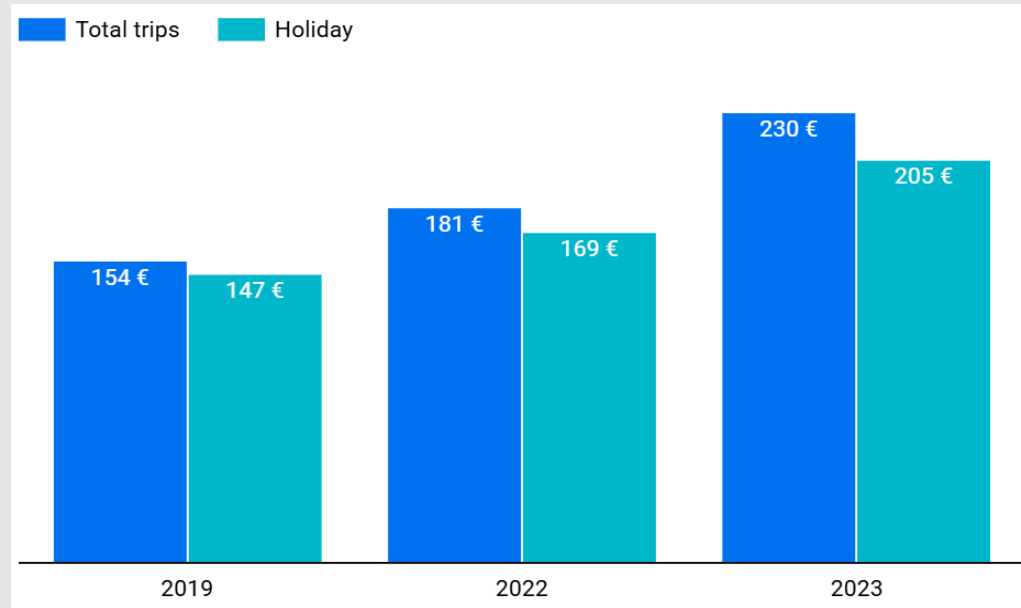


Expenditure

Inbound trips to Luxembourg with overnight



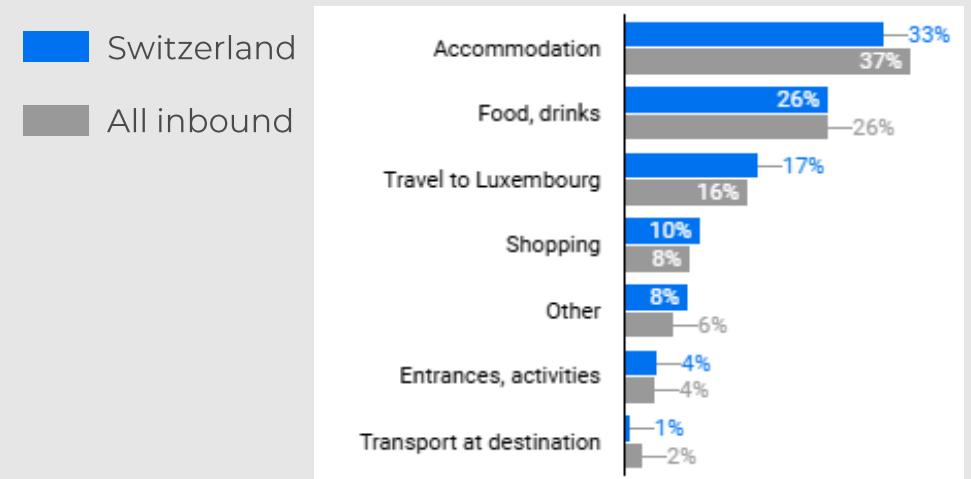
Swiss trips to Luxembourg : average spend per pers. per day



2023

	Switzerland to Luxembourg	Europe to Luxembourg
Spend/day/pers. on all trips	230 €	152 €
Spend/day/pers. on holiday trips	205 €	144 €

Expenditure of leisure inbound overnight visitors by categories, 2022-2023



Quality vs. price orientation

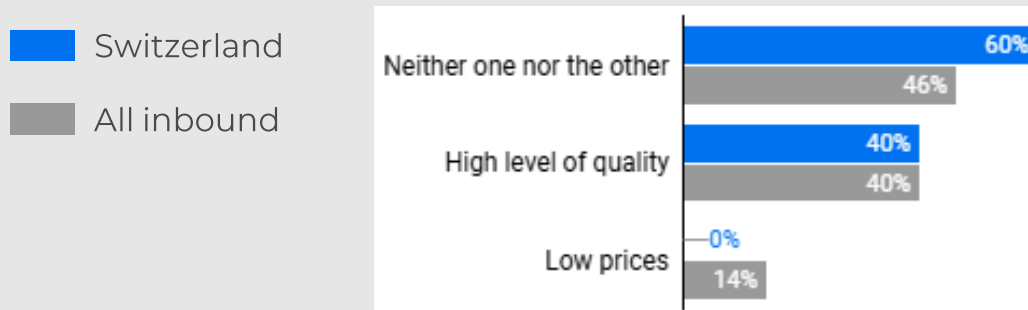
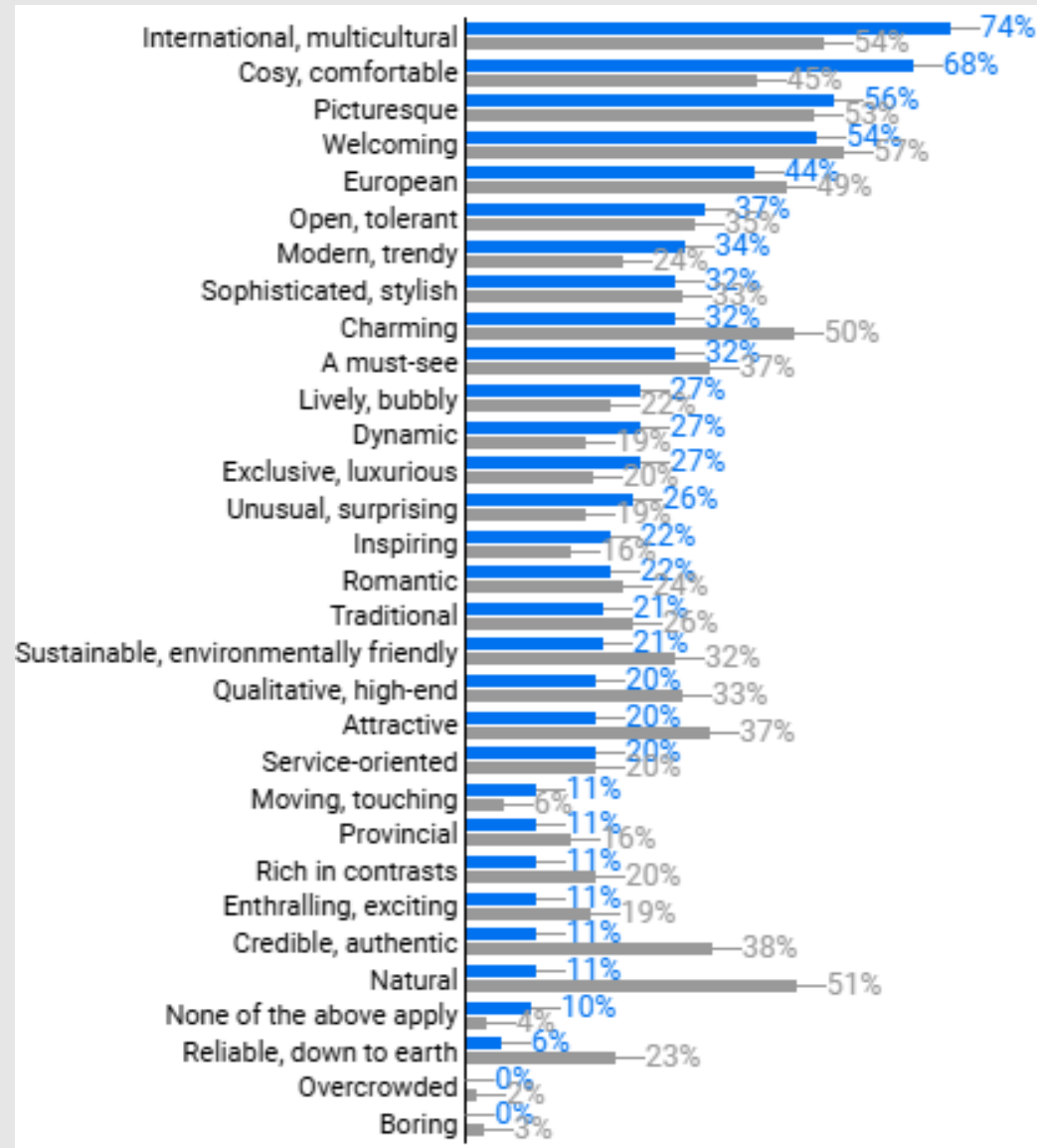
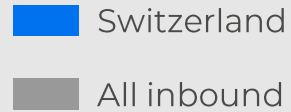


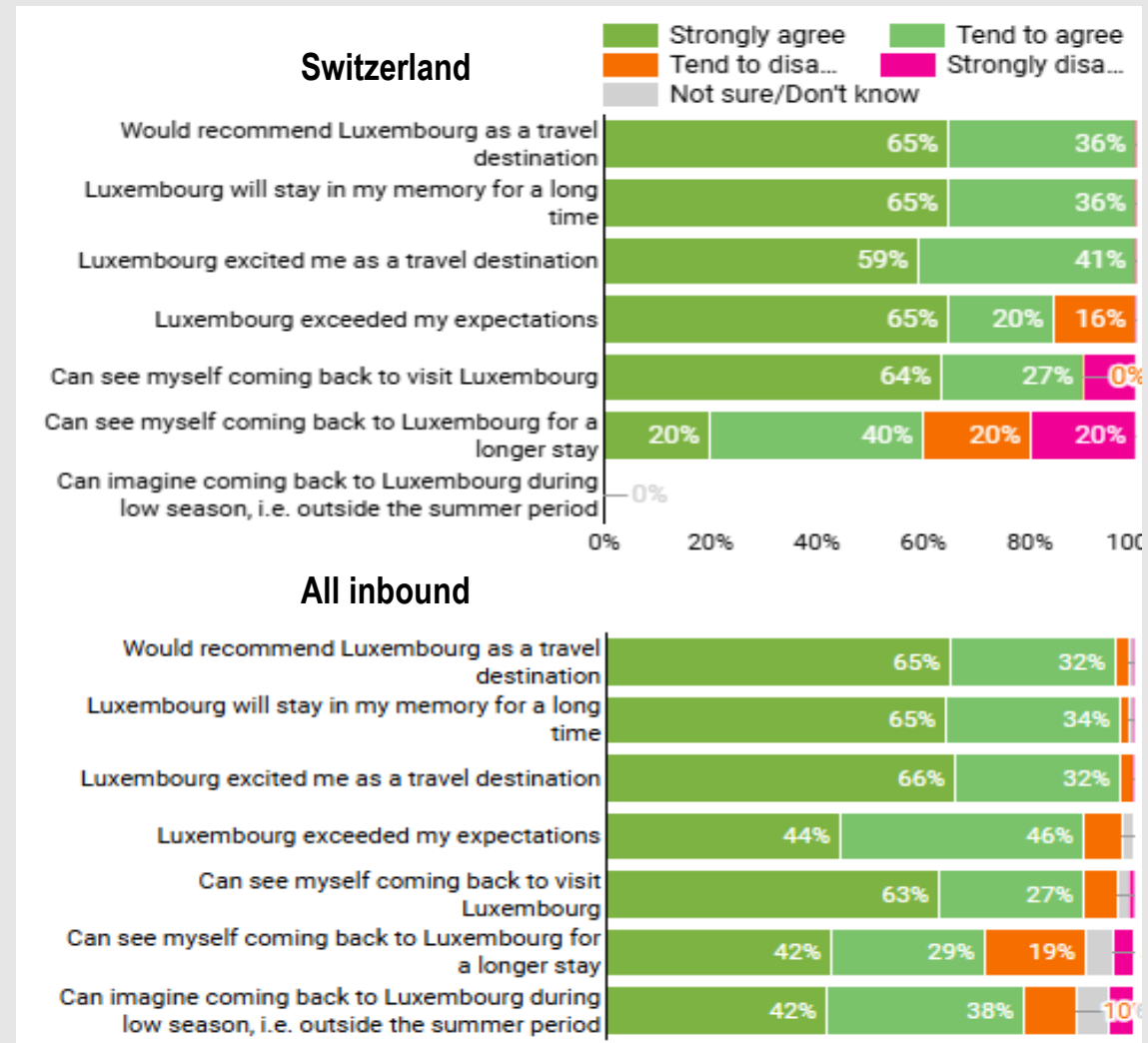
Image perception of Luxembourg

Inbound leisure visitors with overnight, 2022-2023



Visitor satisfaction and recommendation

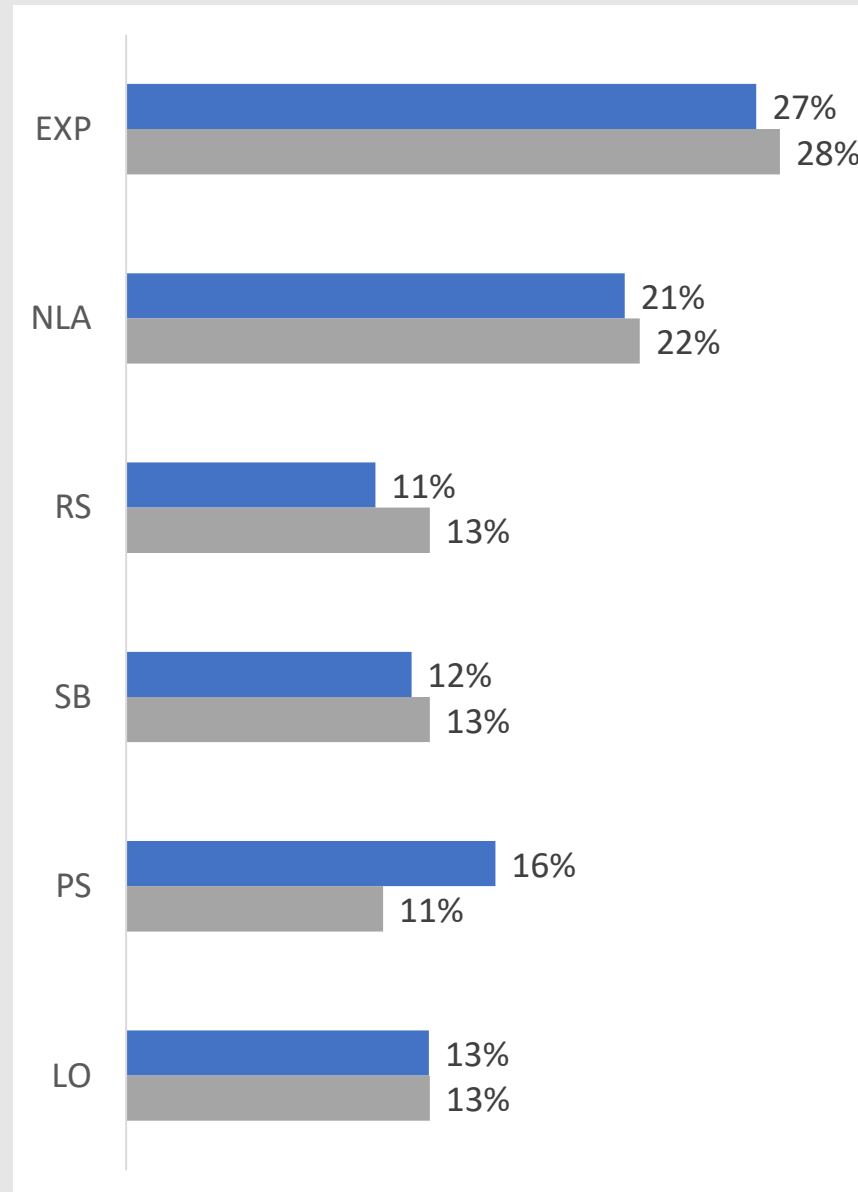
Inbound leisure visitors with overnight, 2022-2023



LFT Target Segments



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



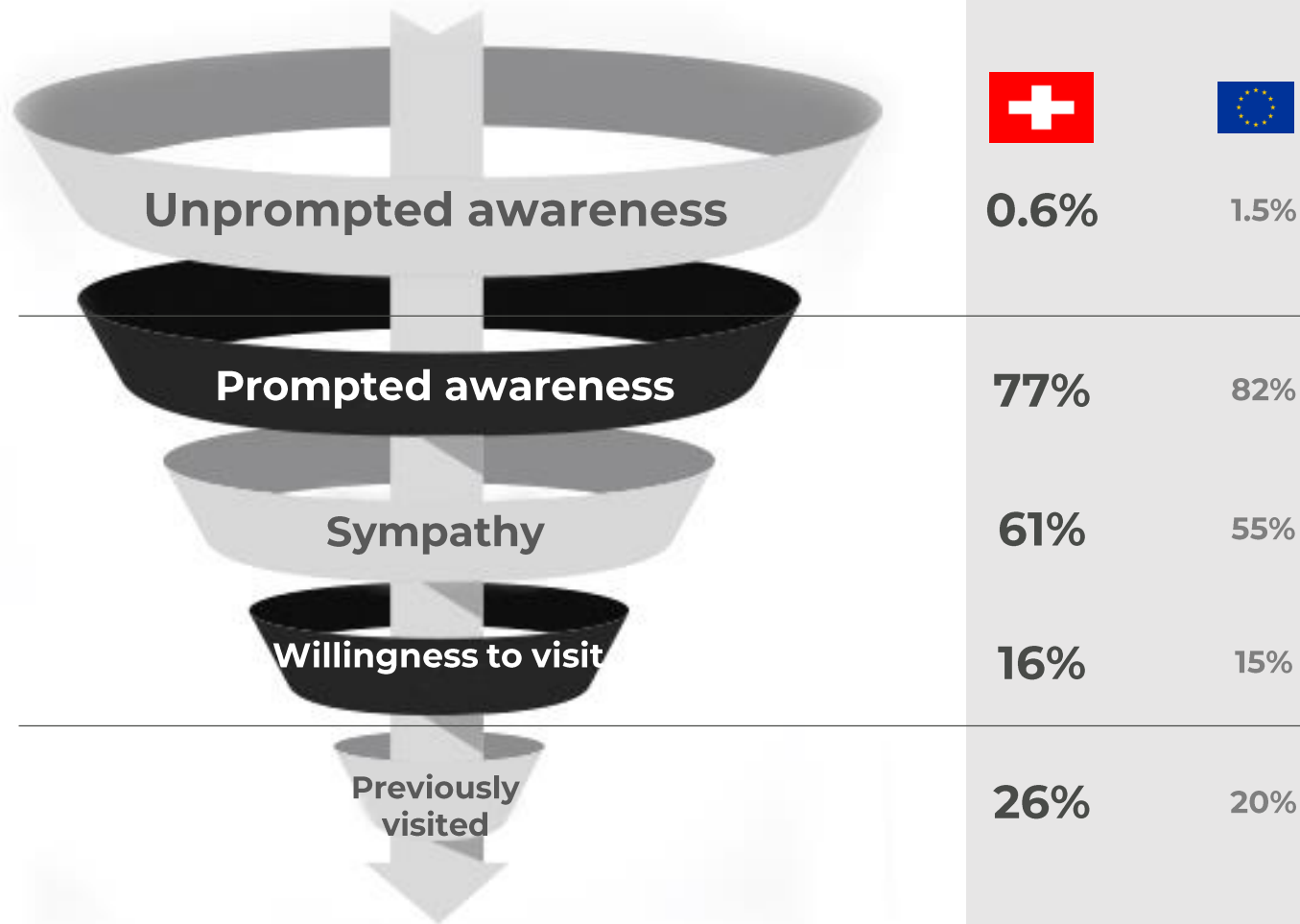
Switzerland
All inbound



Brand strength & Growth potential

Brand Funnel 2024

Assessing Luxembourg's brand strength as a destination

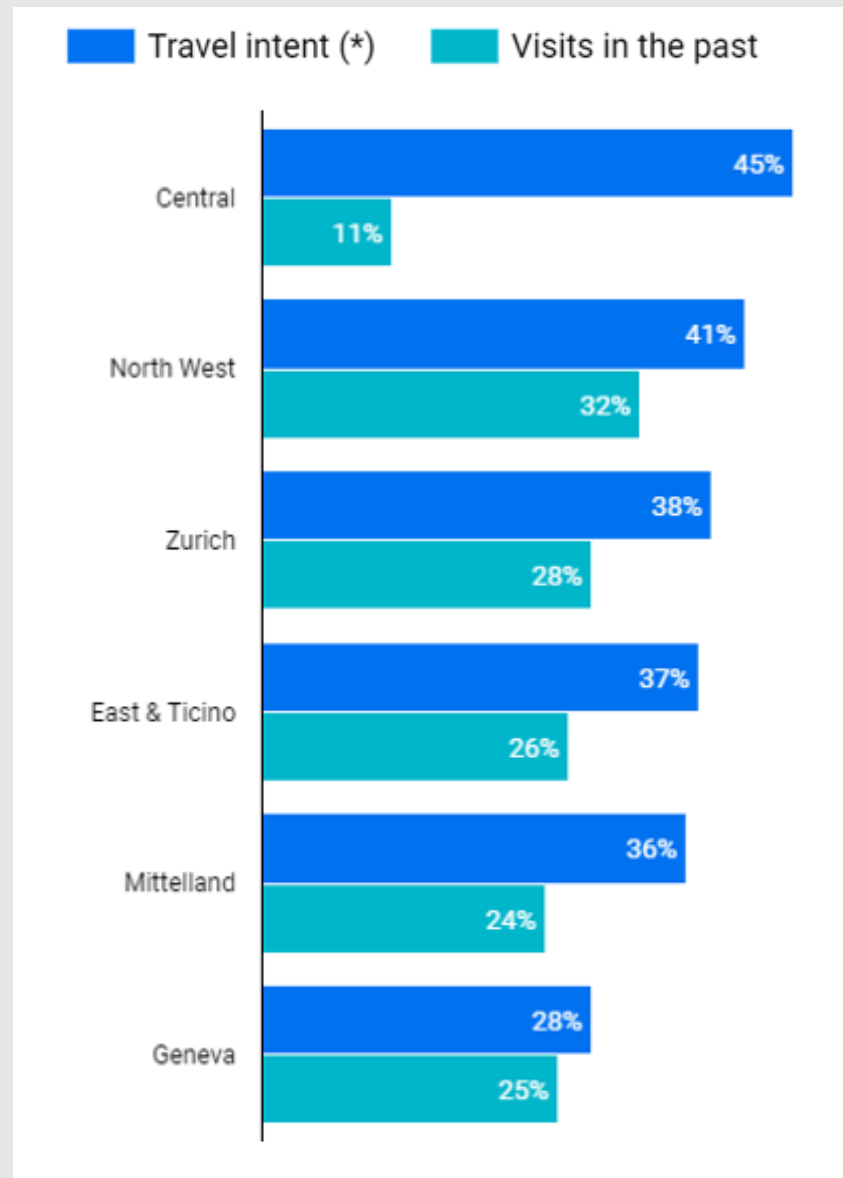


**Core future visitor potential
from Switzerland (*)**
1.1 million

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	71%
Culinary	2	2	71%
Resting/Relaxation	1	3	70%
Immersive travel	6	4	68%
Sightseeing	4	5	66%
City	5	6	66%
Architecture/townscapes	7	7	66%
Fun/entertainment	8	8	62%
Learning/new skills	14	9	61%
Culture	11	10	60%
Exchanging with locals	13	11	60%
Castles	9	12	59%
Events	16	13	59%
History/Unesco	10	14	58%
Family	12	15	57%
Travelling by train	18	16	57%
Hiking	17	17	55%
Sustainability	15	18	55%
Nightlife (**)	20	19	53%
Adventure/action	19	20	53%
Shopping	23	21	49%
Active-sports	27	22	49%
Wellness	25	23	49%
Wine	21	24	49%
Luxury	24	25	45%
Industrial heritage	28	26	44%
Countryside	22	27	43%
Remembrance	26	28	43%
Cycling	31	29	43%
Camping	29	30	42%
Film locations	30	31	42%
MTB	32	32	35%
Motorcycling	33	33	32%




(*) 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
City	1	1	40%
Resting/Relaxation	2	2	36%
Culinary	3	3	33%
Architecture/townscapes	4	4	30%
Nature	5	5	30%
Luxury	9	6	29%
Culture	6	7	29%
Castles	7	8	29%
Family	8	9	28%
Shopping	10	10	27%
Fun/entertainment	13	11	25%
Nightlife (***)	14	12	21%
History/Unesco	12	13	21%
Events	23	14	20%
Wine	15	15	19%
Active-sports	21	16	18%
Wellness	16	17	18%
Remembrance	26	18	18%
Hiking	11	19	17%
Industrial heritage	24	20	17%
Countryside	17	21	16%
Camping	19	22	16%
Sustainability	18	23	16%
Cycling	20	24	15%
Adventure/action	22	25	15%
MTB	25	26	13%

Growth potential for themes (**)

- Nature
- Culture
- Castles
- History & Unesco
- Sustainability
- Hiking
- Cycling
- MTB
- Adventure/action
- Culinary

(*) 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	43%
clean	2	2	41%
of high quality	3	3	36%
open-minded, tolerant, international	6	4	30%
authentic, real	5	5	30%
welcoming, hospitable	4	6	30%
exclusive, luxurious	8	7	28%
attractive, appealing	7	8	25%
dynamic, modern	9	9	23%
service oriented	10	10	21%
varied, diversified	12	11	21%
surprising	11	12	21%
lively, trendy	13	13	20%
not overcrowded / insider tip	14	14	18%
sustainable	15	15	17%
affordable	16	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.



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