



Luxembourg for Tourism

Market profile

**BELGIUM**

**2023**





# **Economic indicators & General Travel Demand**

# Economic indicators - General travel demand

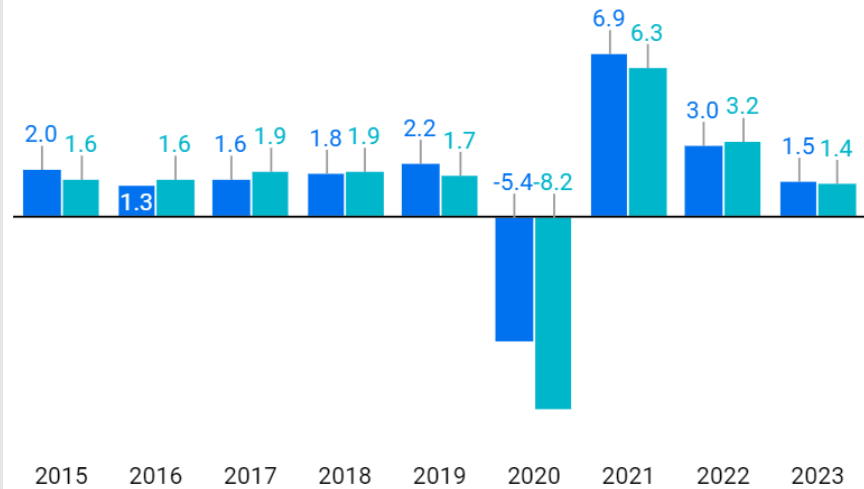


## Economy & population

GDP (\$) per capita      Unemployment (%)      Population (mn)      Inflation (%)  
**53,659**                      **5.5**                      **11.7**                      **2.3**

### GDP and Consumer spending, % annual change

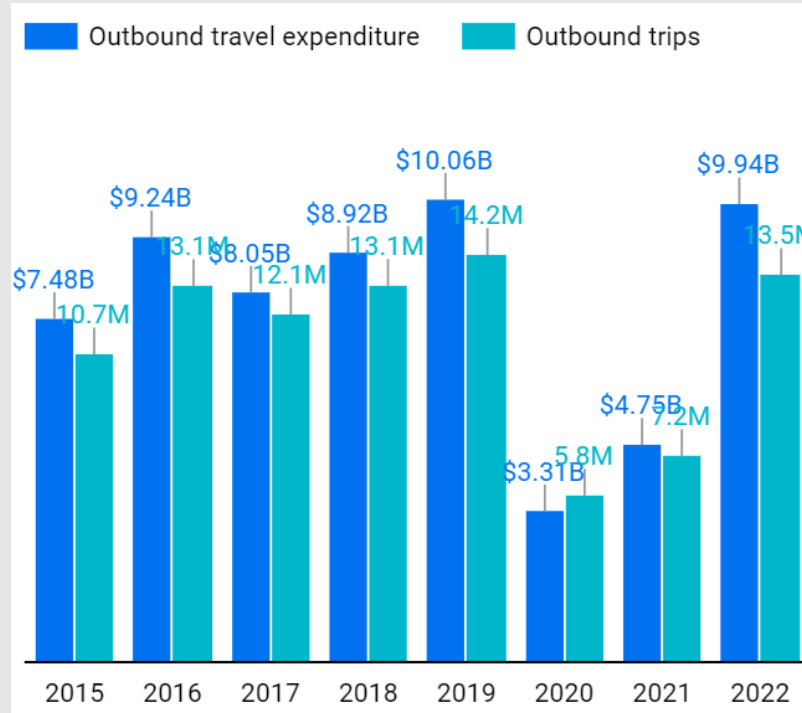
■ GDP change      ■ Consumer spend



Share of short trips (1-3 nights),  
 % all outbound trips (2022)  
**30.1%**

## Outbound trips and travel expenditure

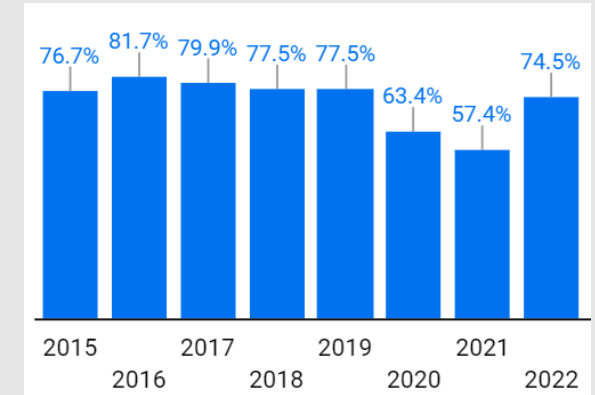
■ Outbound travel expenditure      ■ Outbound trips



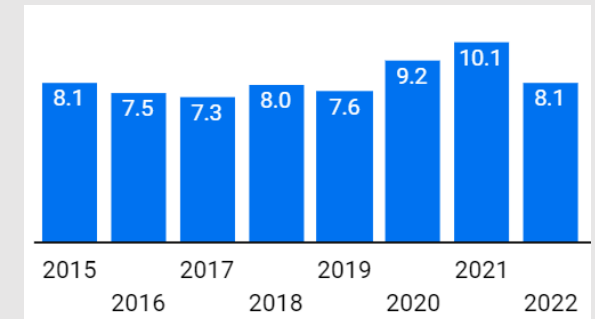
Average spend  
 per outbound trip (2019)  
**709 \$**

Outbound travel intensity  
**1.24 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)  
**92.4%**



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

# Nights, arrivals & length of stay in paid accommodation 2023



**Nights,  
paid accommodation, 2023**



**+4% (vs. 2022)**  
**-10% (vs. 2019)**

**Arrivals,  
paid accommodation, 2023**



**+6% (vs. 2022)**  
**-10% (vs. 2019)**

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



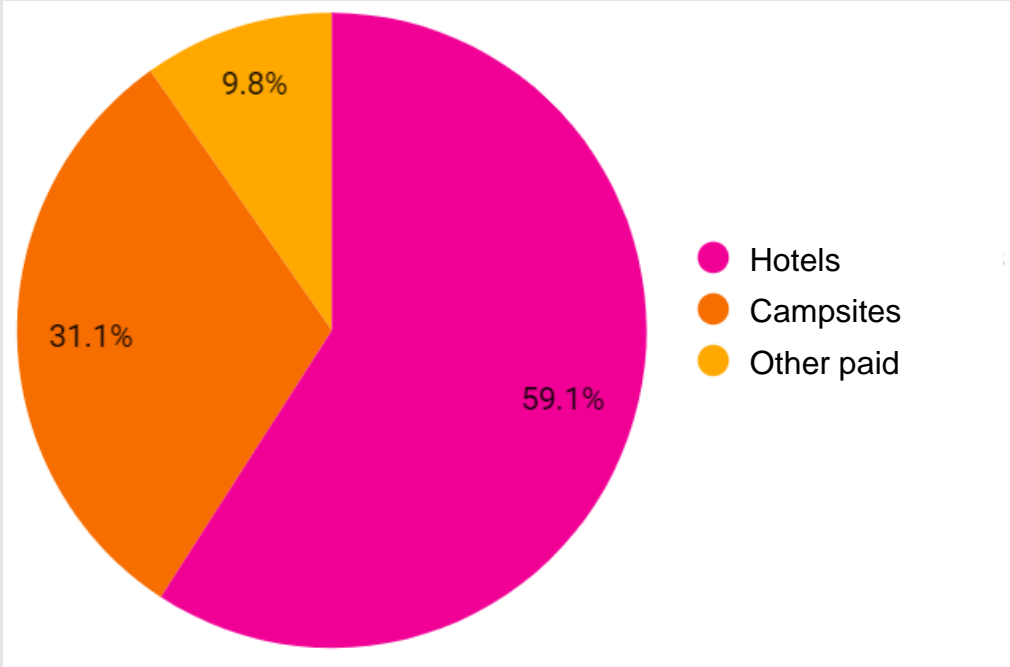
**-0.06 days (vs. 2022)**  
**-0.01 days (vs. 2019)**

# Nights & arrivals in paid accommodation

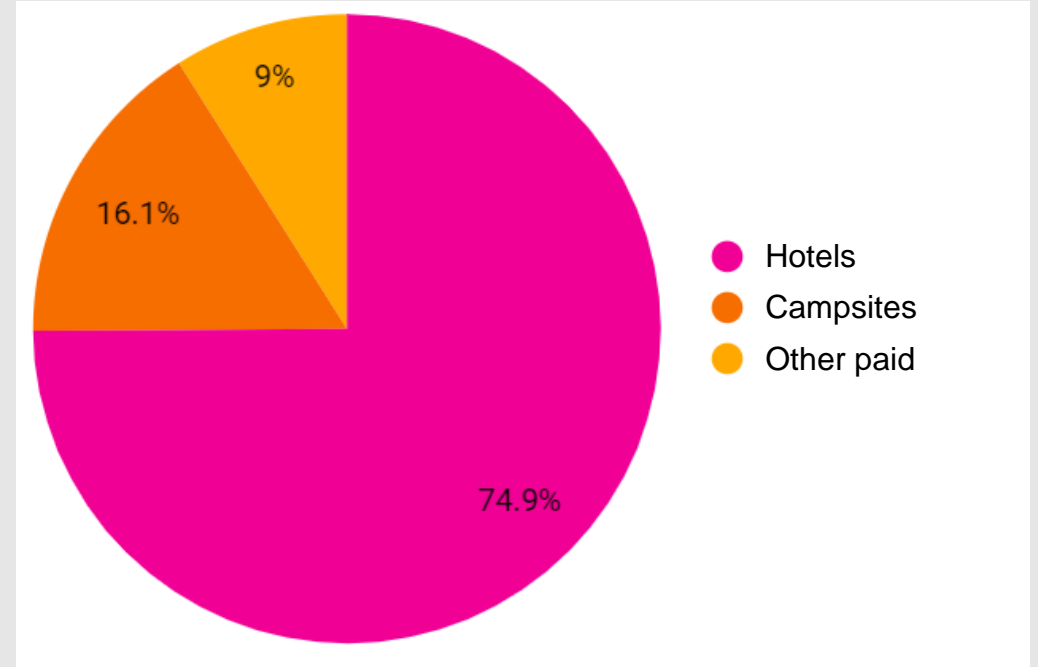


## Type of accommodation, 2023

**Nights,  
paid accommodation, 2023**



**Arrivals,  
paid accommodation, 2023**



<b>Hotels</b>	<b>279.632</b>	+3% (vs. 2022) -20% (vs. 2019)
<b>Campsites</b>	<b>146.957</b>	+4% (vs. 2022) +13% (vs. 2019)
<b>Other paid accomm.</b>	<b>46.232</b>	+9% (vs. 2022) +4% (vs. 2019)

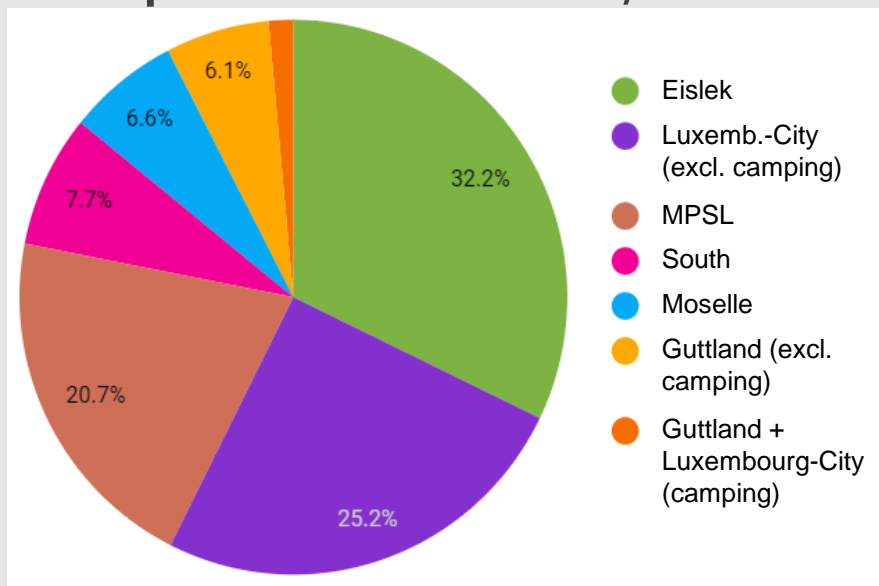
<b>Hotels</b>	<b>170.747</b>	+5% (vs. 2022) -17% (vs. 2019)
<b>Campsites</b>	<b>36.732</b>	+5% (vs. 2022) +30% (vs. 2019)
<b>Other paid accomm.</b>	<b>20.501</b>	+18% (vs. 2022) +15% (vs. 2019)

# Nights & arrivals in paid accommodation

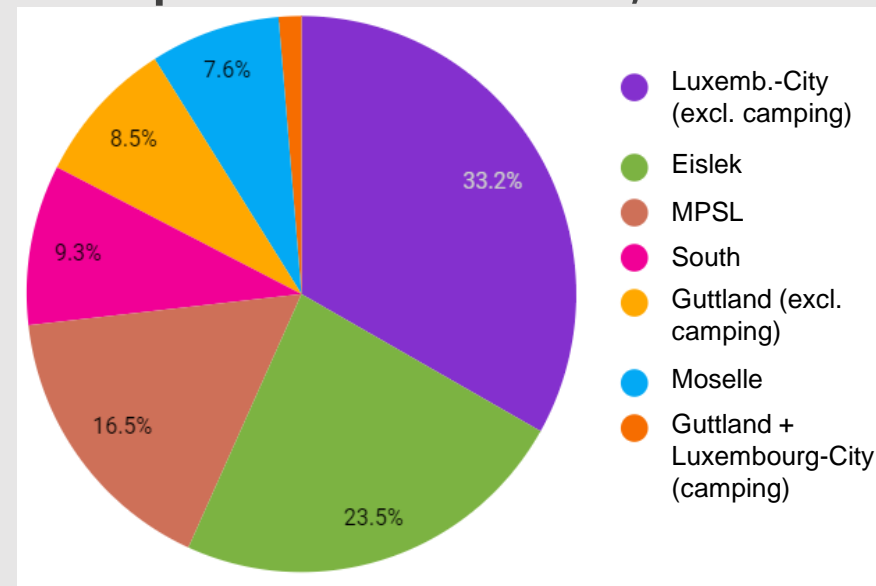
## Regions, 2023



### Nights, paid accommodation, 2023



### Arrivals, paid accommodation, 2023



<b>Eislek</b>	<b>152.151</b>	+1% (vs. 2022) -3% (vs. 2019)
<b>Lux.-City (excl. camping)</b>	<b>119.247</b>	+10% (vs. 2022) -24% (vs. 2019)
<b>MPSL</b>	<b>97.880</b>	+12% (vs. 2022) +8% (vs. 2019)
<b>South</b>	<b>36.582</b>	-12% (vs. 2022) +2% (vs. 2019)
<b>Moselle</b>	<b>31.152</b>	-4% (vs. 2022) -21% (vs. 2019)
<b>Guttland (excl. camping)</b>	<b>28.941</b>	+3% (vs. 2022) -27% (vs. 2019)
<b>Guttland/Lux.-City (camping)</b>	<b>6.868</b>	+2% (vs. 2022) -9% (vs. 2019)

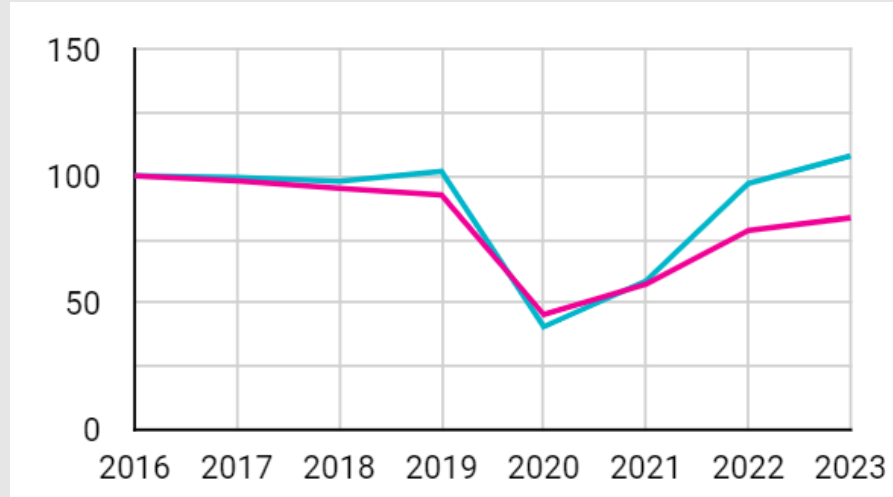
<b>Lux.-City (excl. camping)</b>	<b>75.696</b>	+10% (vs. 2022) -19% (vs. 2019)
<b>Eislek</b>	<b>53.689</b>	+0% (vs. 2022) -9% (vs. 2019)
<b>MPSL</b>	<b>37.520</b>	+16% (vs. 2022) +23% (vs. 2019)
<b>South</b>	<b>21.266</b>	+2% (vs. 2022) +2% (vs. 2019)
<b>Guttland (excl. camping)</b>	<b>19.350</b>	+7% (vs. 2022) -18% (vs. 2019)
<b>Moselle</b>	<b>17.414</b>	-1% (vs. 2022) -18% (vs. 2019)
<b>Guttland/Lux.-City (camping)</b>	<b>3.045</b>	+6% (vs. 2022) -1% (vs. 2019)

# Arrivals in paid accommodation

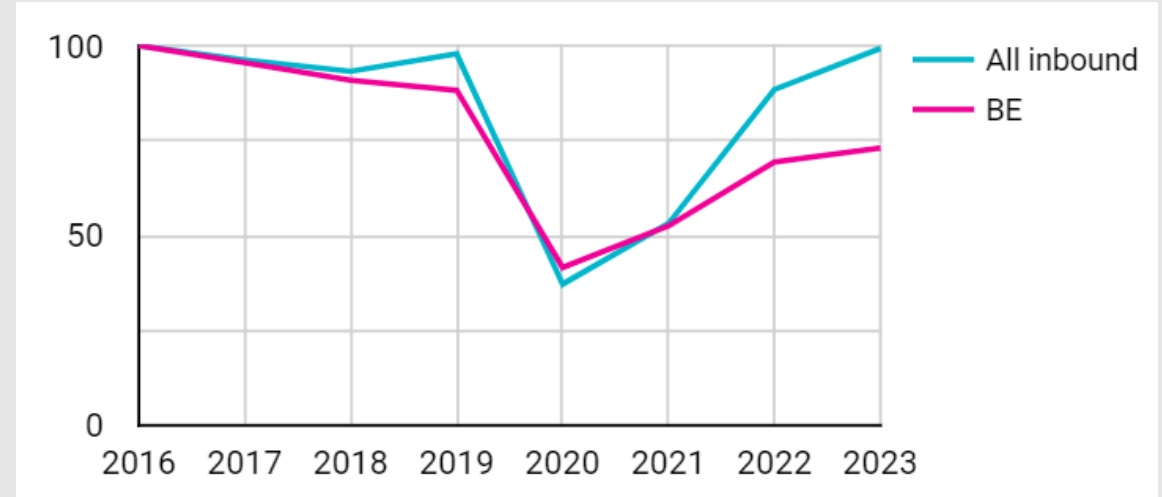
## Trends 2016-2023



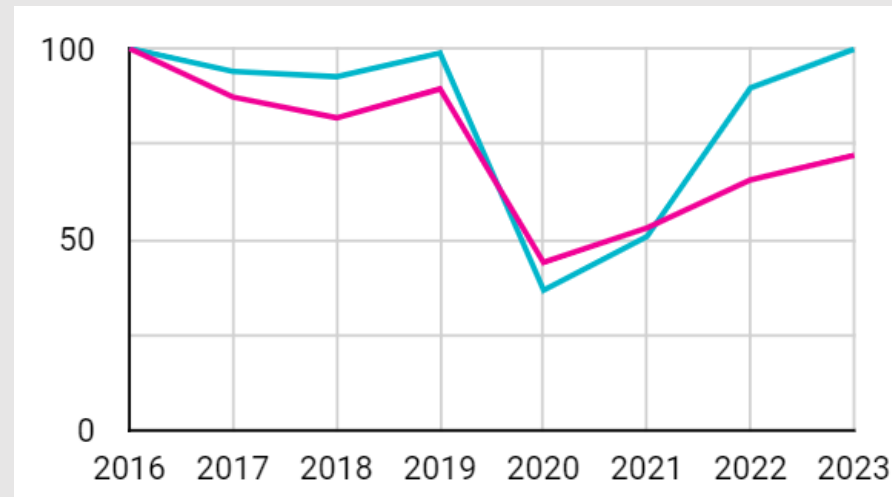
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



(\* ) excluding camping.  
Source: Statec

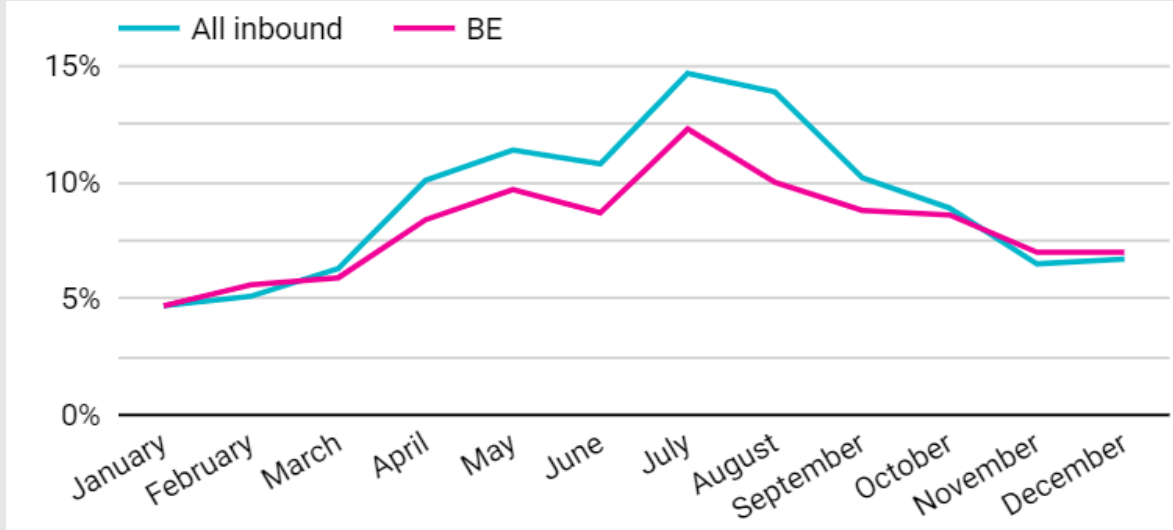


# Arrivals in paid accommodation

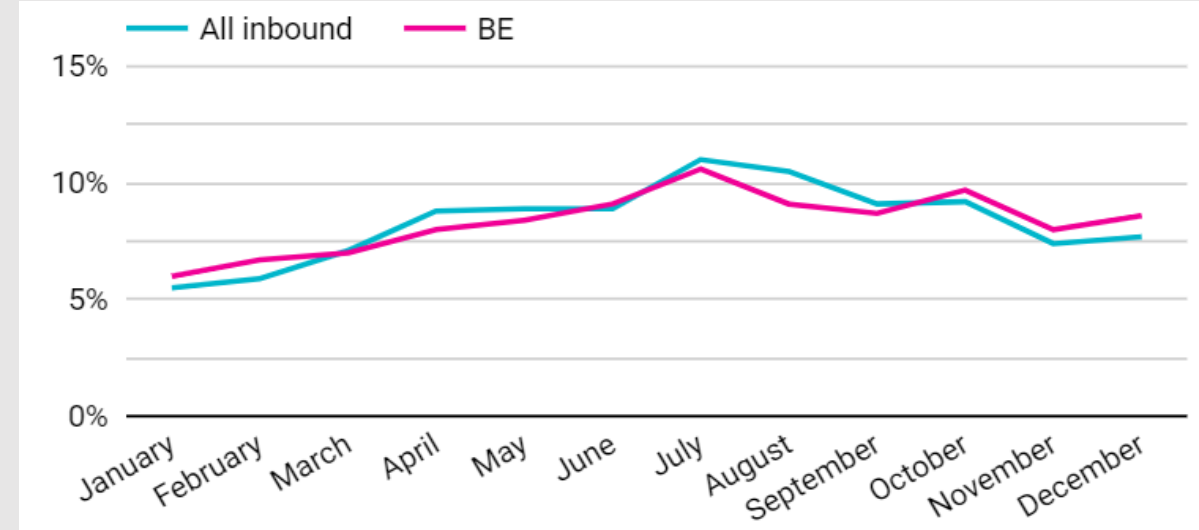
## Seasonality



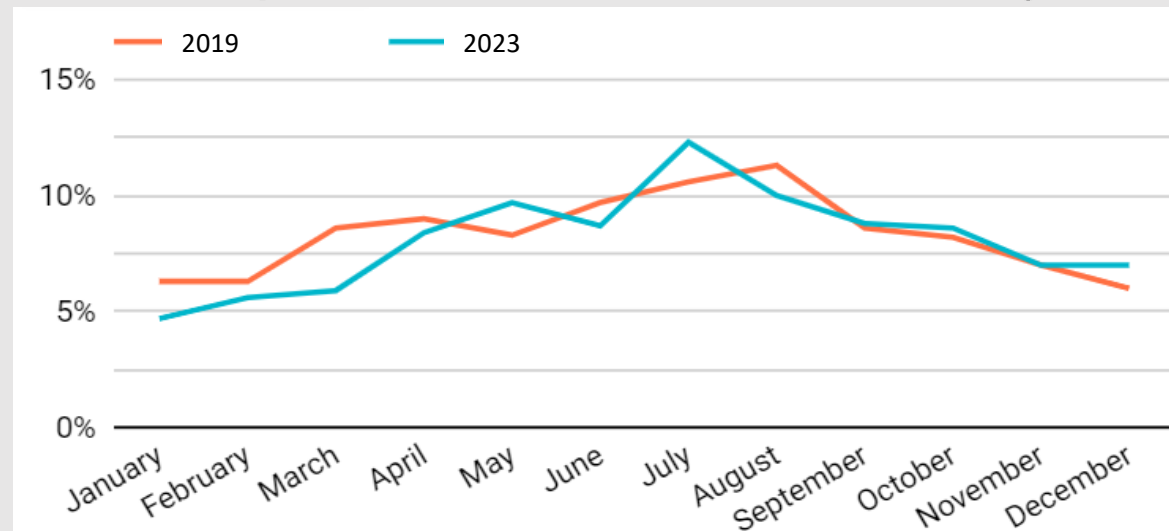
### All paid accommodation, 2023



### Hotels, 2023



### All paid accommodation, arrivals from Belgium



# Short-term rentals

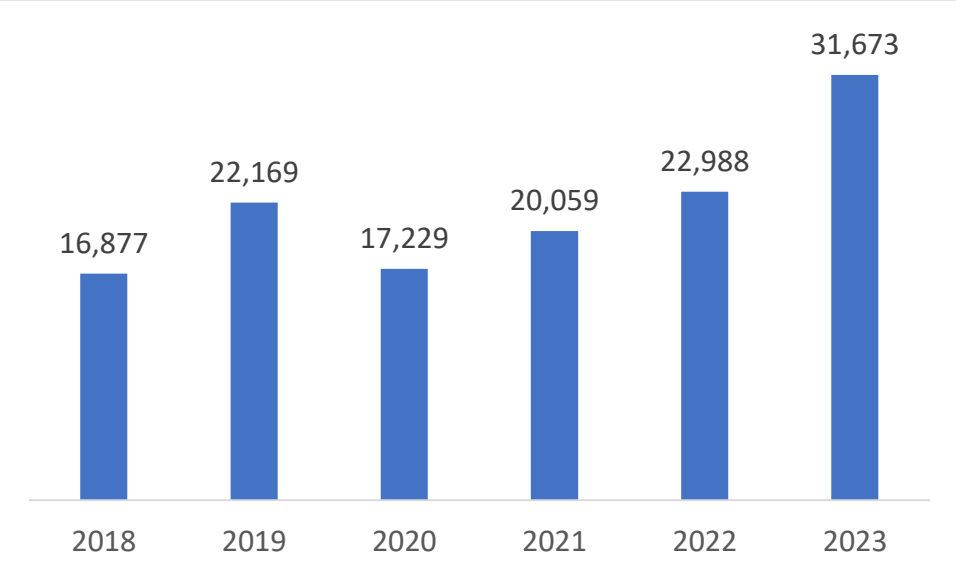


**Nights,  
Short-term rentals, 2023**



**+38% (vs. 2022)**  
**+43% (vs. 2019)**

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





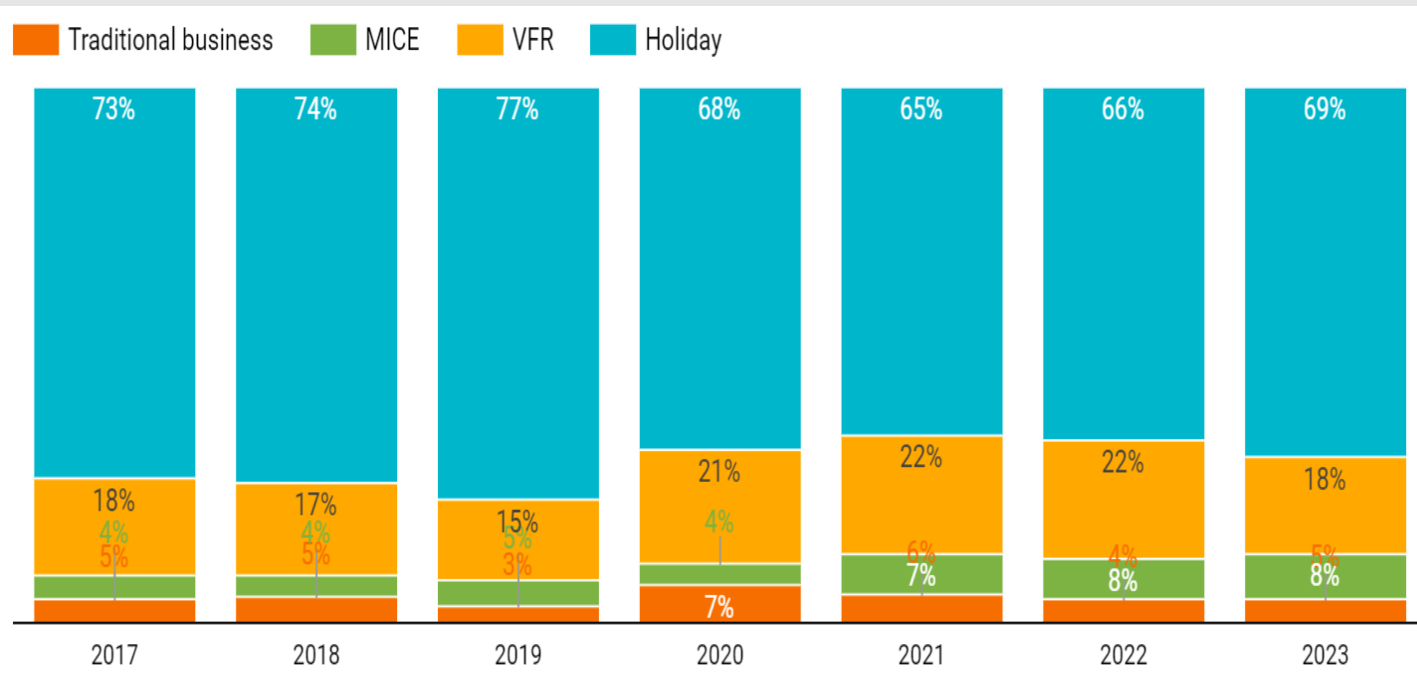
# **Characteristics of Belgian inbound trips to Luxembourg**

# Belgian trips to Luxembourg with overnight (all accommodation)



## Purpose of visit, 2017-2023

Belgian trips to Luxembourg, 2017-2023



### 2023

#### Belgium to Luxembourg      Europe to Luxembourg

Holiday	69%	62%
VFR	18%	15%
MICE	8%	14%
Traditional Business	5%	9%



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



# Holiday types

## Inbound leisure visitors with overnight, 2023



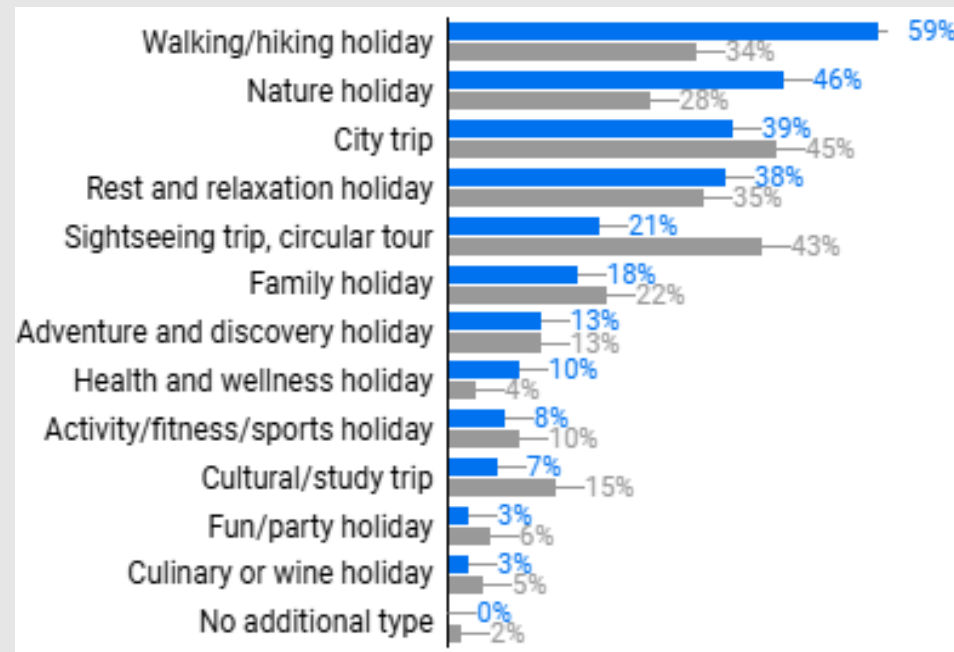
Belgium

All inbound

### Main holiday types

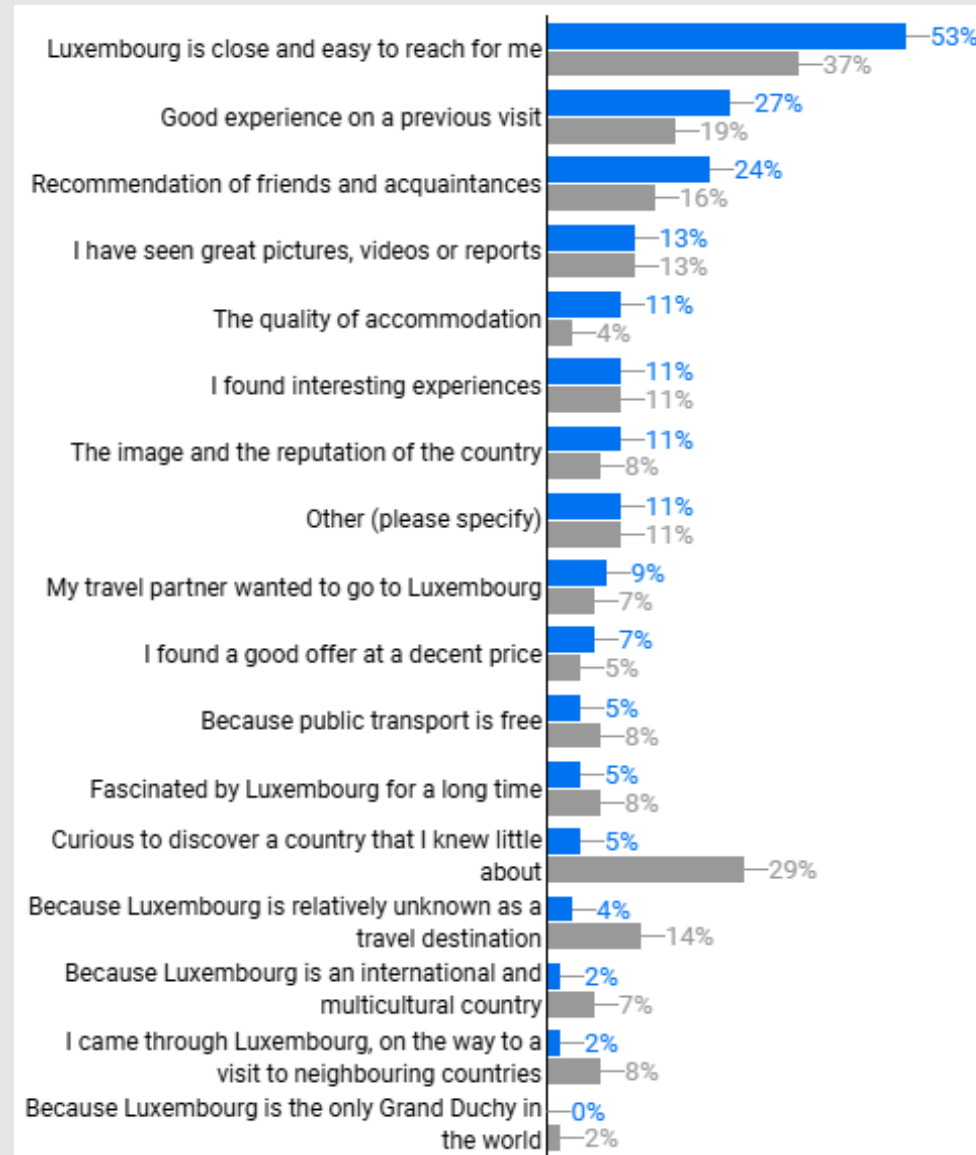
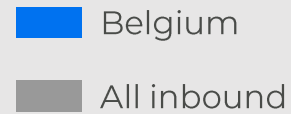


### Additional holiday types



# Key decision criteria for choosing Luxembourg

## Inbound leisure visitors with overnight (\*), 2023



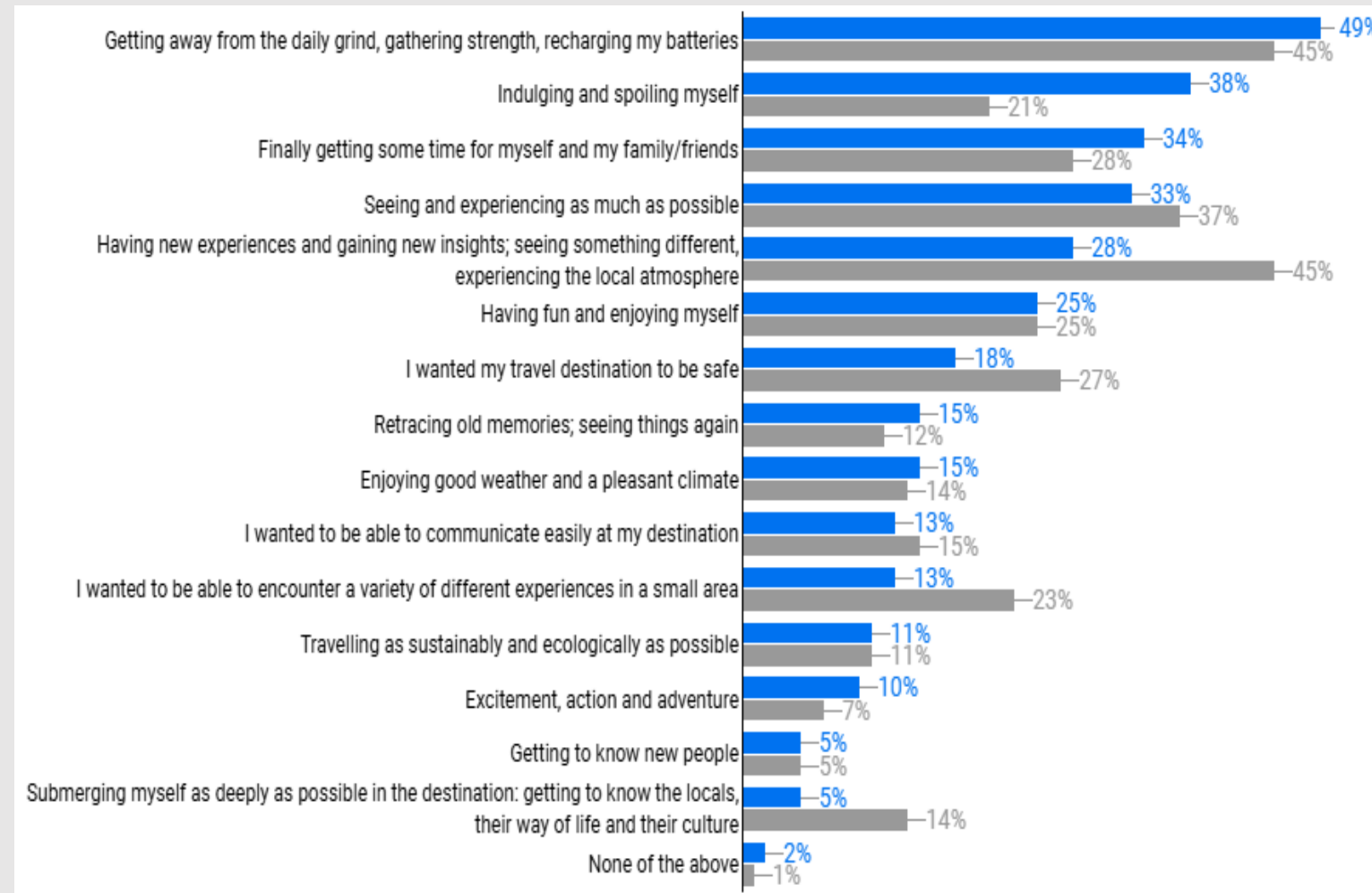


# Key travel motivations

## Inbound leisure visitors with overnight, 2023

Belgium

All inbound

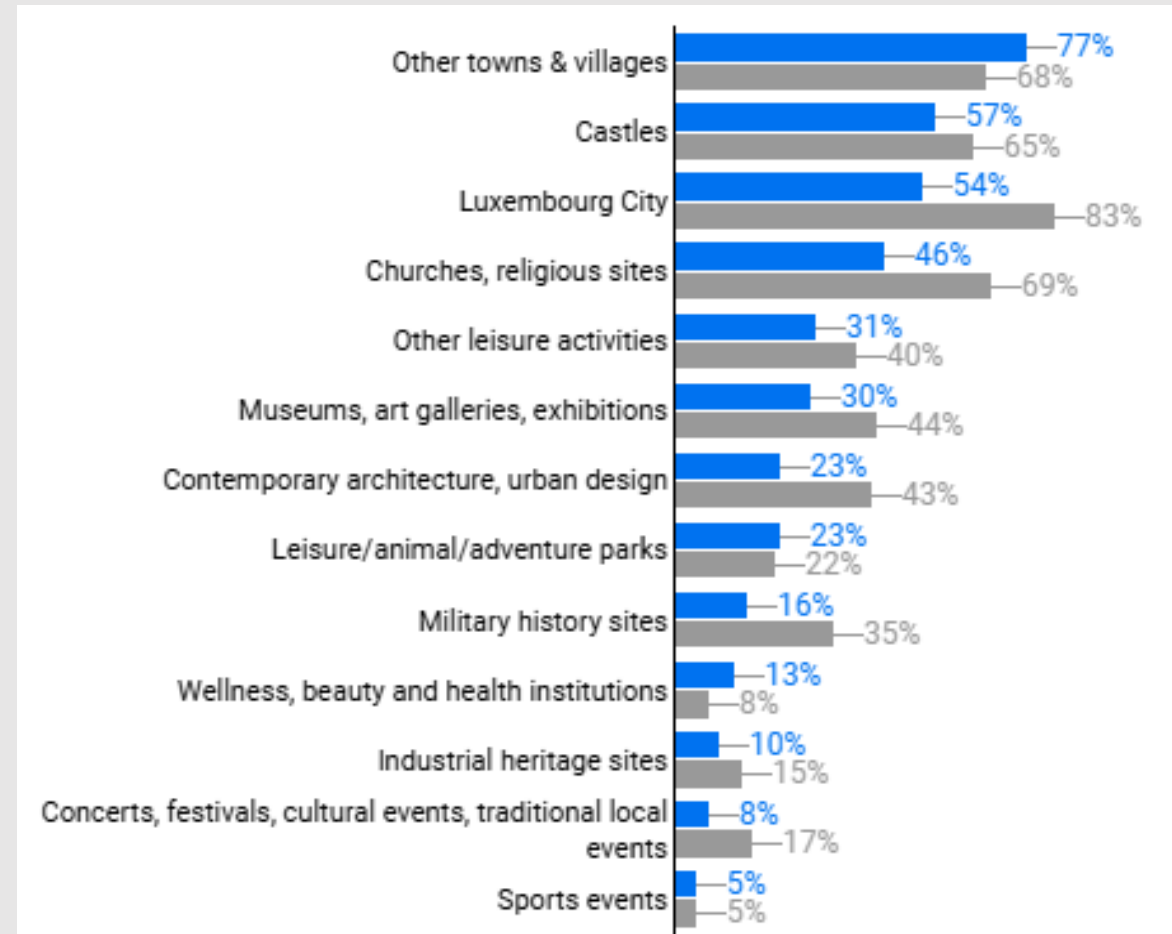




# Type of places visited in Luxembourg

## Inbound leisure visitors with overnight, 2023

Belgium All inbound

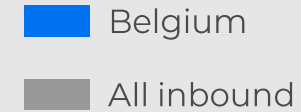


# Activities undertaken in Luxembourg

## Inbound leisure visitors with overnight, 2023



### Non-sporting activities



### Sporting activities





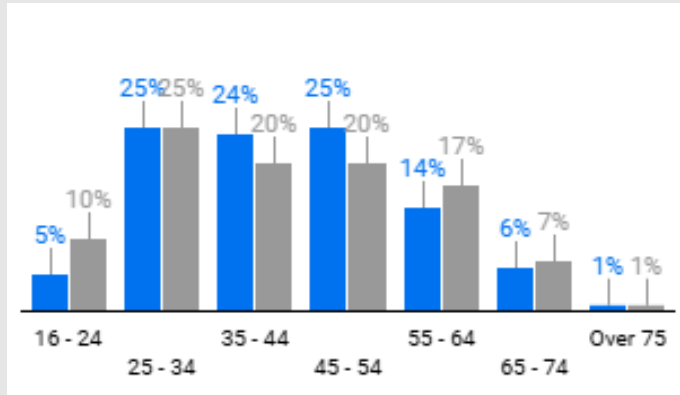
# Transport, travel party, age, repeat visits and cross-border trips

## Inbound leisure visitors with overnight, 2023

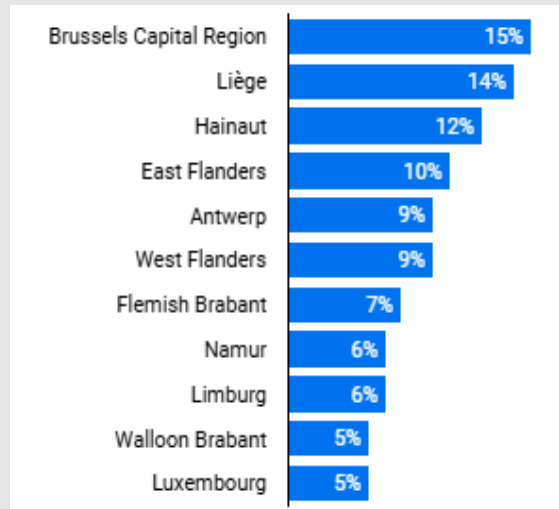


Belgium All inbound

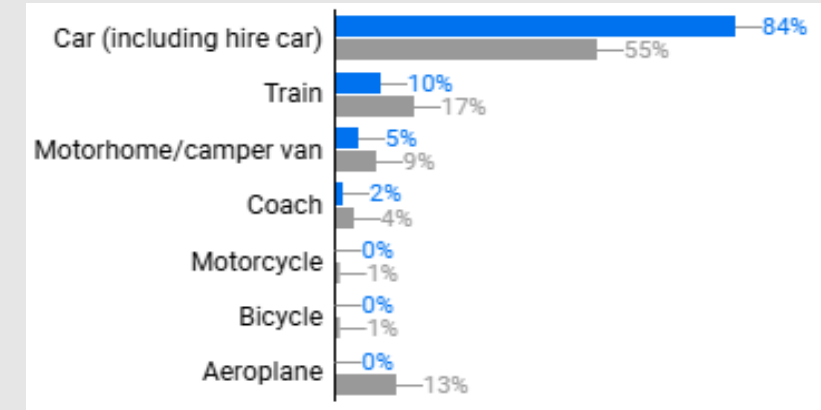
### Age groups



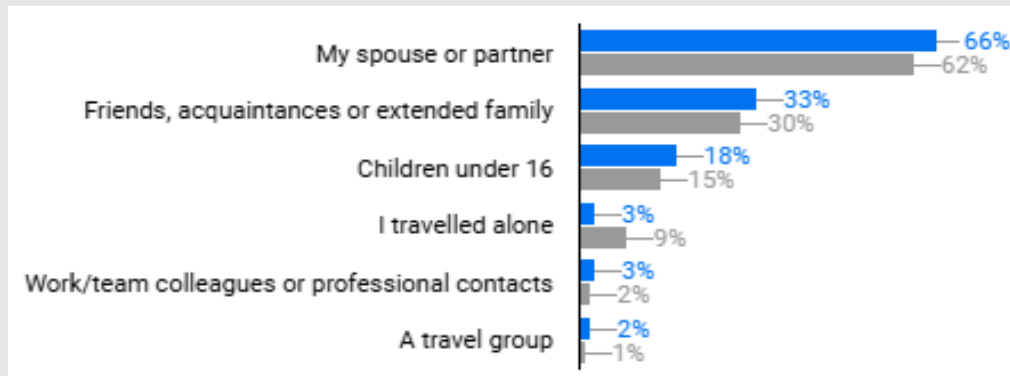
### Region of origin



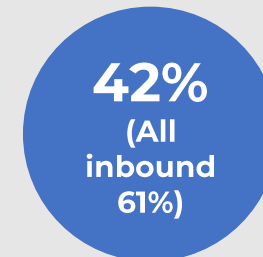
### Mode of transport to access Luxembourg



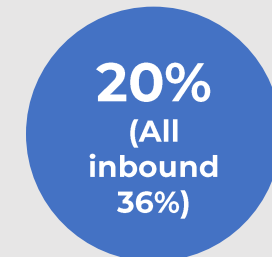
### Travel party



### First-time visitors



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

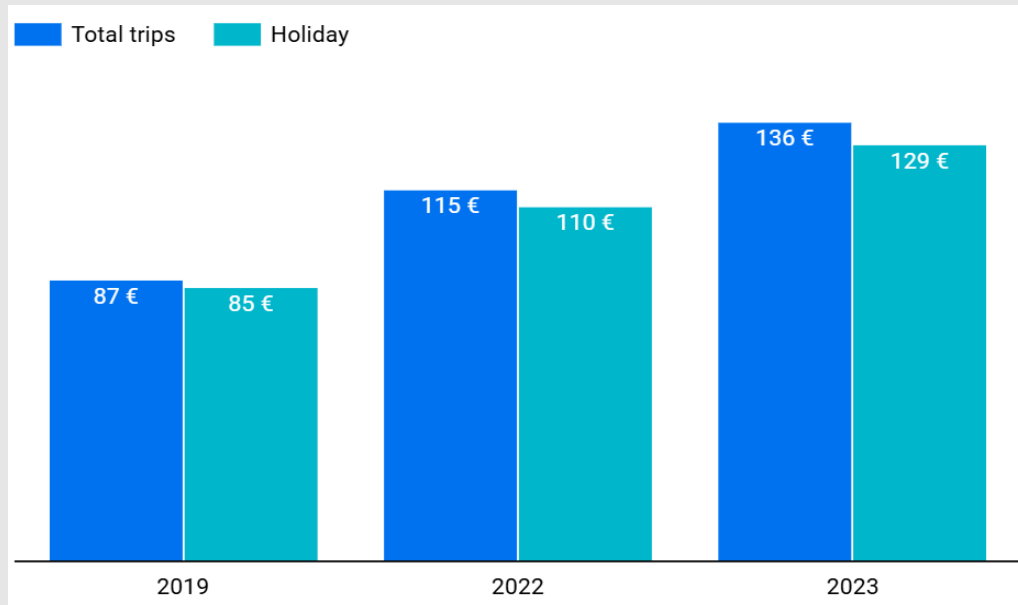


# Expenditure

## Inbound trips to Luxembourg with overnight



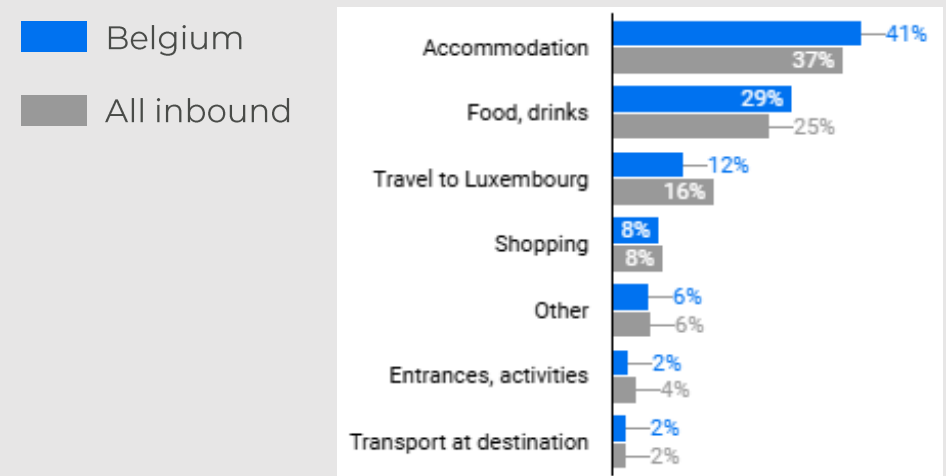
### Belgian trips to Luxembourg : average spend per pers. per day



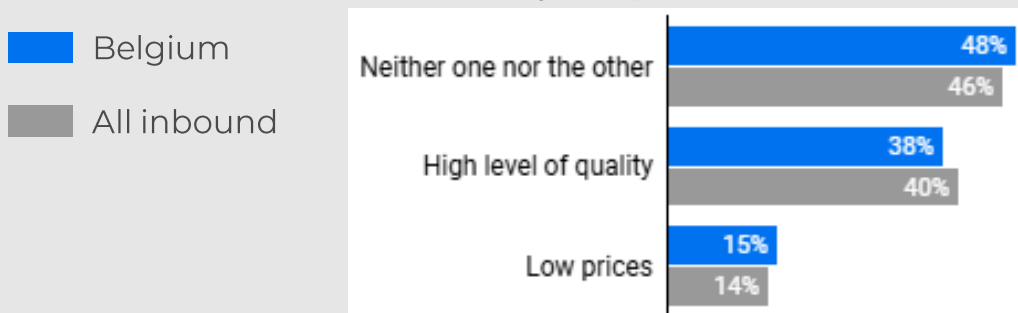
### 2023

	Belgium to Luxembourg	Europe to Luxembourg
Spend/day/pers. on <b>all</b> trips	136 €	152 €
Spend/day/pers. on <b>holiday</b> trips	129 €	144 €

### Expenditure of leisure inbound overnight visitors by categories, 2023



### Quality vs. price orientation

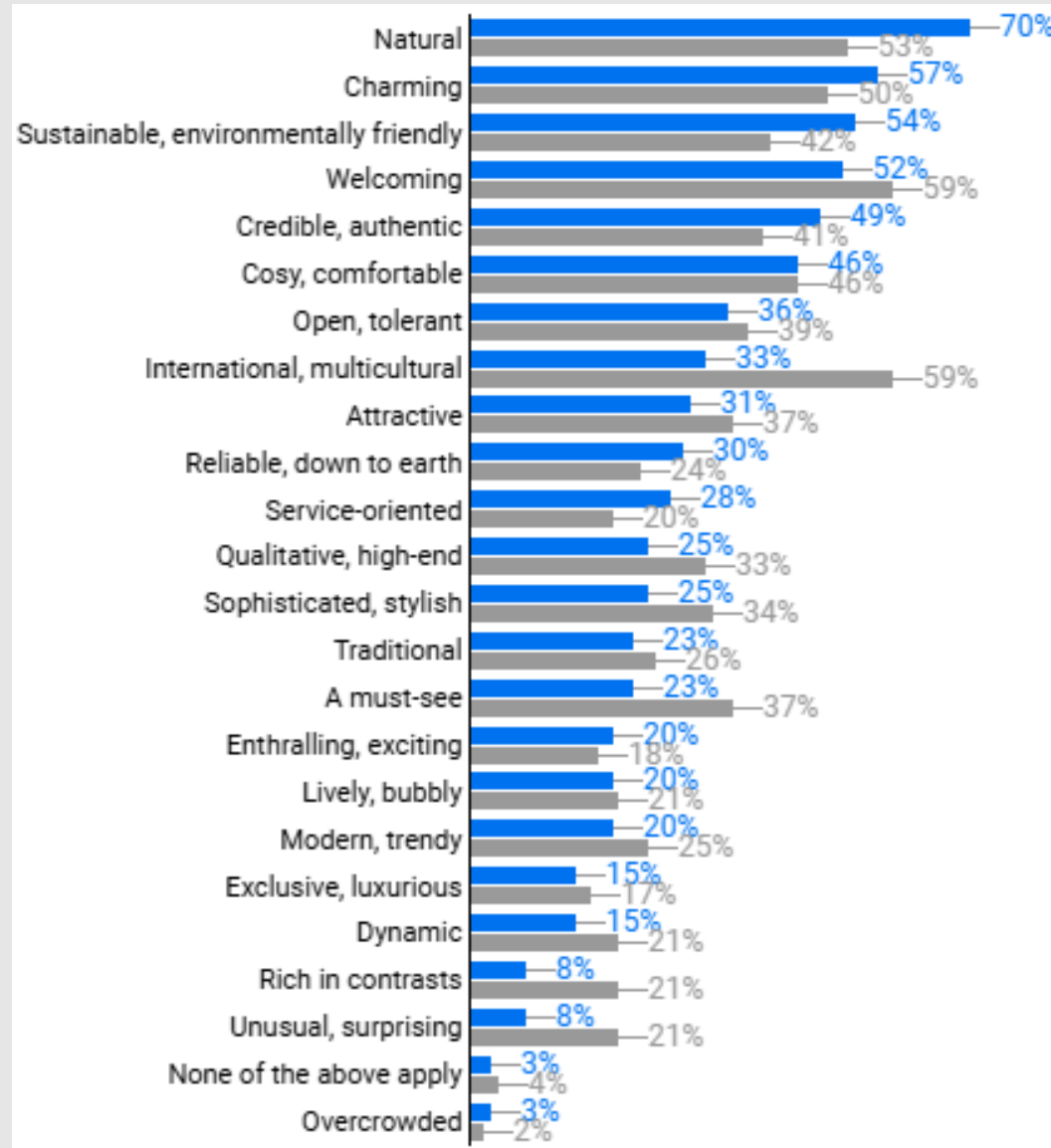


# Image perception of Luxembourg

## Inbound leisure visitors with overnight, 2023

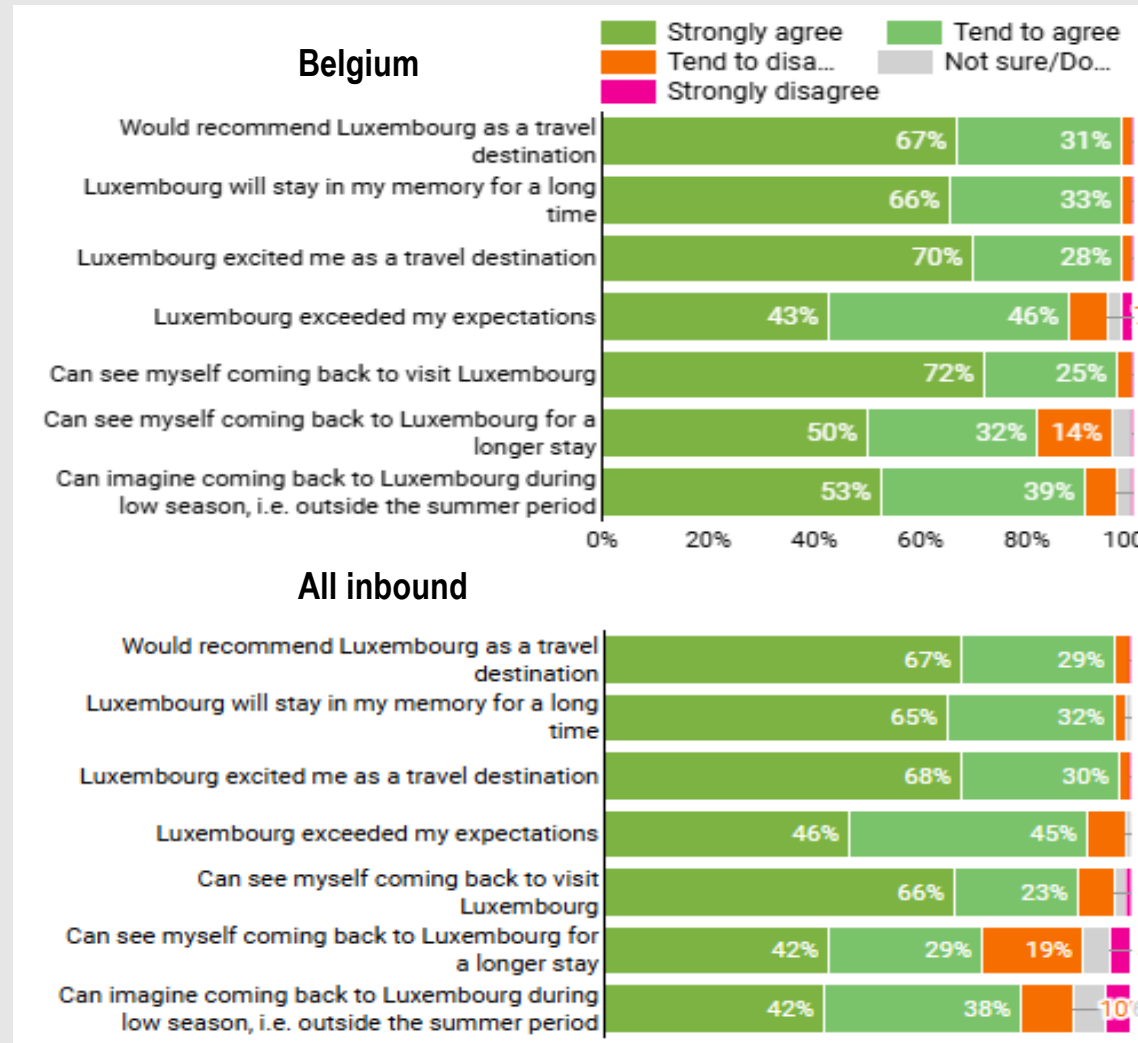


■ Belgium  
■ All inbound



# Visitor satisfaction and recommendation

## Inbound leisure visitors with overnight, 2023



# LFT Target Segments



**Explorers**



**Nature-Loving Actives**



**Relaxation Seekers**



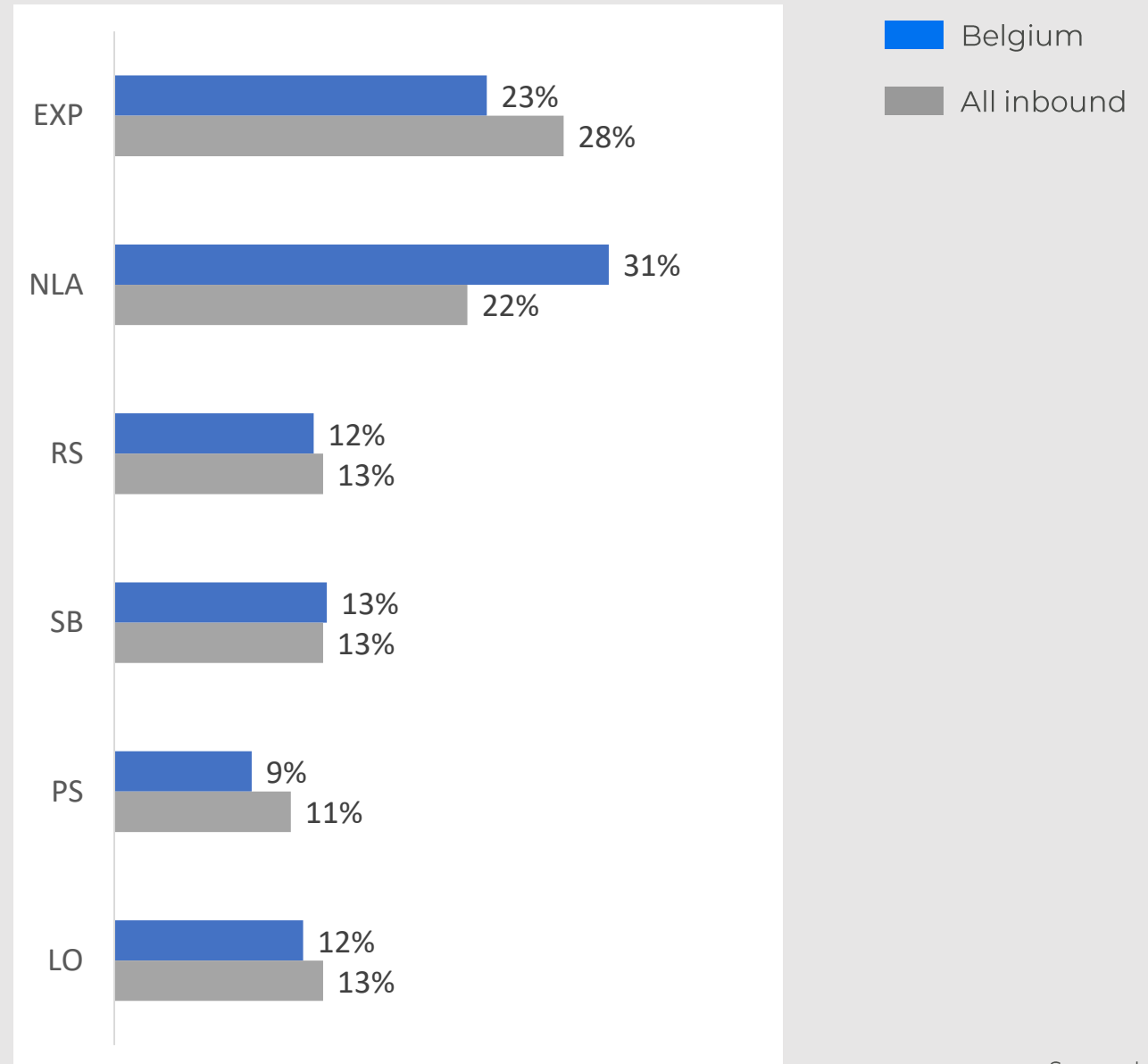
**Short Breakers**



**Perfection Seekers**



**Leisure-Oriented**



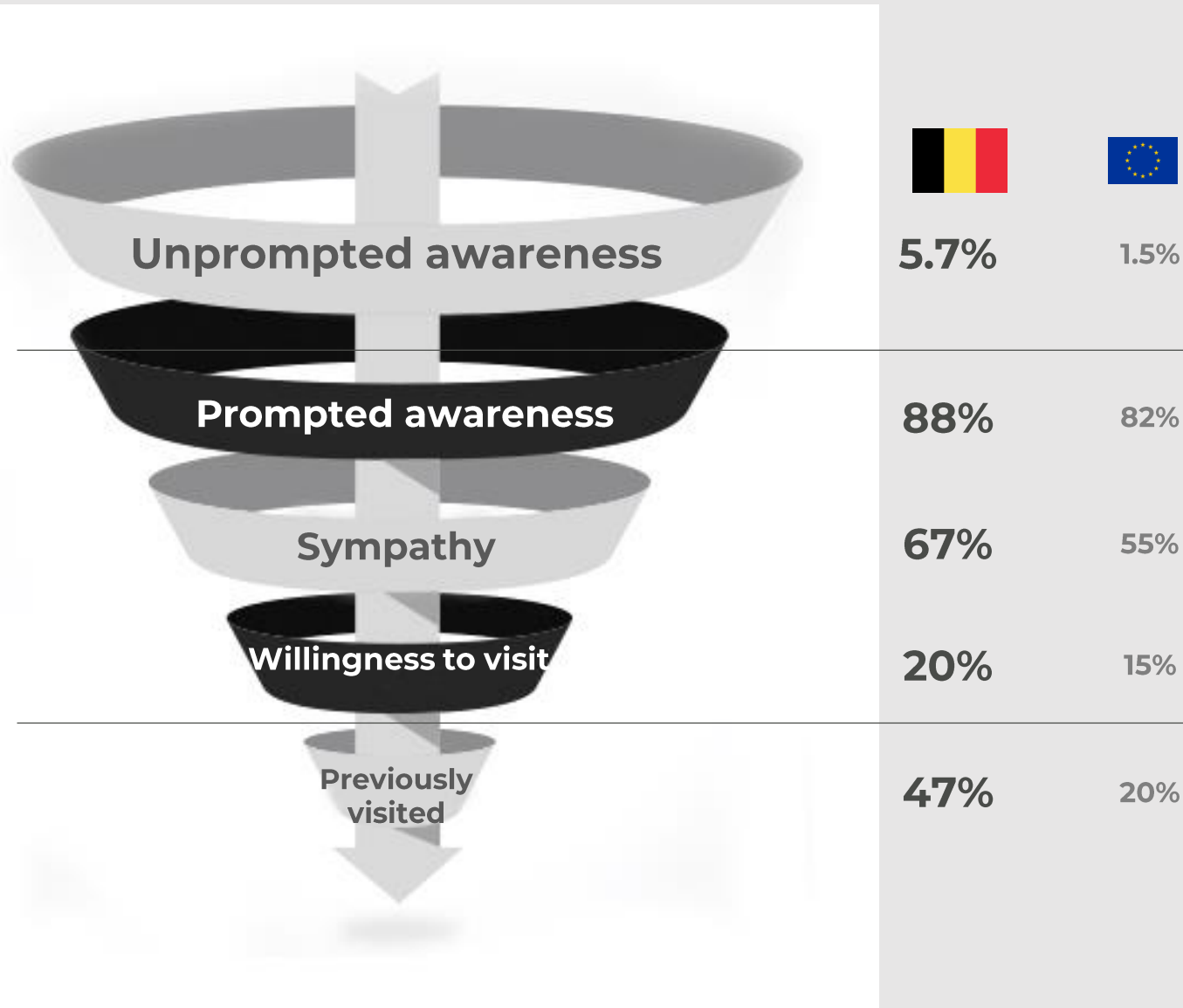




# **Brand strength & Growth potential**

# Brand Funnel 2024

Assessing Luxembourg's brand strength as a destination

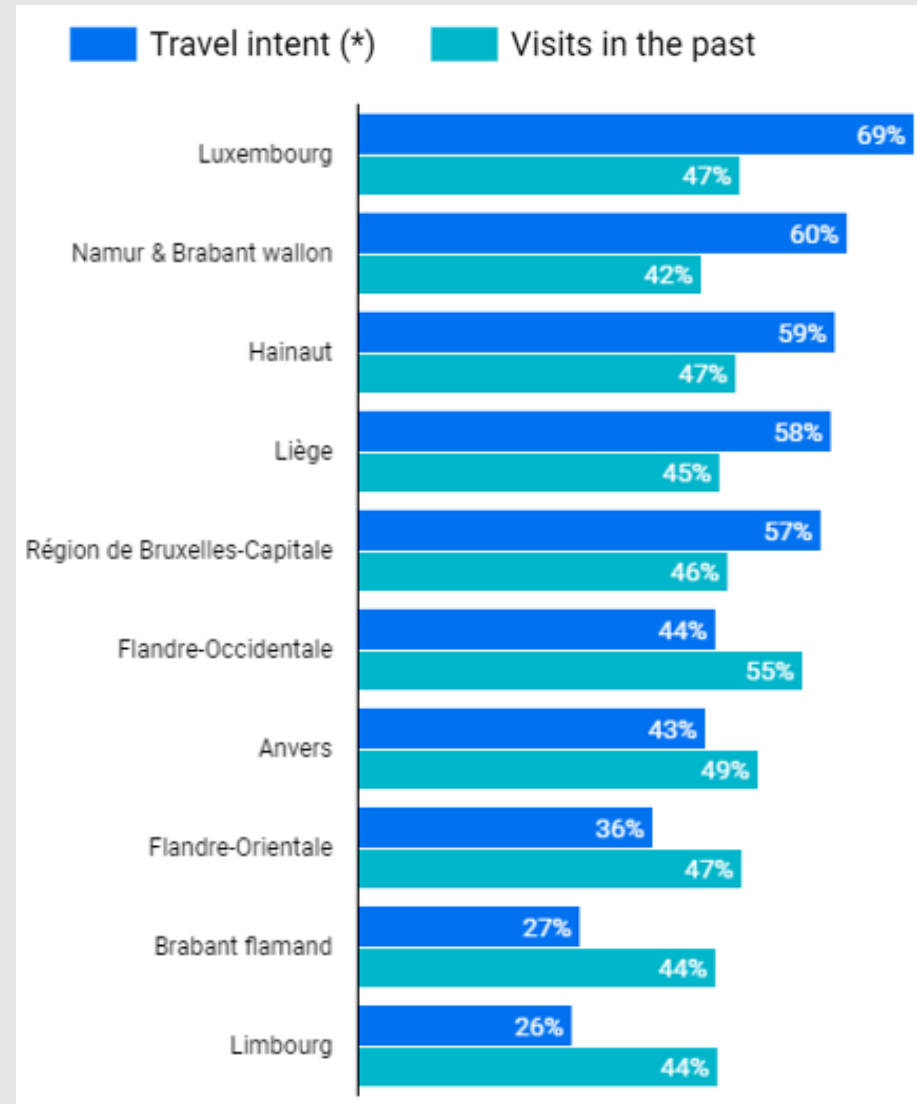


**Core future visitor potential from Belgium (\*)**  
1.6 million

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	73%
Resting/Relaxation	1	2	73%
Culinary	2	3	71%
Sightseeing	4	4	68%
Family	12	5	66%
Fun/entertainment	8	6	64%
Architecture/townscapes	7	7	64%
Immersive travel	6	8	64%
City	5	9	62%
Hiking	17	10	60%
Learning/new skills	14	11	57%
History/Unesco	10	12	57%
Castles	9	13	56%
Exchanging with locals	13	14	55%
Culture	11	15	54%
Sustainability	15	16	54%
Events	16	17	50%
Adventure/action	19	18	49%
Shopping	23	19	46%
Countryside	22	20	46%
Wine	21	21	44%
Remembrance	26	22	43%
Travelling by train	18	23	42%
Nightlife (**)	20	24	41%
Cycling	31	25	41%
Active-sports	27	26	40%
Luxury	24	27	40%
Wellness	25	28	38%
Industrial heritage	28	29	37%
Film locations	30	30	37%
Camping	29	31	35%
MTB	32	32	25%
Motorcycling	33	33	22%




(\*) 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	57%
Hiking	11	2	51%
Resting/Relaxation	2	3	39%
Family	8	4	37%
Castles	7	5	36%
Culinary	3	6	34%
City	1	7	31%
Architecture/townscapes	4	8	30%
Cycling	20	9	26%
Shopping	10	10	25%
Culture	6	11	25%
Camping	19	12	25%
Wine	15	13	24%
Countryside	17	14	24%
MTB	25	15	24%
Active-sports	21	16	24%
History/Unesco	12	17	23%
Luxury	9	18	22%
Adventure/action	22	19	21%
Fun/entertainment	13	20	20%
Sustainability	18	21	19%
Wellness	16	22	17%
Remembrance	26	23	14%
Industrial heritage	24	24	14%
Nightlife (***)	14	25	12%
Events	23	26	12%

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

- Resting/relaxation
- Culinary
- City
- Culture & Events
- Architecture/townscapes
- History/Unesco
- Fun/entertainment
- Sustainability
- Nightlife

(\*) 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.



# Luxembourg's Brand Value Ratings (\*)



Feature			
	Rank	Rank	% agreeing
<b>clean</b>	2	<b>1</b>	45%
<b>safe</b>	1	<b>2</b>	42%
<b>welcoming, hospitable</b>	4	<b>3</b>	35%
<b>authentic, real</b>	5	<b>4</b>	34%
<b>of high quality</b>	3	<b>5</b>	31%
<b>attractive, appealing</b>	7	<b>6</b>	28%
<b>open-minded, tolerant, international</b>	6	<b>7</b>	24%
<b>varied, diversified</b>	12	<b>8</b>	22%
<b>surprising</b>	11	<b>8</b>	22%
<b>affordable</b>	16	<b>10</b>	21%
<b>exclusive, luxurious</b>	8	<b>11</b>	21%
<b>service oriented</b>	10	<b>12</b>	20%
<b>not overcrowded / insider tip</b>	14	<b>13</b>	20%
<b>dynamic, modern</b>	9	<b>14</b>	18%
<b>sustainable</b>	15	<b>15</b>	18%
<b>lively, trendy</b>	13	<b>16</b>	15%

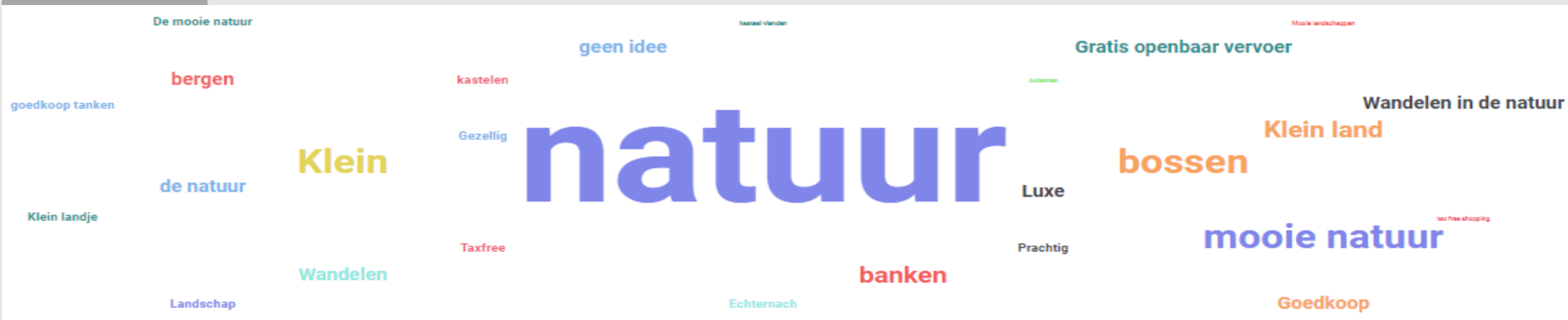
(\*) Brand feature associated with destination Luxembourg, % of respondents agreeing.

Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-IE-DK-SE-PT.

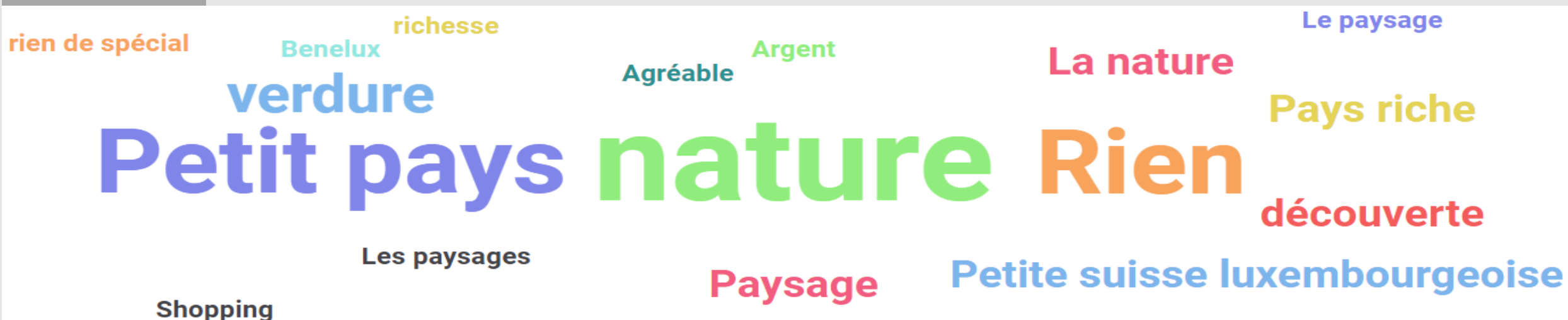
# Spontaneous associations with Luxembourg



## Vlaanderen



## Wallonie





## Your contact



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