



Luxembourg for Tourism

# **Market profile**

# **BELGIUM**

## **2024**

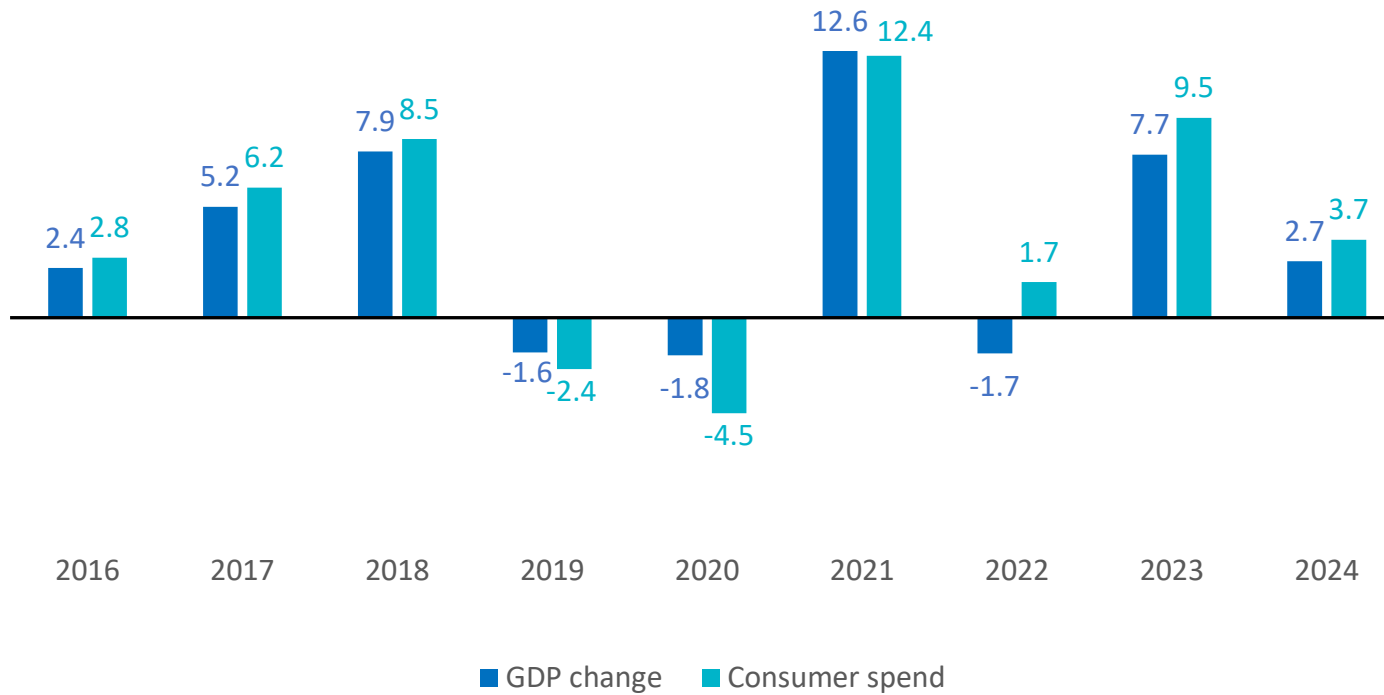


# **Economic indicators & General Travel Demand**

# Economic indicators – General travel demand



## GDP and consumer spending, % annual change



## Economy & population

**GDP (\$) per capita**  
56,141.45

**Unemployment (%)**  
5.70

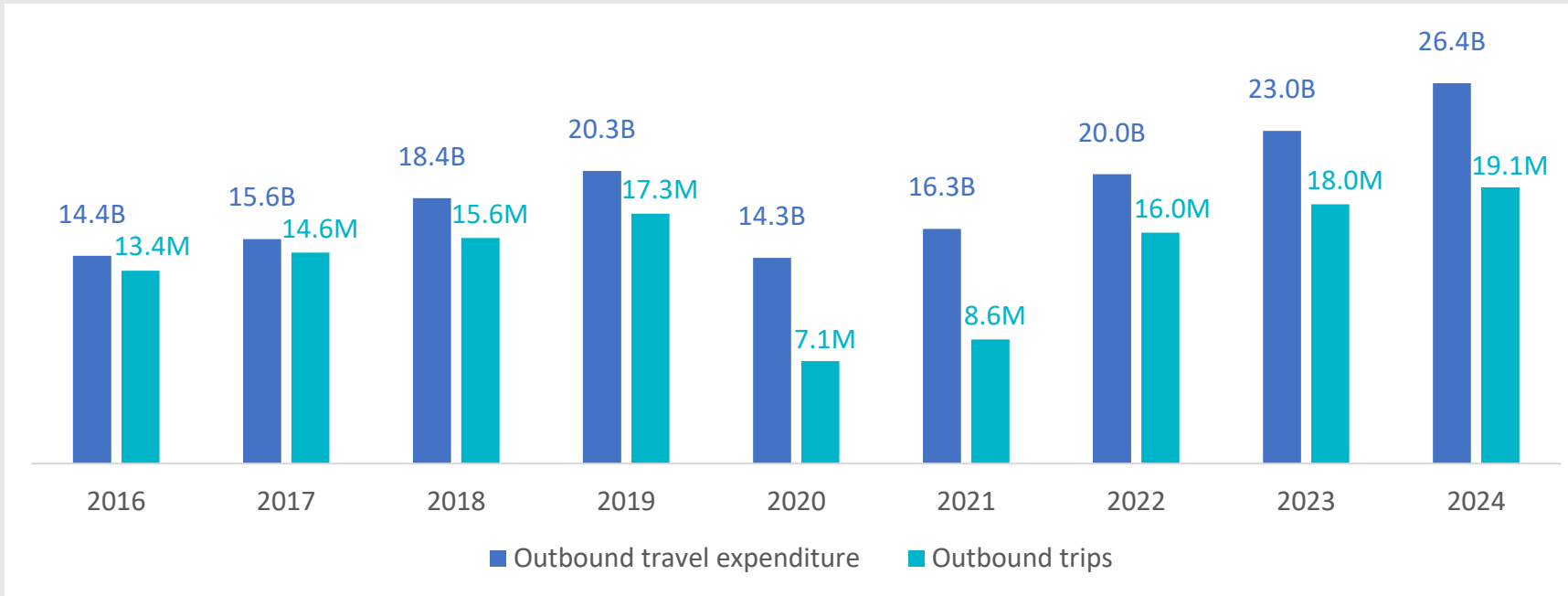
**Inflation(%)**  
3.14

**Population**  
11,835,860

# Economic indicators – General travel demand



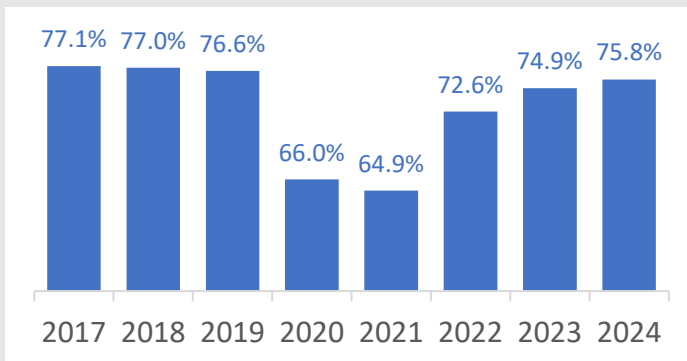
## Outbound trips and travel expenditure



**Outbound travel intensity**  
**1.62 trips**  
**per inhabitant (2024)**

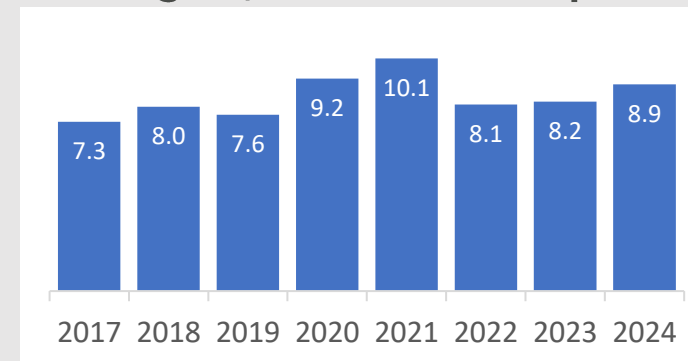
**Average spend**  
**per outbound trip (2024)**  
**1,377 \$**

## Share of outbound travel, % all nights



**Share of leisure,**  
**% all outbound trips**  
**(2024)**  
**86.8%**

## Average length of stay, nights, all outbound trips



**Share of short trips**  
**(1-3 nights),**  
**% all outbound**  
**trips (2024)**  
**29.0%**



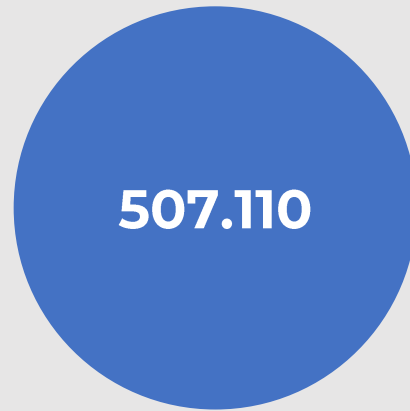
# **Arrivals & nights in paid accommodation**

# Nights in paid accommodation

## 2024 and 2018-2024

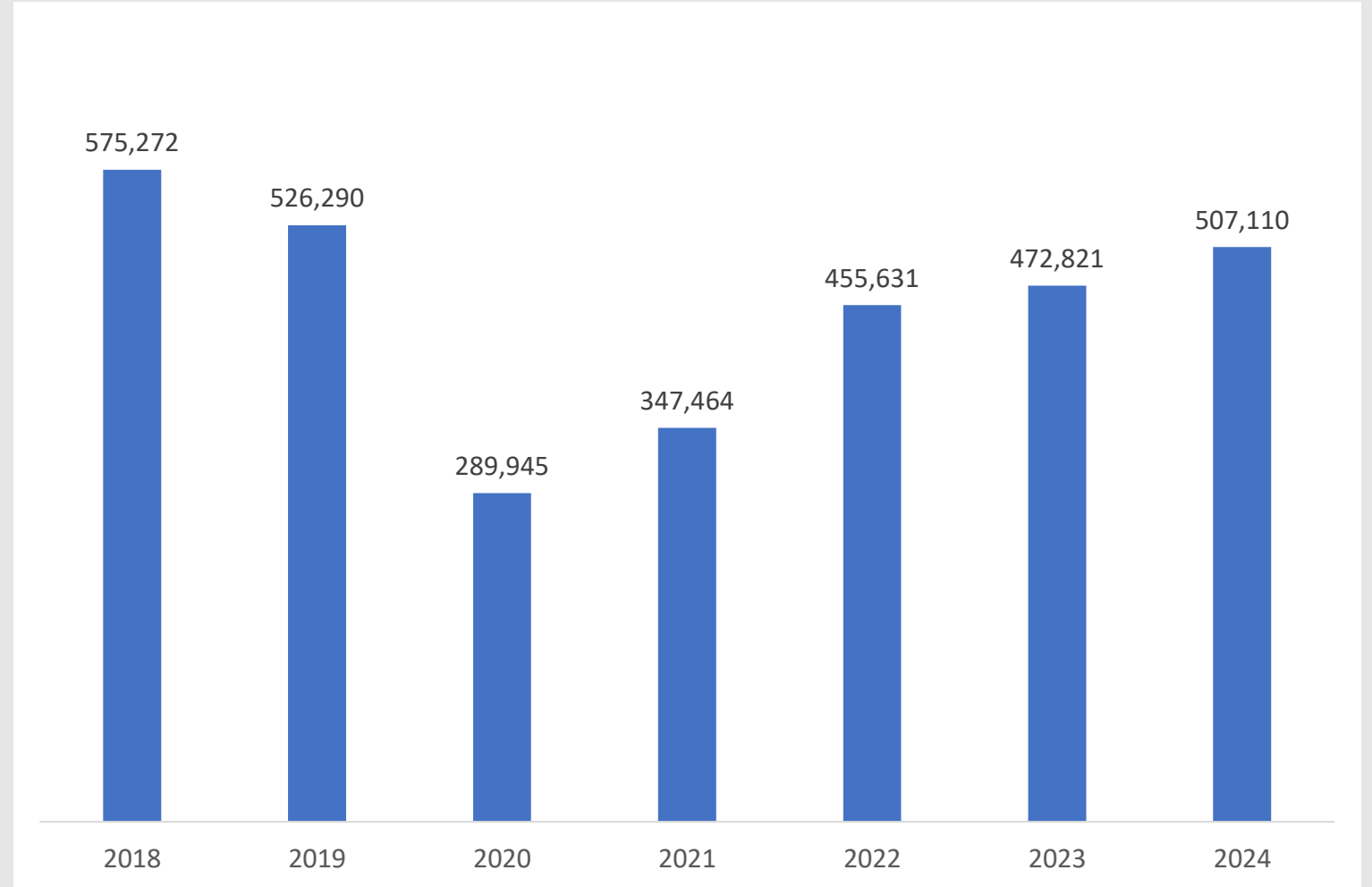


Nights,  
paid accommodation, 2024



+7% (vs. 2023)

-4% (vs. 2019)



# Arrivals in paid accommodation

## 2024 and 2018-2024

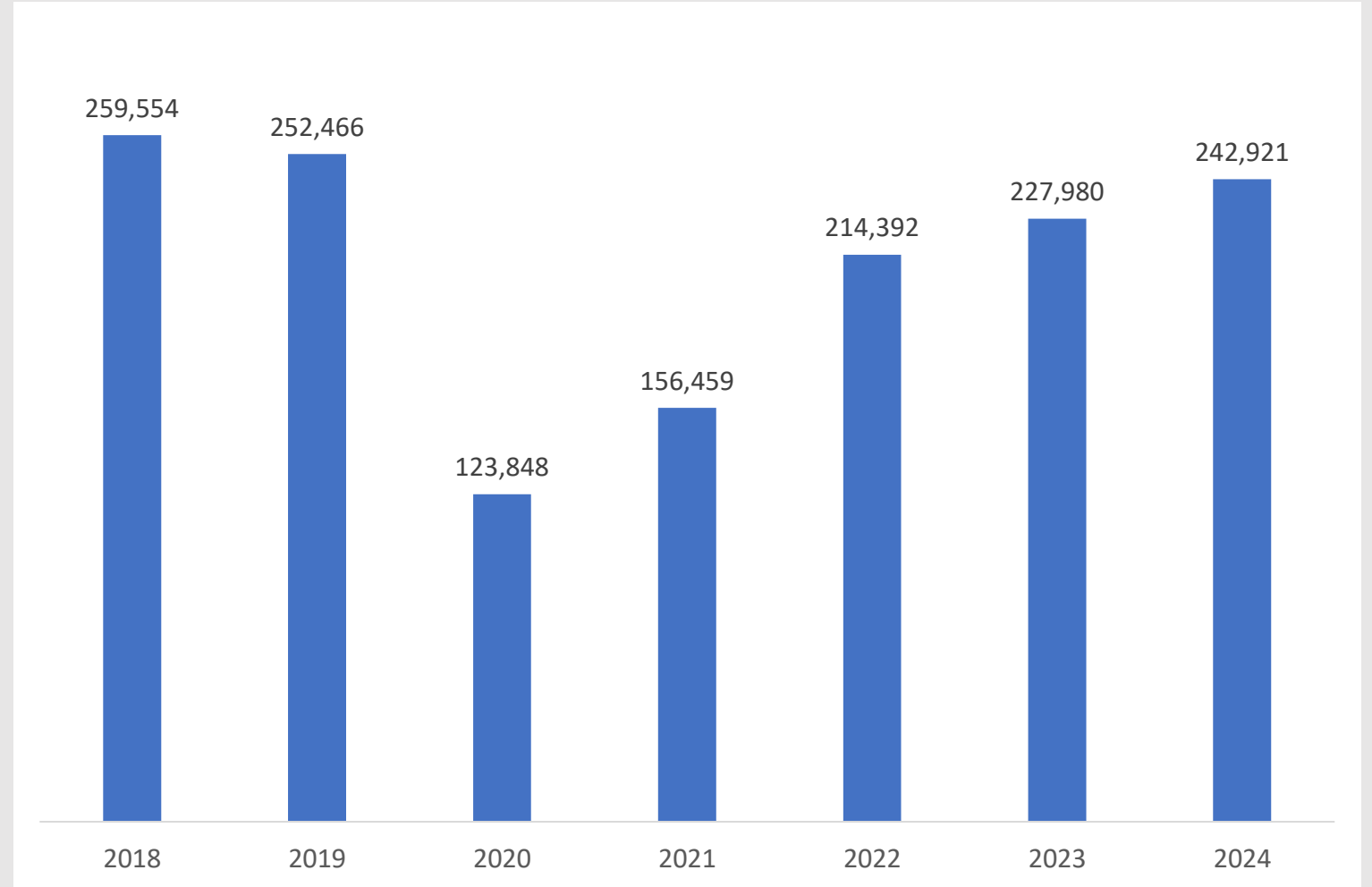


**Arrivals,  
paid accommodation, 2024**



**+7% (vs. 2023)**

**-4% (vs. 2019)**



# Length of stay, paid accommodation

## 2024 and 2018-2024

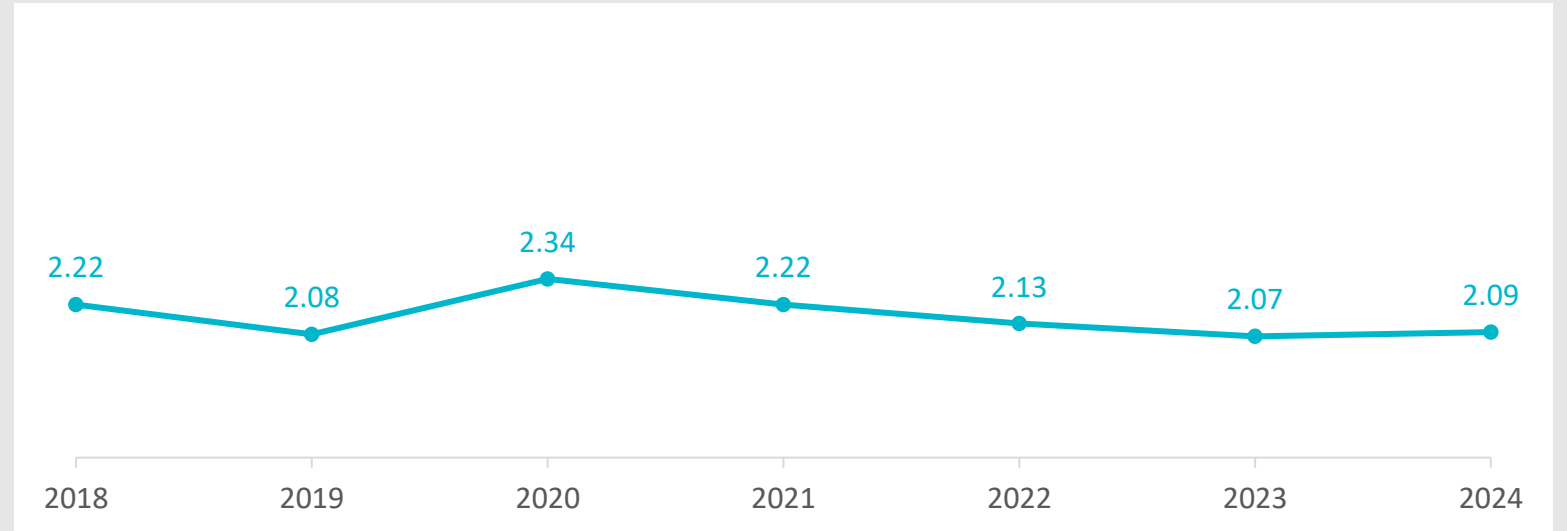


Average length of stay,  
paid accommodation, 2024



+0.02 nights (vs. 2023)

+0.01 nights (vs. 2019)

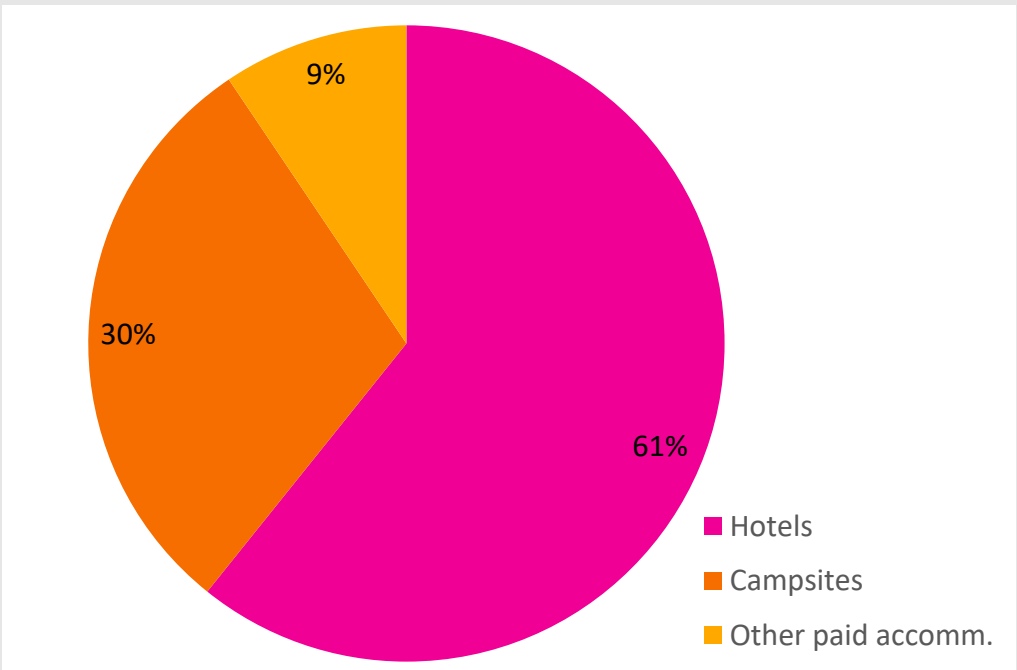


# Nights & arrivals in paid accommodation

## Type of accommodation, 2024

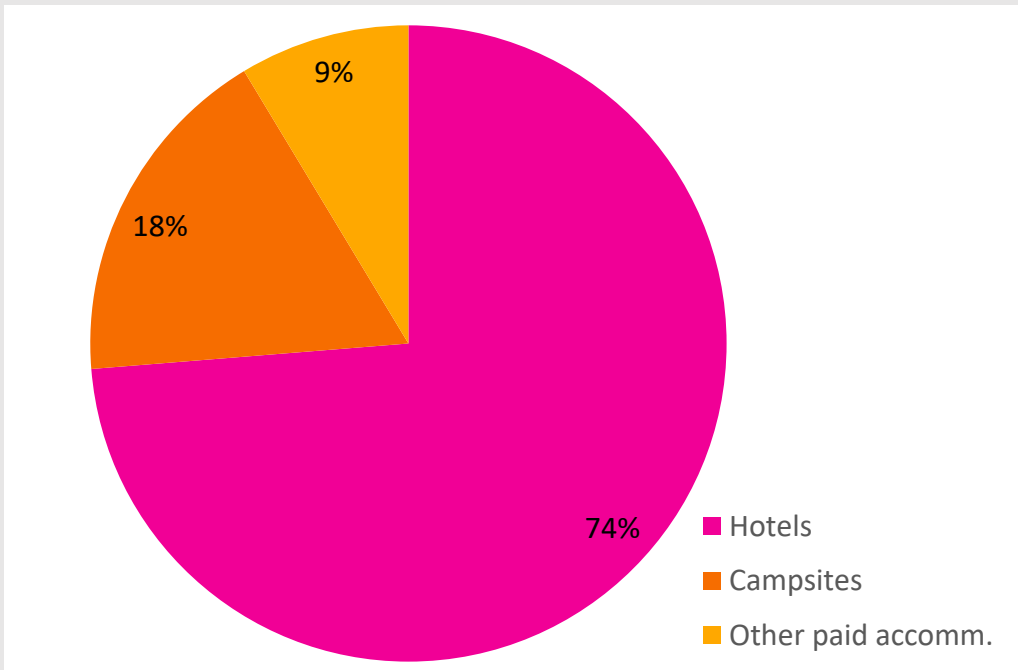


**Nights,  
paid accommodation, 2024**



Hotels	308.142	+10% (vs. 2023)	-12% (vs. 2019)
Campsites	151.165	+3% (vs. 2023)	+16% (vs. 2019)
Other paid accomm.	47.803	+3% (vs. 2023)	+8% (vs. 2019)

**Arrivals,  
paid accommodation, 2024**



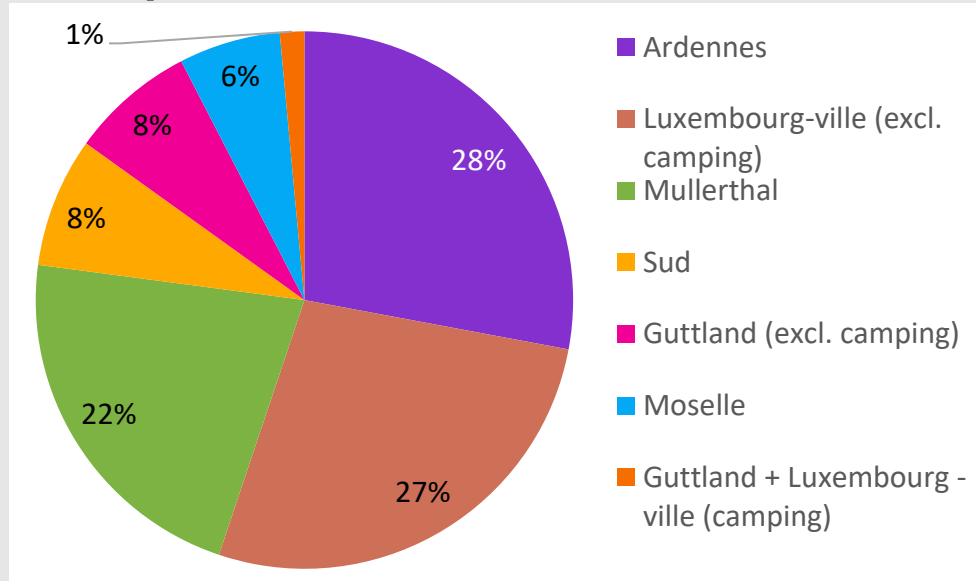
Hotels	179.089	+5% (vs. 2023)	-13% (vs. 2019)
Campsites	42.843	+17% (vs. 2023)	+51% (vs. 2019)
Other paid accomm.	20.989	+2% (vs. 2023)	+18% (vs. 2019)

# Nights & arrivals in paid accommodation

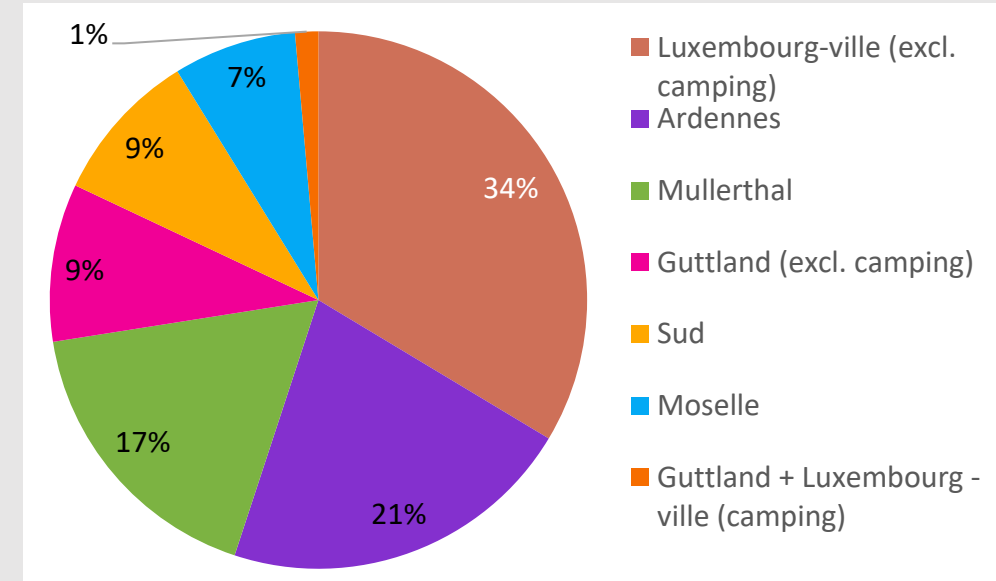
## Regions, 2024



### Nights, paid accommodation, 2024



### Arrivals, paid accommodation, 2024



Eislek	141.689	-7% (vs. 2023)	-10% (vs. 2019)
Lux.-City (excl. camping)	138.013	+16% (vs. 2023)	-12% (vs. 2019)
MPSL	111.246	+14% (vs. 2023)	+23% (vs. 2019)
South	39.638	+8% (vs. 2023)	+11% (vs. 2019)
Guttland (excl. camping)	38.082	+32% (vs. 2023)	-5% (vs. 2019)
Moselle	30.996	-1% (vs. 2023)	-21% (vs. 2019)
Guttland/Lux.-City (camping)	7.446	+8% (vs. 2023)	-1% (vs. 2019)

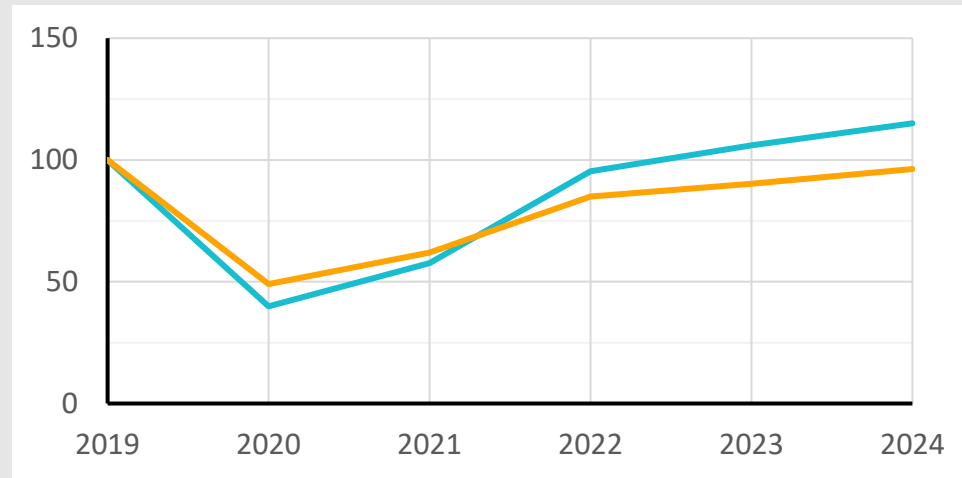
Lux.-City (excl. camping)	81.653	+8% (vs. 2023)	-13% (vs. 2019)
Eislek	52.076	-3% (vs. 2023)	-12% (vs. 2019)
MPSL	42.418	+13% (vs. 2023)	+39% (vs. 2019)
Guttland (excl. camping)	23.076	+19% (vs. 2023)	-3% (vs. 2019)
South	22.332	+5% (vs. 2023)	+7% (vs. 2019)
Moselle	17.976	+3% (vs. 2023)	-15% (vs. 2019)
Guttland/Lux.-City (camping)	3.390	+11% (vs. 2023)	+10% (vs. 2019)

# Arrivals in paid accommodation

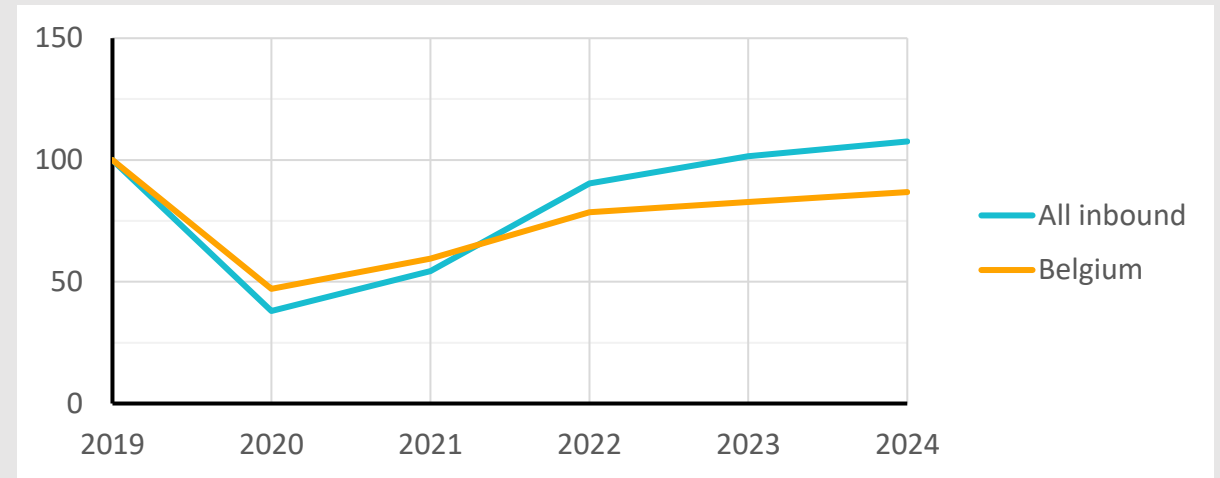
## Trends 2019-2024



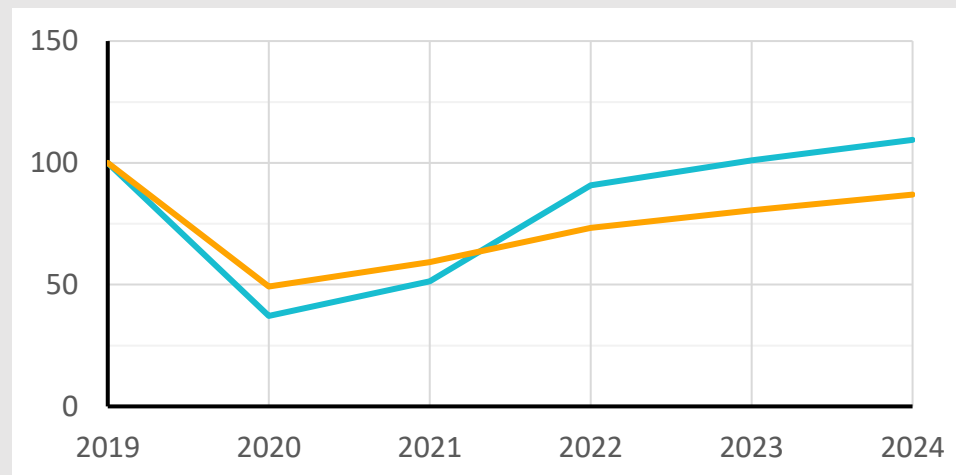
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



All paid accommodation (\*), Luxembourg City (2019 = Index 100)

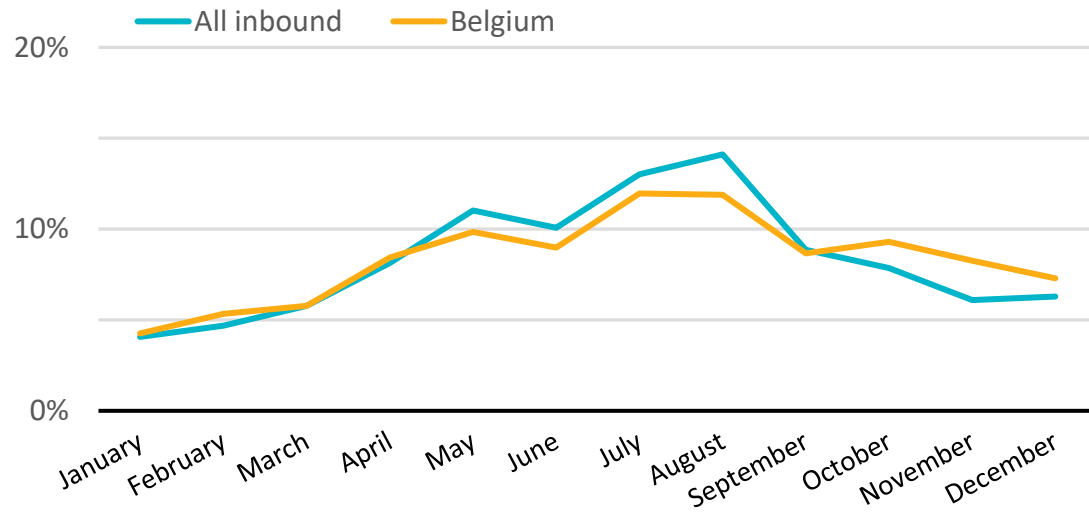


# Arrivals in paid accommodation

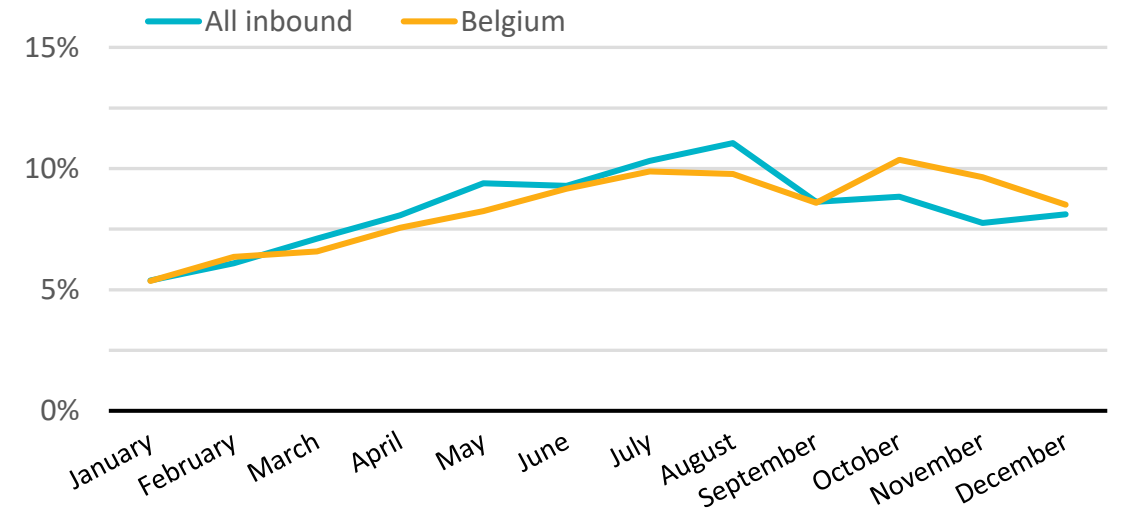
## Seasonality



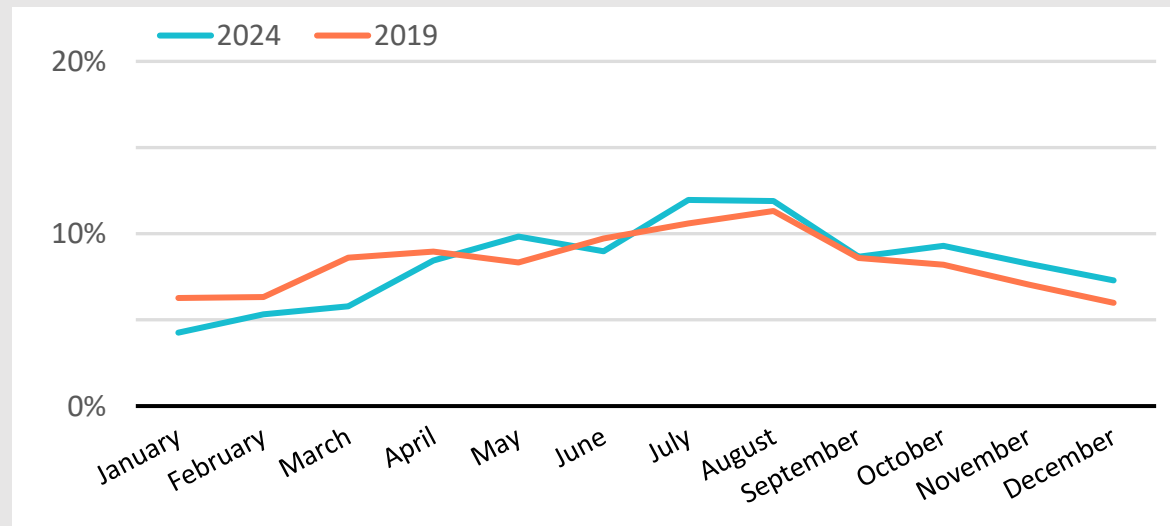
### All paid accommodation, 2024



### Hotels, 2024



### All paid accommodation, arrivals from Belgium

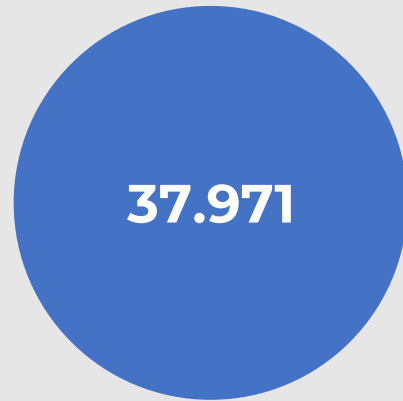


# Short-term rentals

## 2024 and 2018-2024



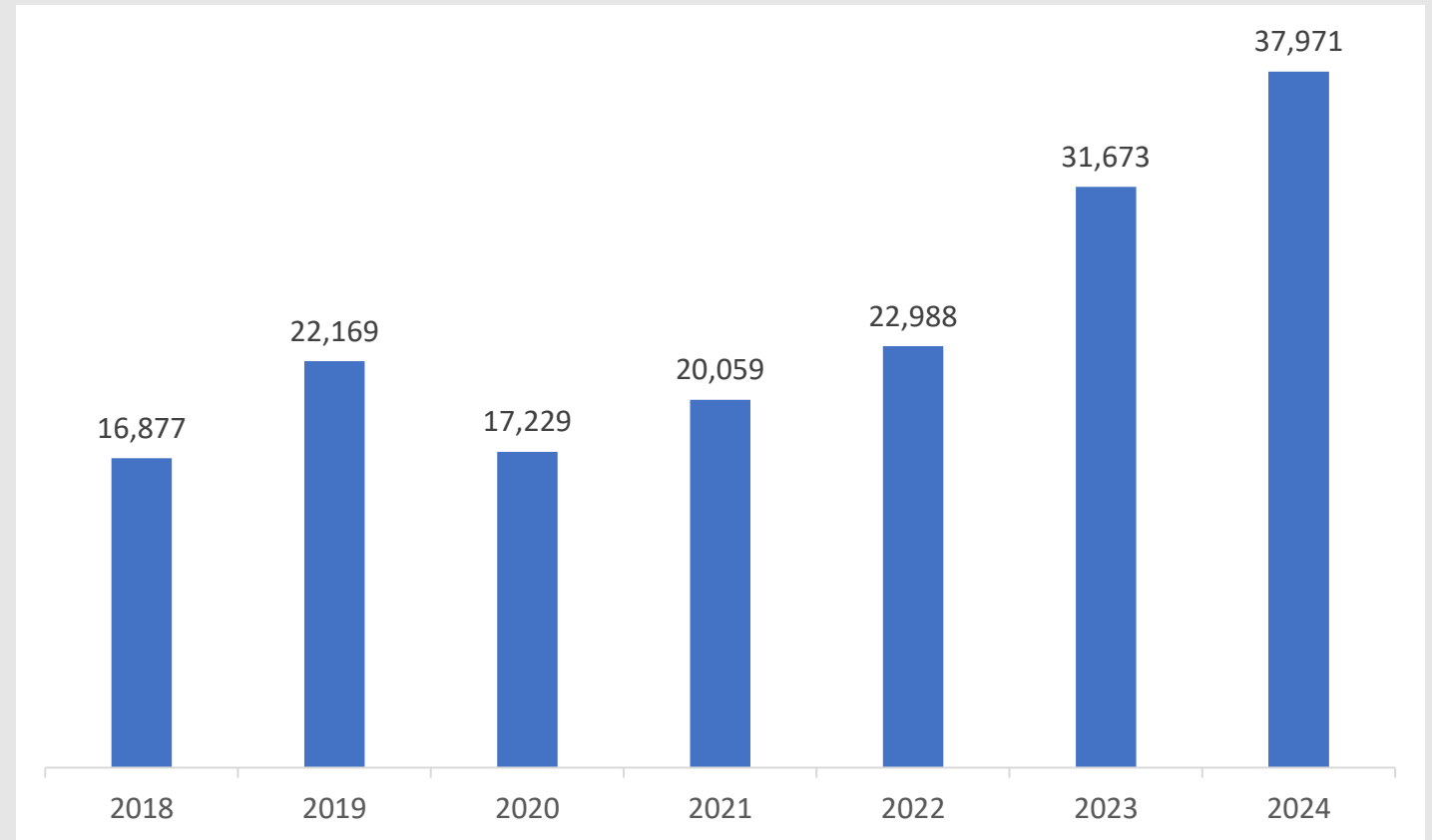
Nights,  
Short-term rentals, 2024



20% (vs. 2023)

71% (vs. 2019)

Nights,  
Short-term rentals, 2018-2024





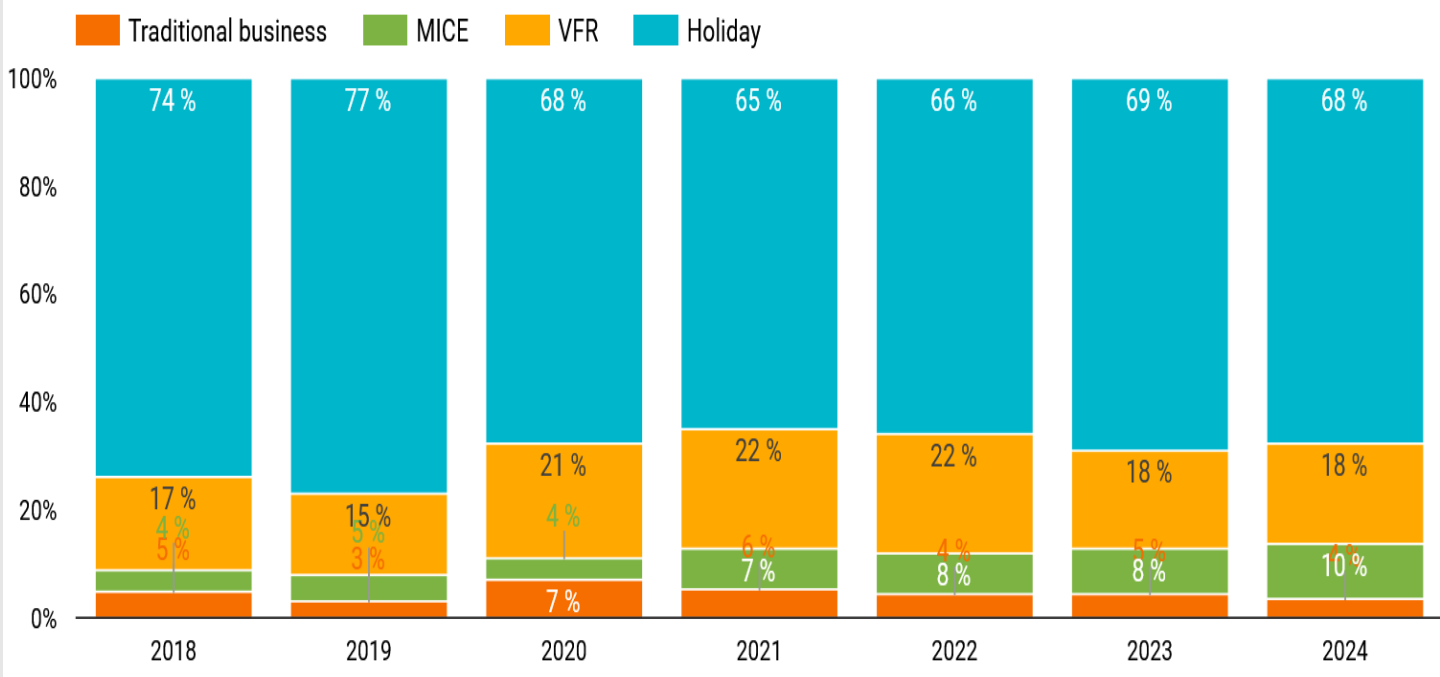
# **Characteristics of inbound trips**

# Belgian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2018-2024

Belgian trips to Luxembourg, 2018-2024



2024

Belgium to Luxembourg Europe to Luxembourg

Holiday	68%	61%
VFR	18%	15%
MICE	10%	15%
Traditional Business	4%	8%

# Inbound same-day trips to Luxembourg

## 2024



Number of inbound  
same-day trips, 2024 (estimate)



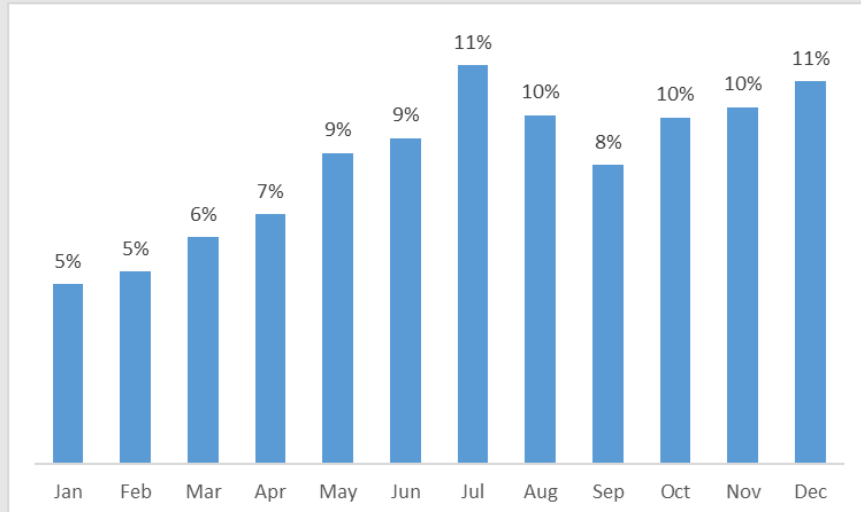
-6% (vs. 2023)

Average length  
of same-day trips



-0,2 h (vs. 2023)

Seasonality  
% of same-day trips



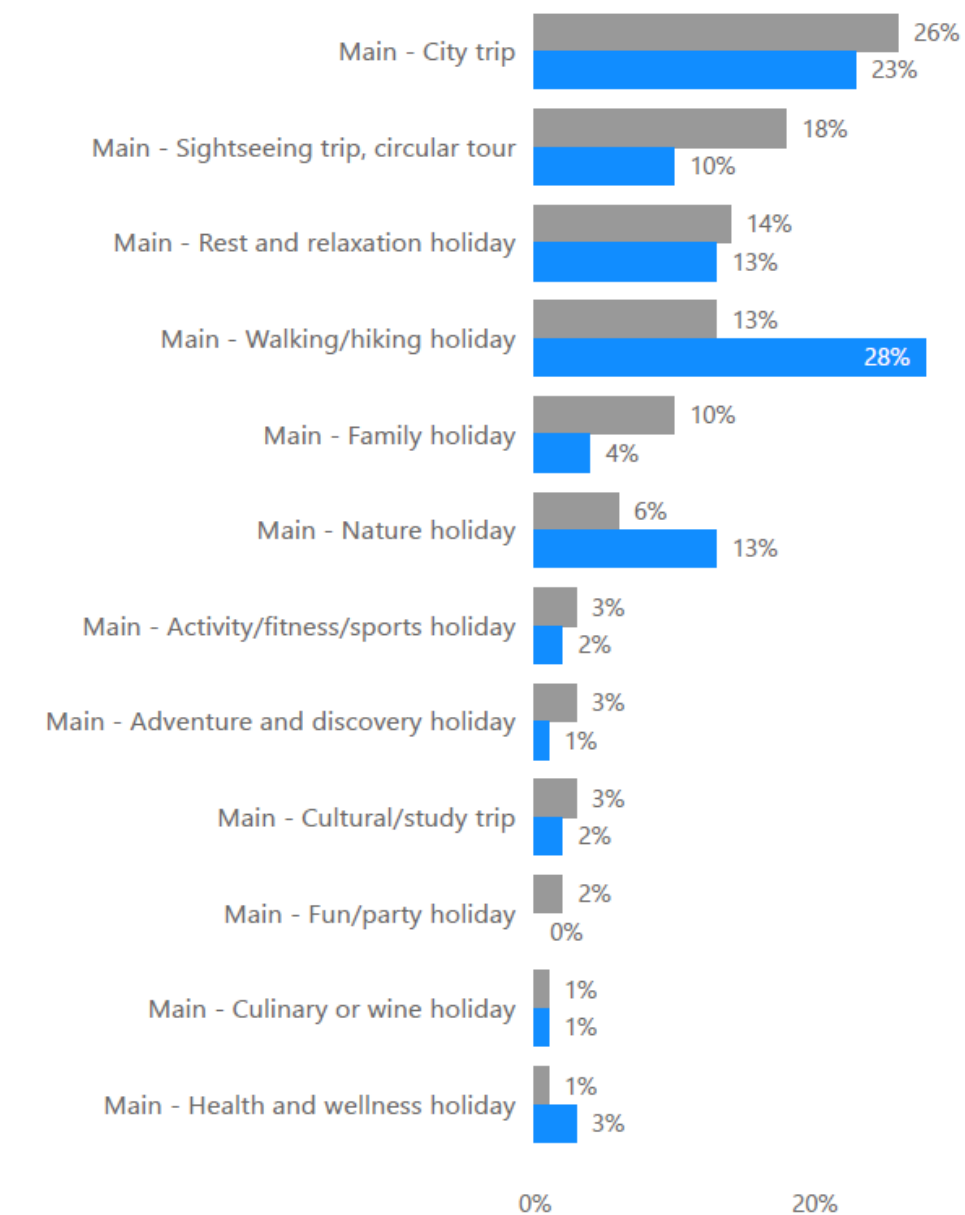


# **Travel behaviour of inbound leisure visitors**

## Main holiday types

### Visitors with overnight

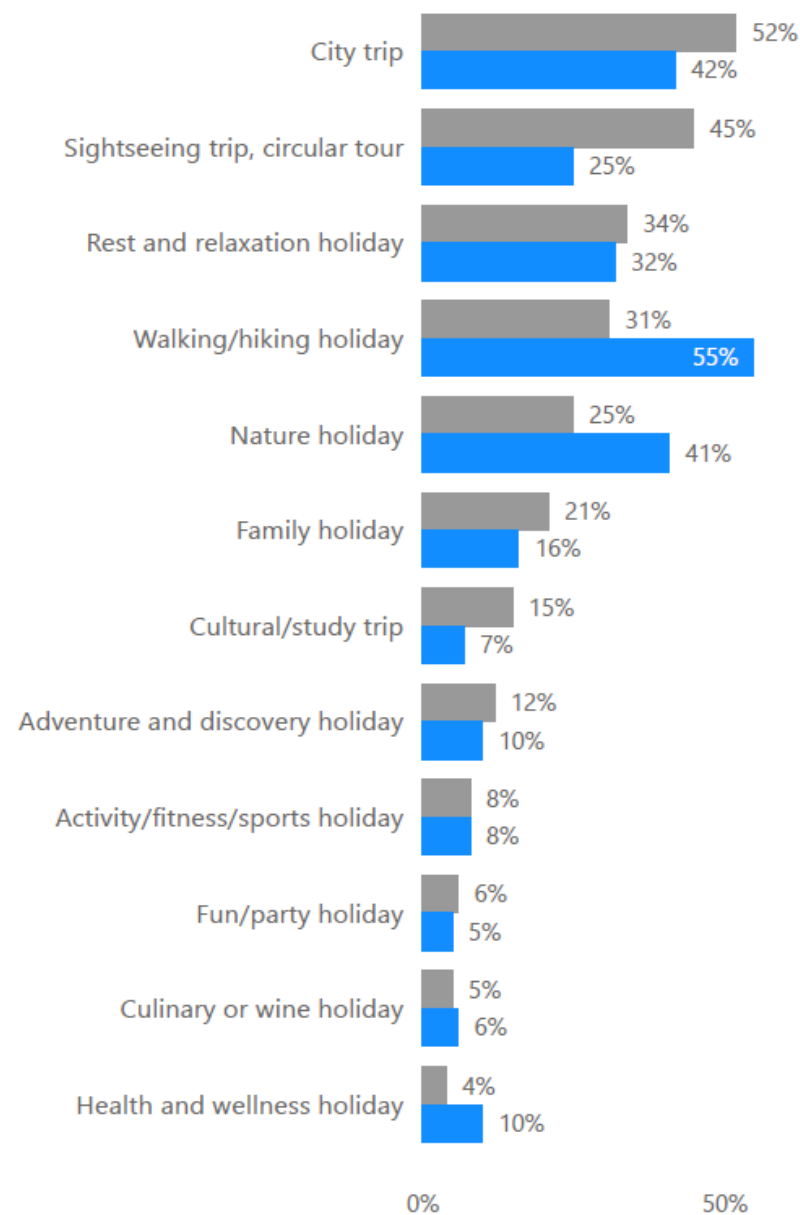
● All Inbound ● Belgium



## All holiday types

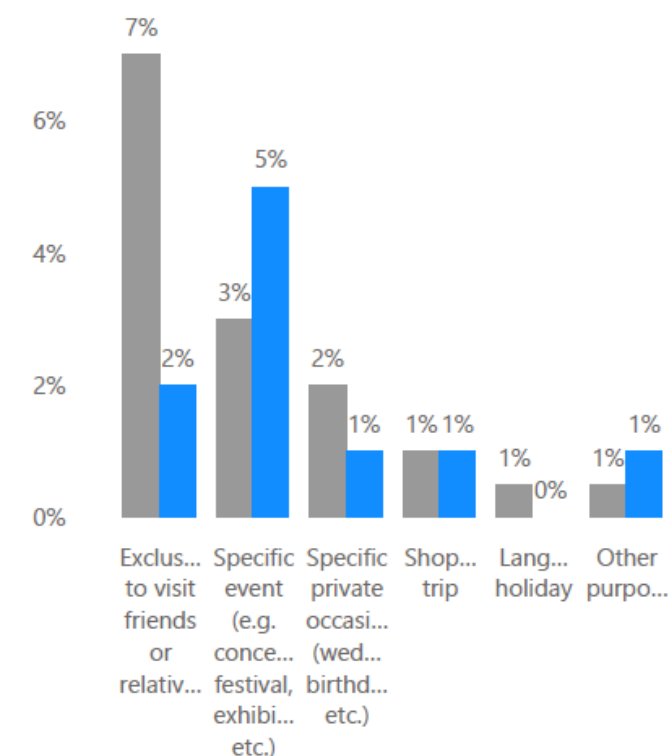
### Visitors with overnight

● All Inbound ● Belgium



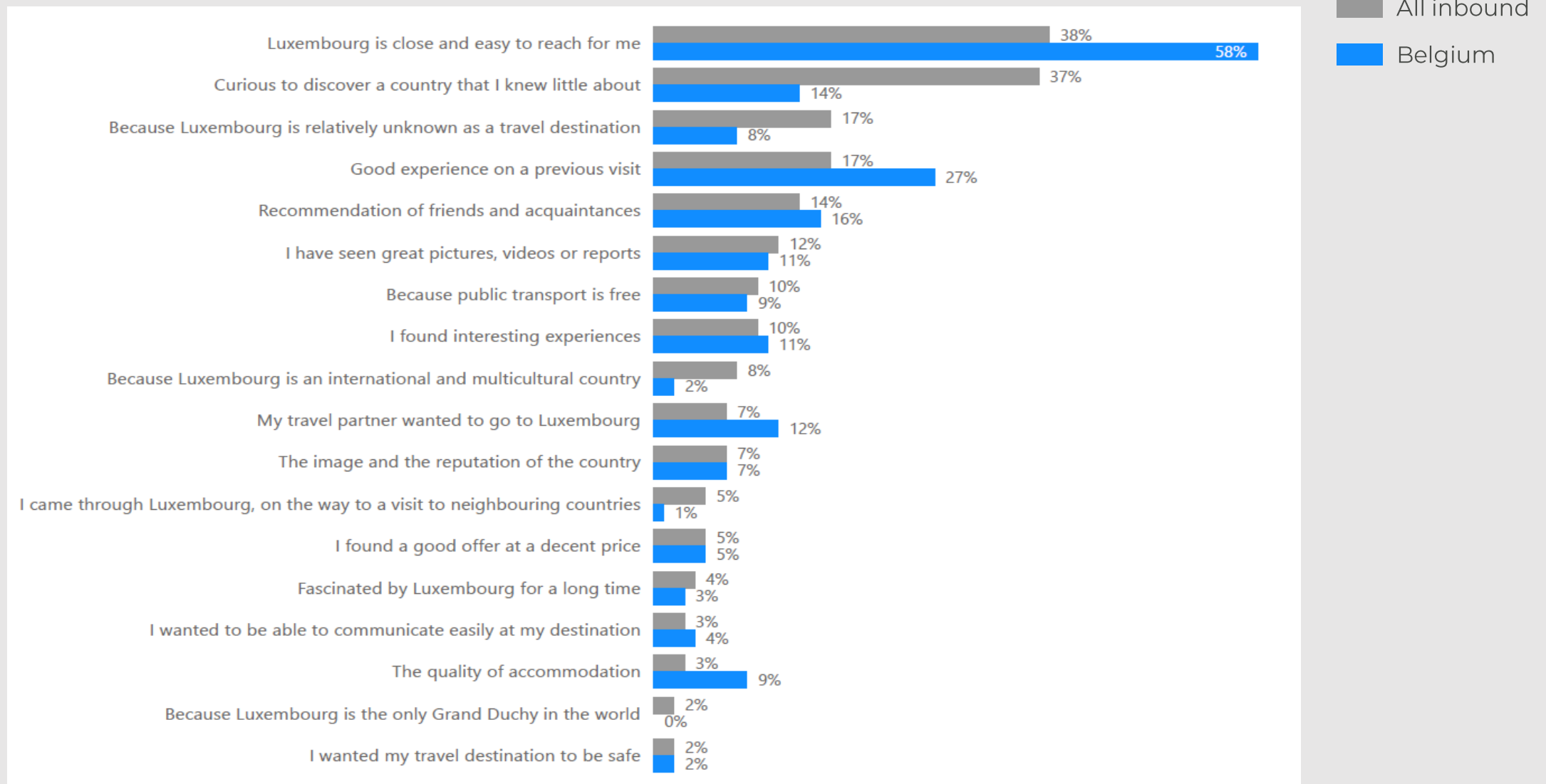
## Main purpose of overnight trip (if not holiday)

● All Inbound ● Belgium



# Key decision criteria for choosing Luxembourg

## Inbound leisure visitors with overnight (\*), 2023-2024

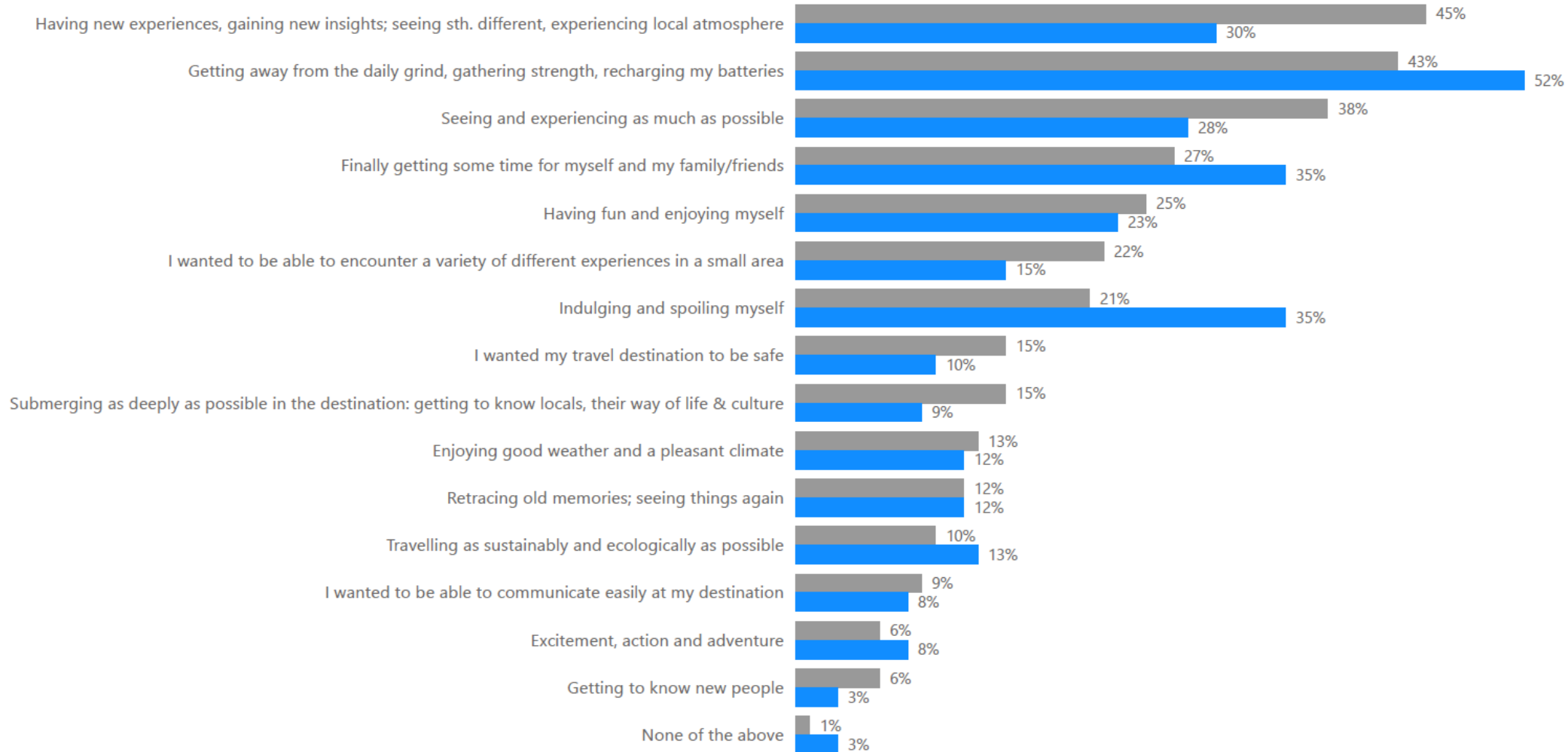


# Key travel motives

## Inbound leisure visitors with overnight, 2023-2024

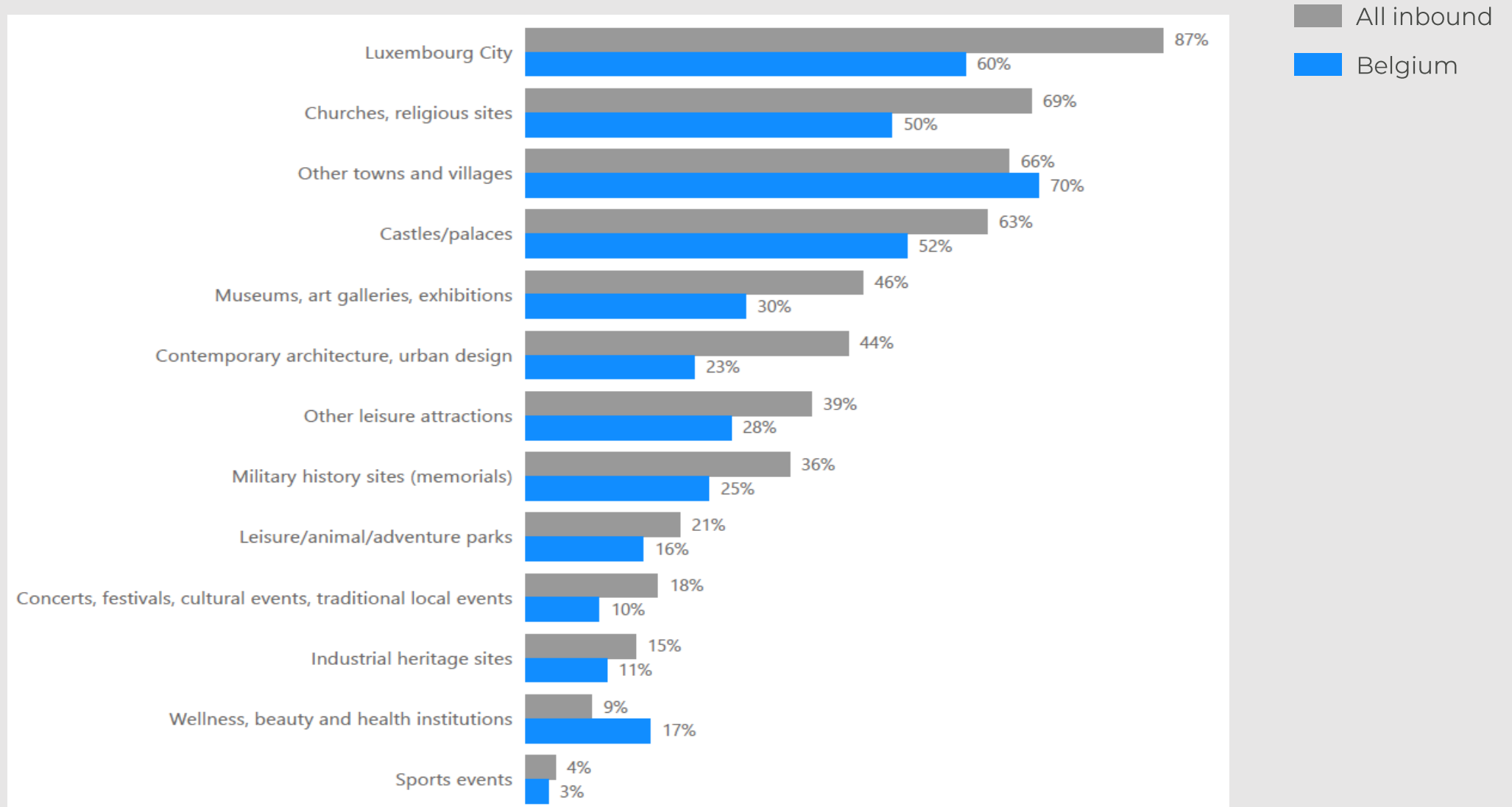


■ All inbound  
■ Belgium



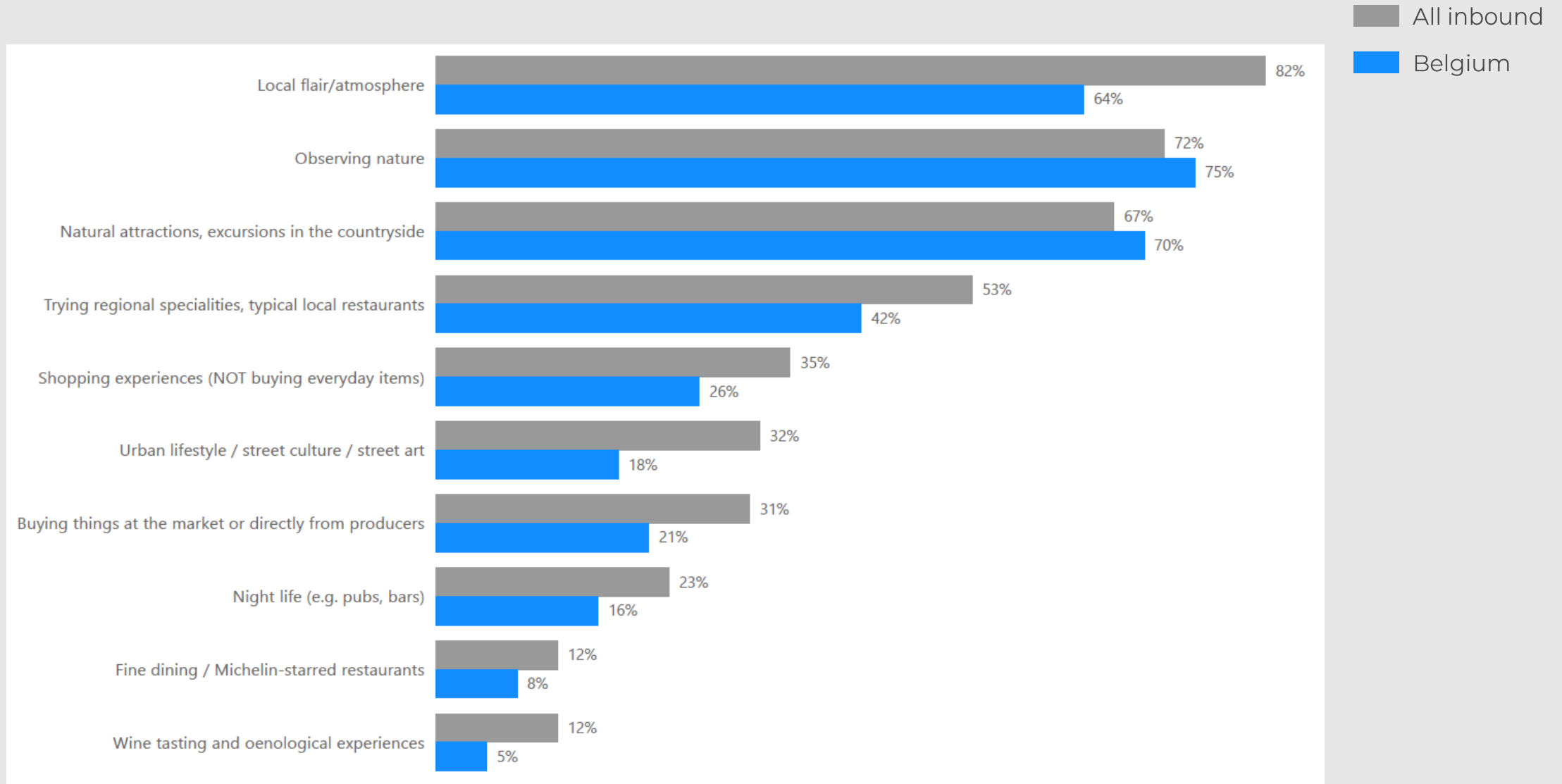
# Type of places visited in Luxembourg

## Inbound leisure visitors with overnight, 2023-2024



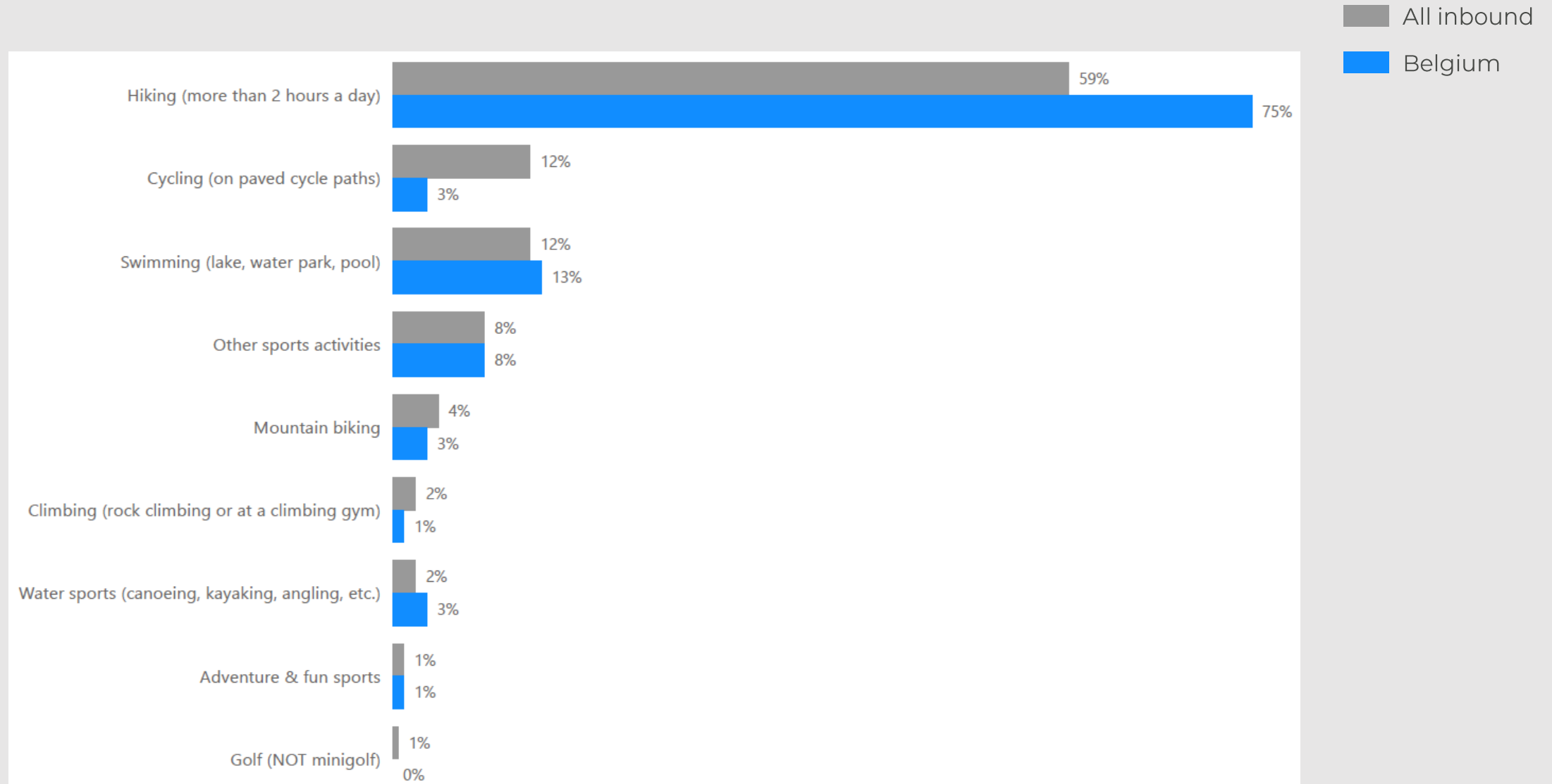
# Non-sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



# Sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



# Age groups

## Inbound leisure visitors with overnight, 2023-2024

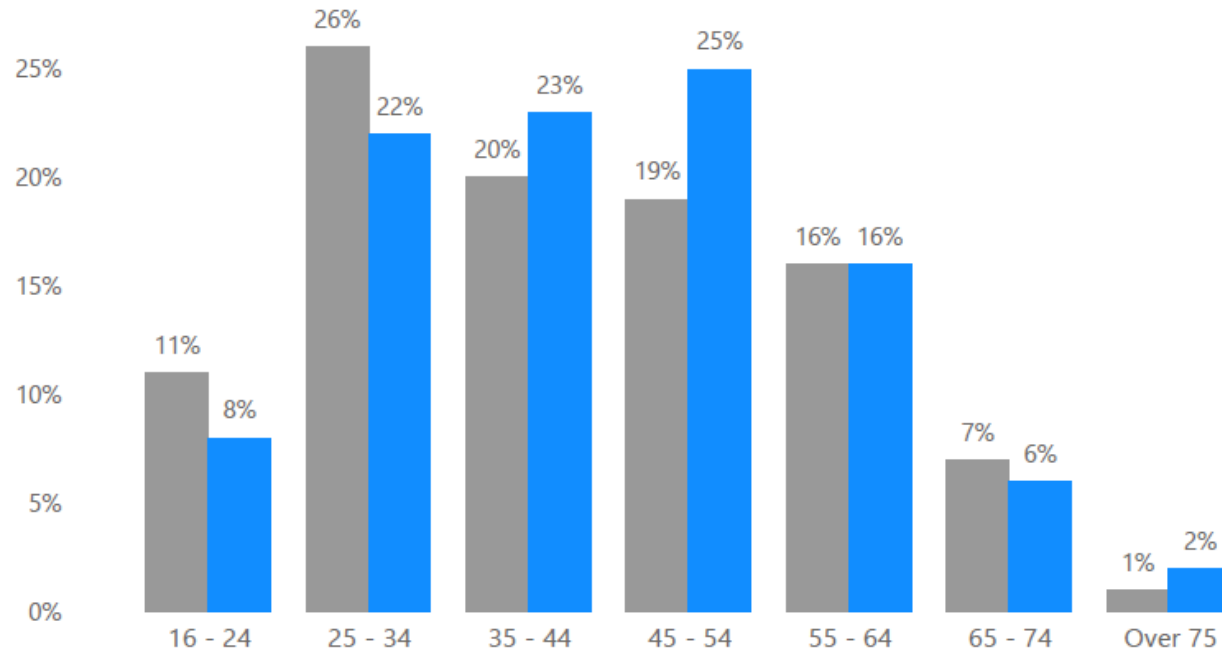


■ All inbound

■ Belgium

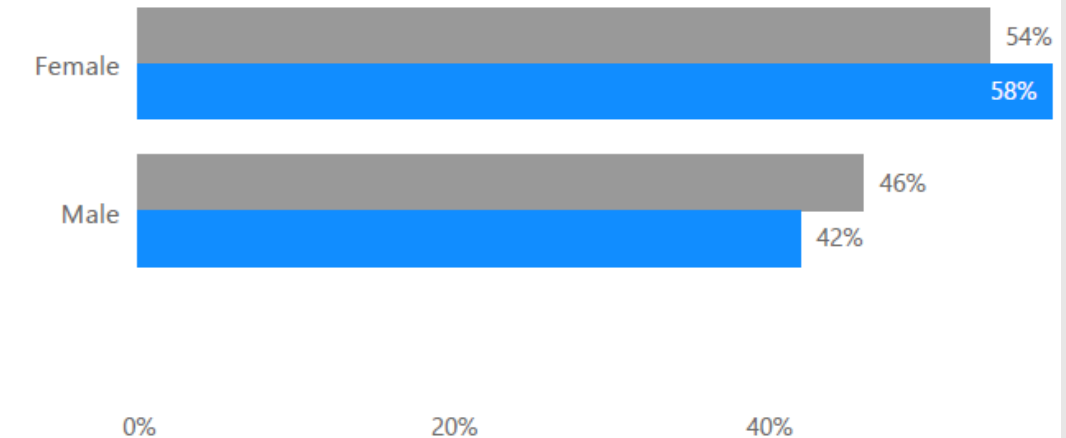
### Age

#### Visitors with overnight



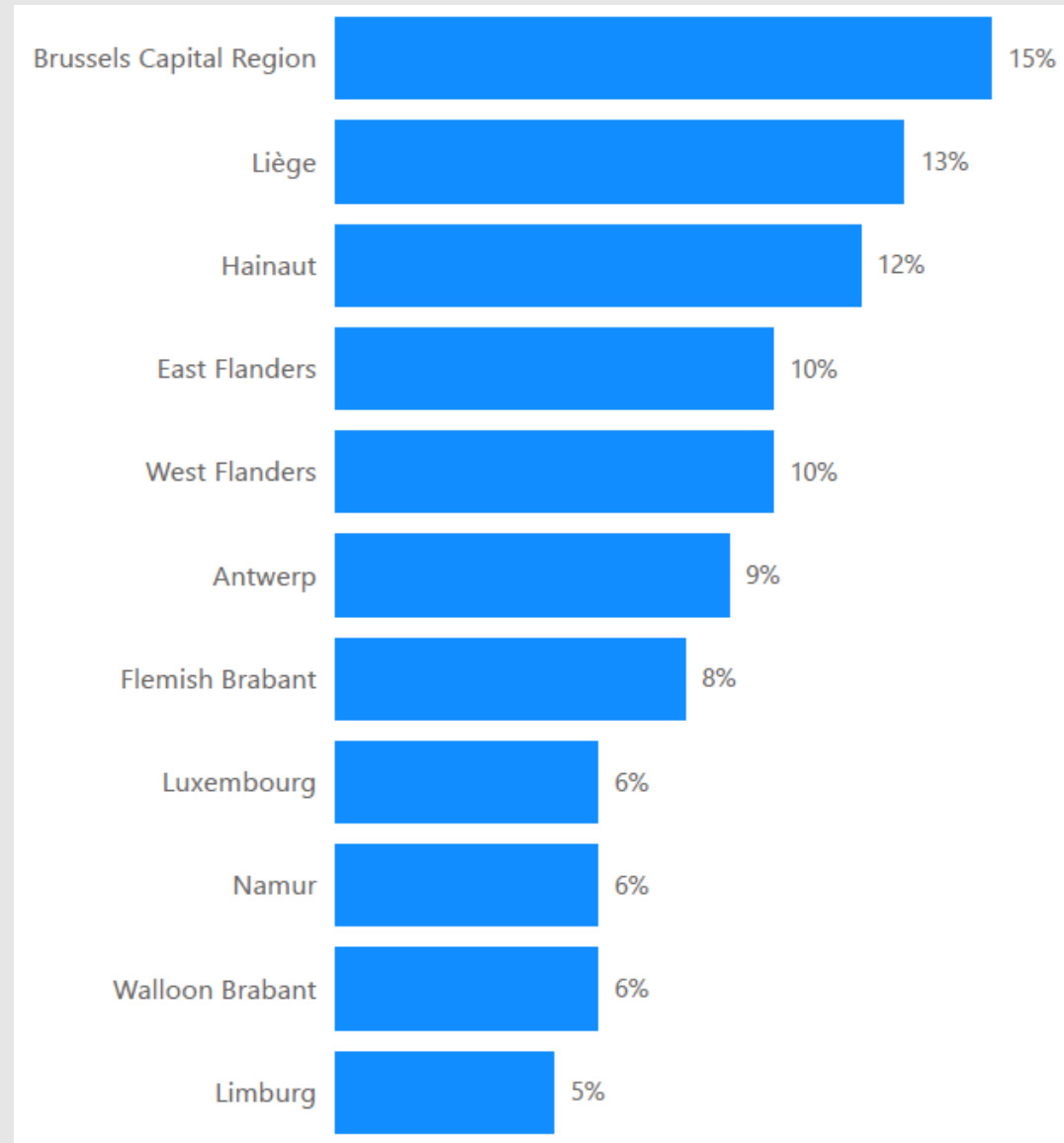
### Gender

#### Visitors with overnight



# Region of origin

Inbound leisure visitors with overnight, 2023-2024

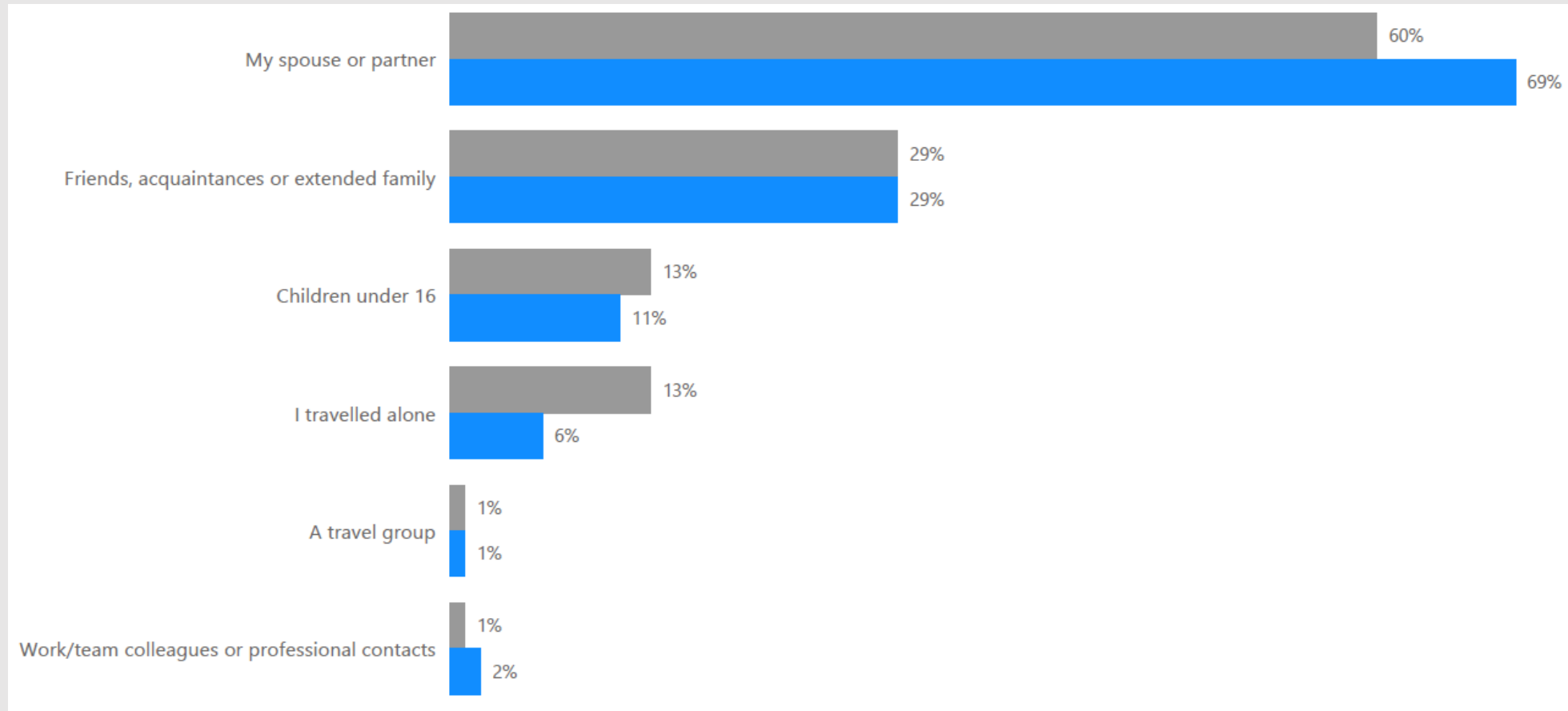


# Travel party

## Inbound leisure visitors with overnight, 2023-2024



■ All inbound  
■ Belgium



# Transport, new visitors and cross-border trips

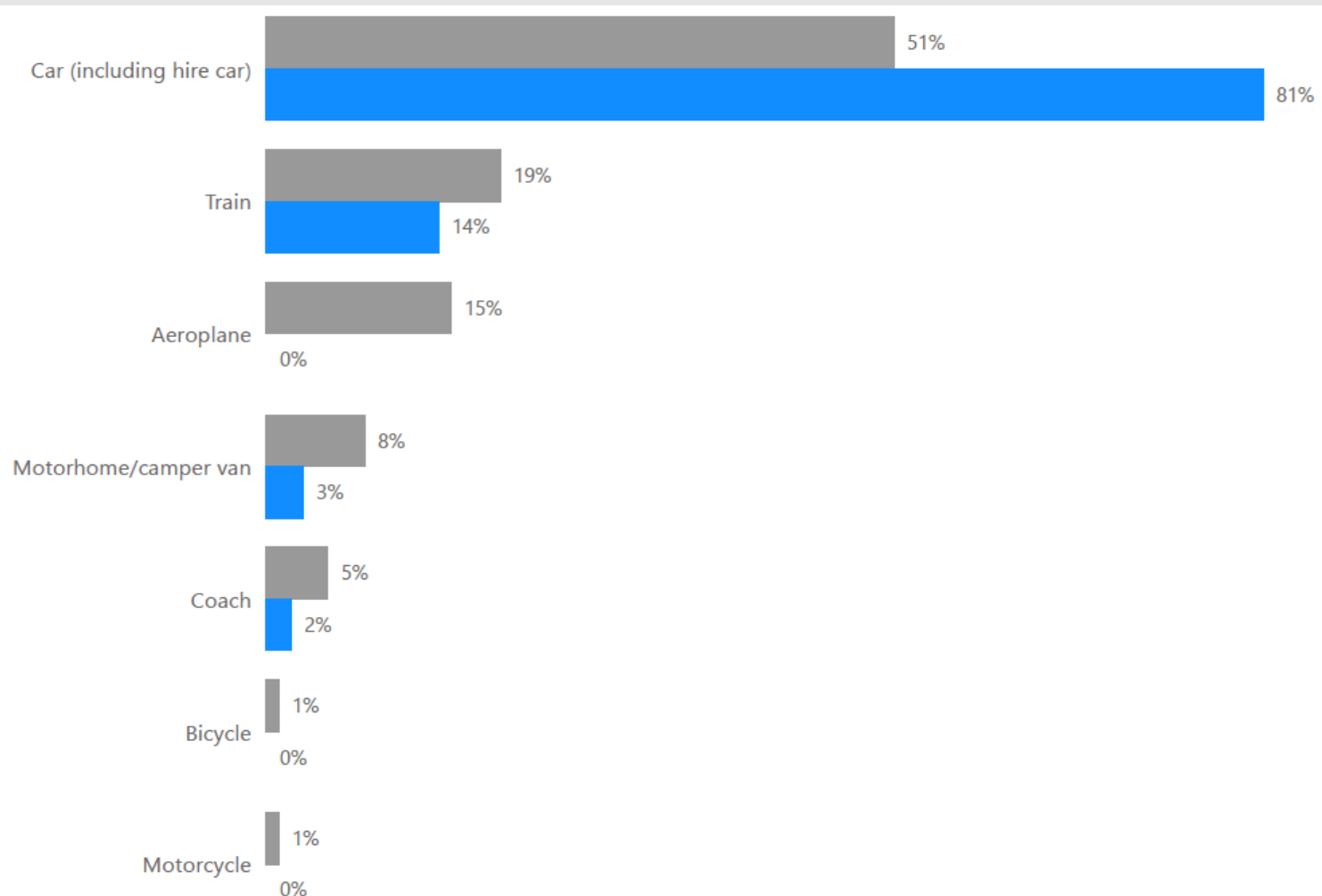
Inbound leisure visitors with overnight, 2023-2024



## Mode of transport to access Luxembourg

■ All inbound

■ Belgium



### First-time visitors

Visitors with overnight

**63%**

All Inbound

**44%**

Belgium

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

Visitors with overnight

**39%**

All Inbound

**23%**

Belgium

# Expenditure

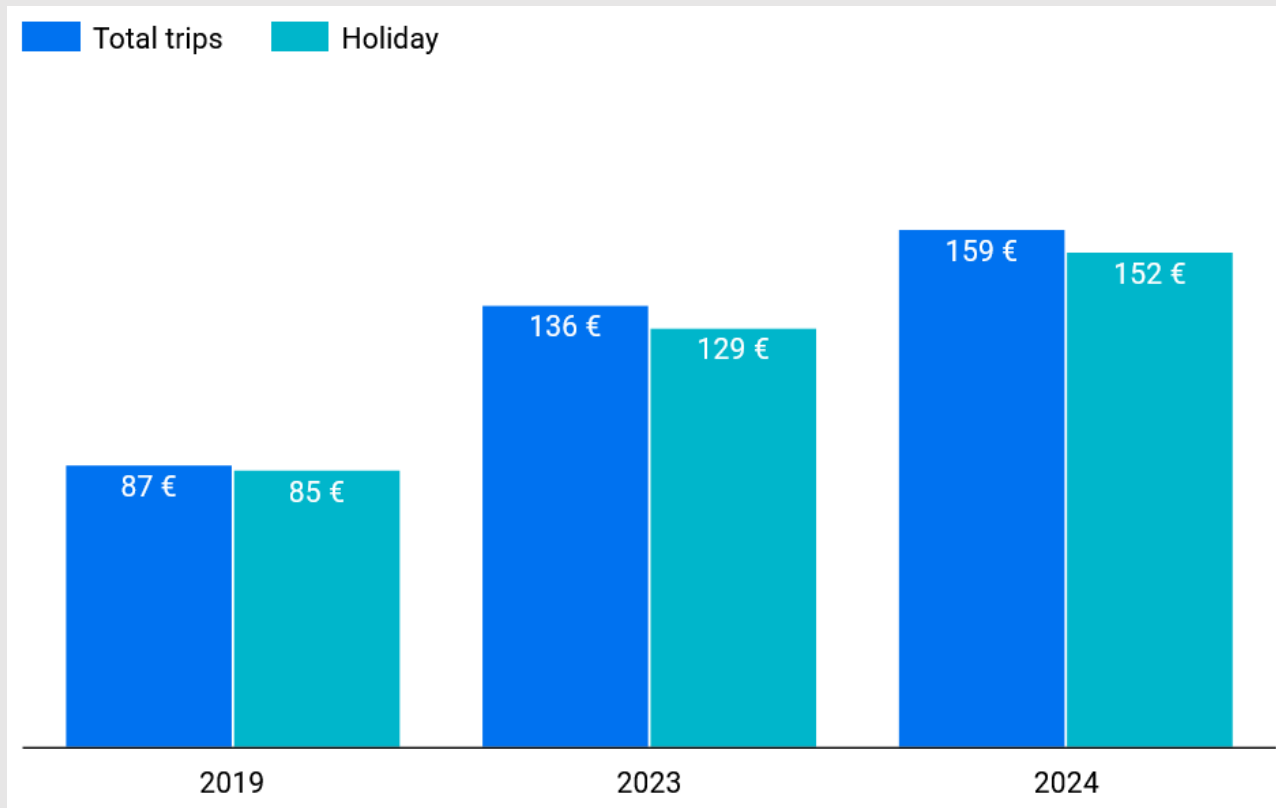
Inbound trips to Luxembourg with overnight (all accommodation)



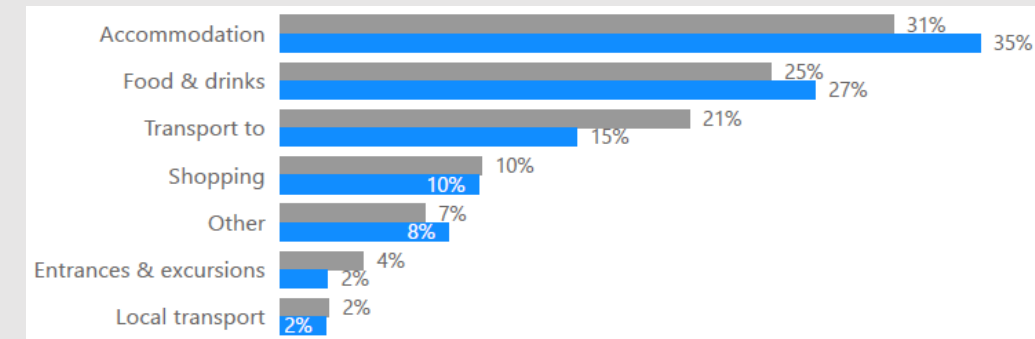
■ All inbound

■ Belgium

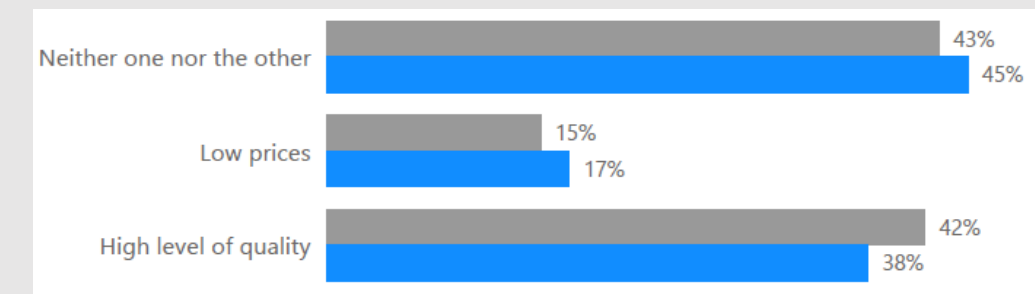
## Average expenditure/pers./day



## Expenditure of leisure inbound visitors by categories, 2023-2024

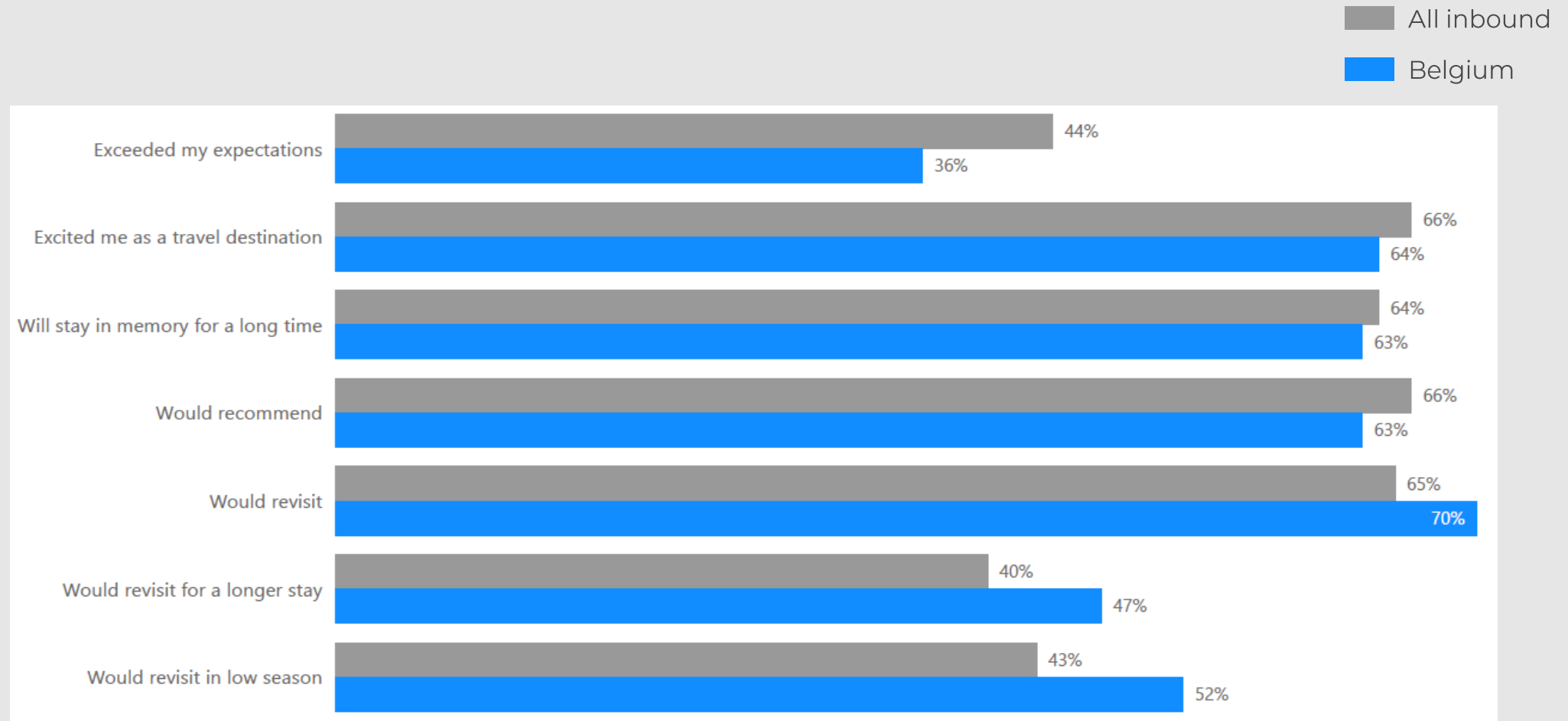


## Quality vs. price-orientation of leisure inbound visitors, 2023-2024



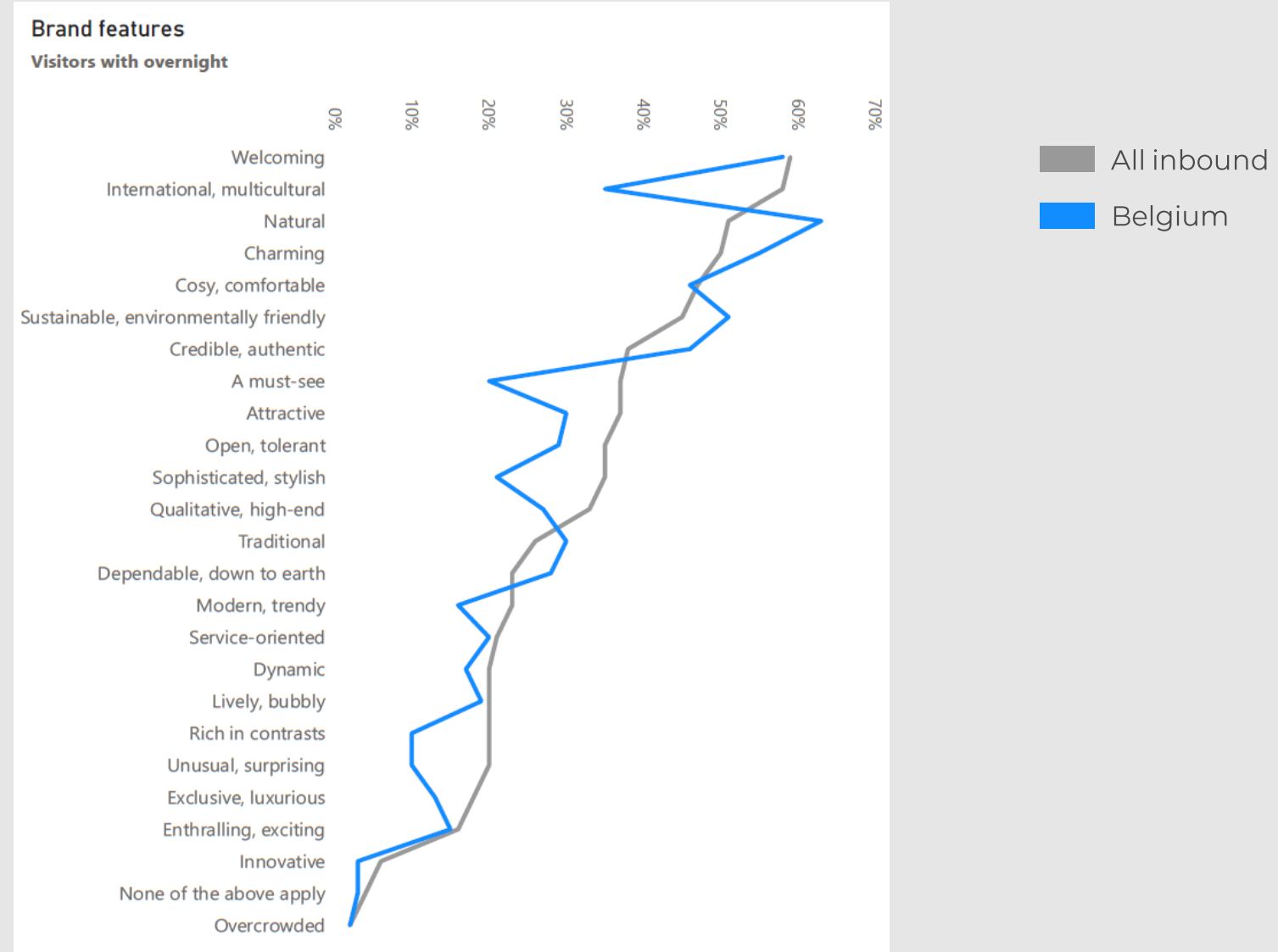
# Visitor satisfaction and recommendation

Inbound leisure visitors, 2023-2024



# Brand features perception

Inbound leisure visitors with overnights, 2023-2024



# LFT Target Segments



Belgium  
All inbound

Explorers



Nature-Loving Actives



Relaxation Seekers



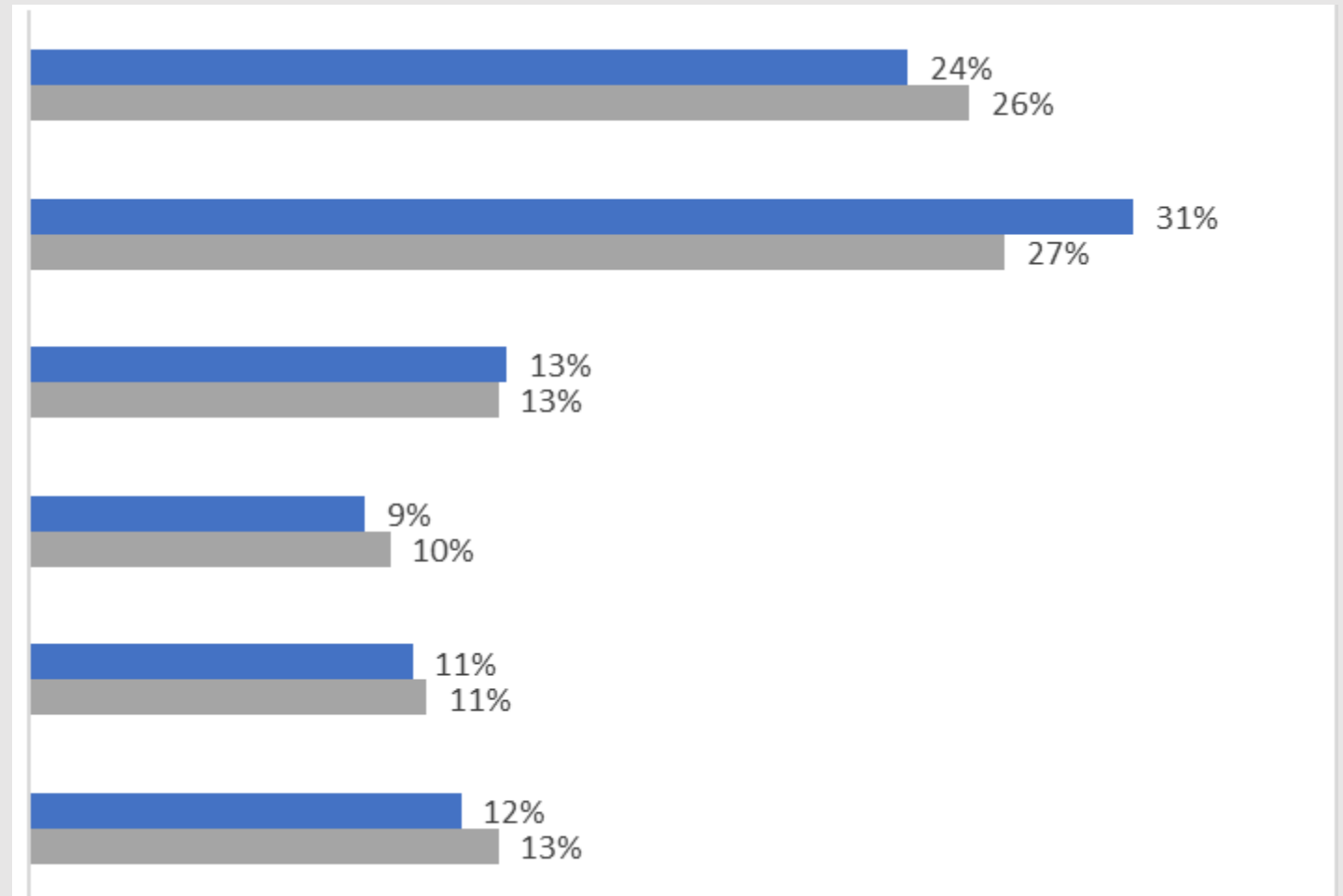
Short Breakers



Perfection Seekers



Leisure Oriented

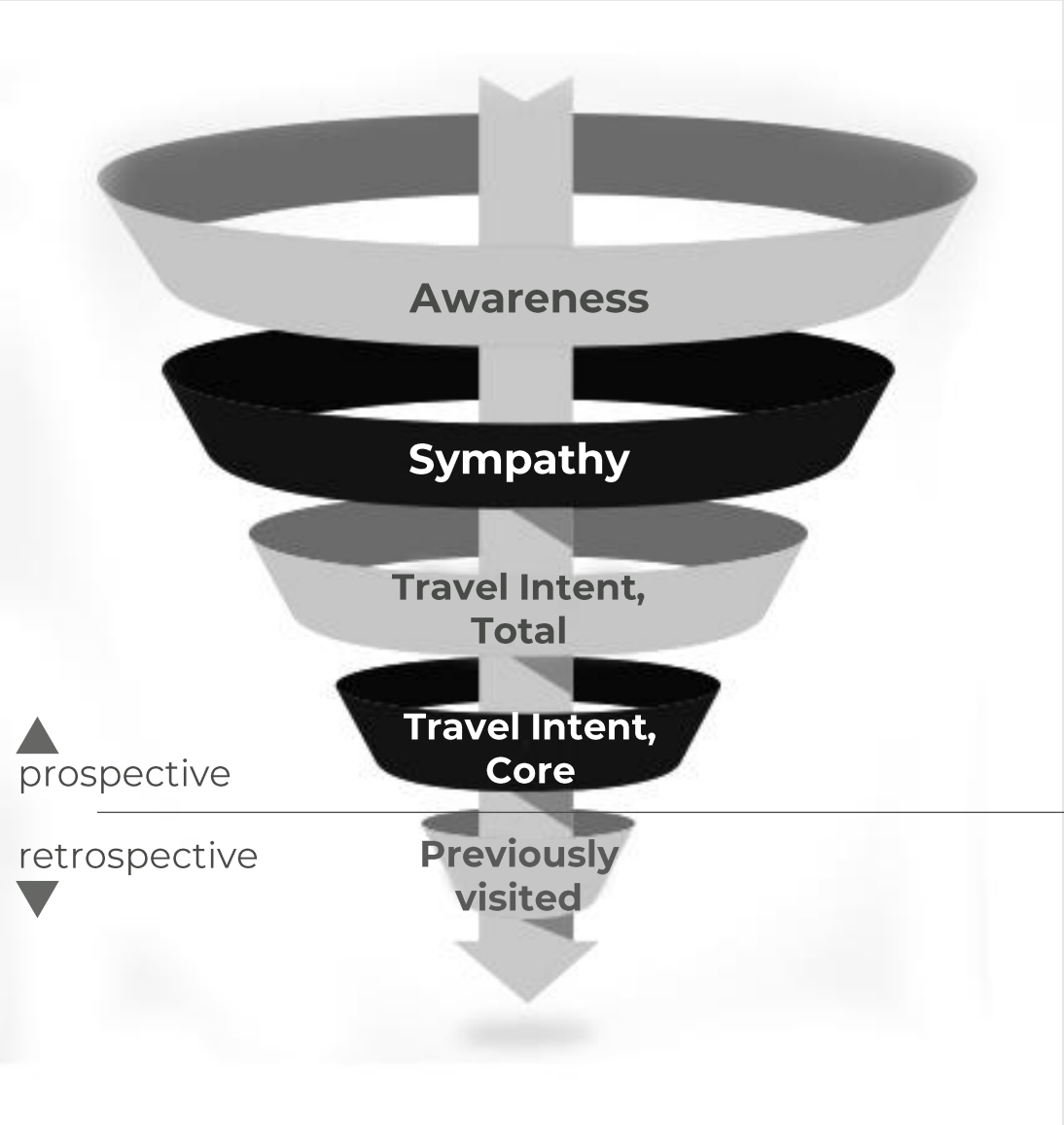




# **Target segments, Brand & Growth Potential**

# Destination Luxembourg - Brand Funnel 2024

Assessing Luxembourg's **brand strength** as a destination



88%

76%

67%

69%

46%

30%

20%

47%



82%

67%

55%

62%

34%

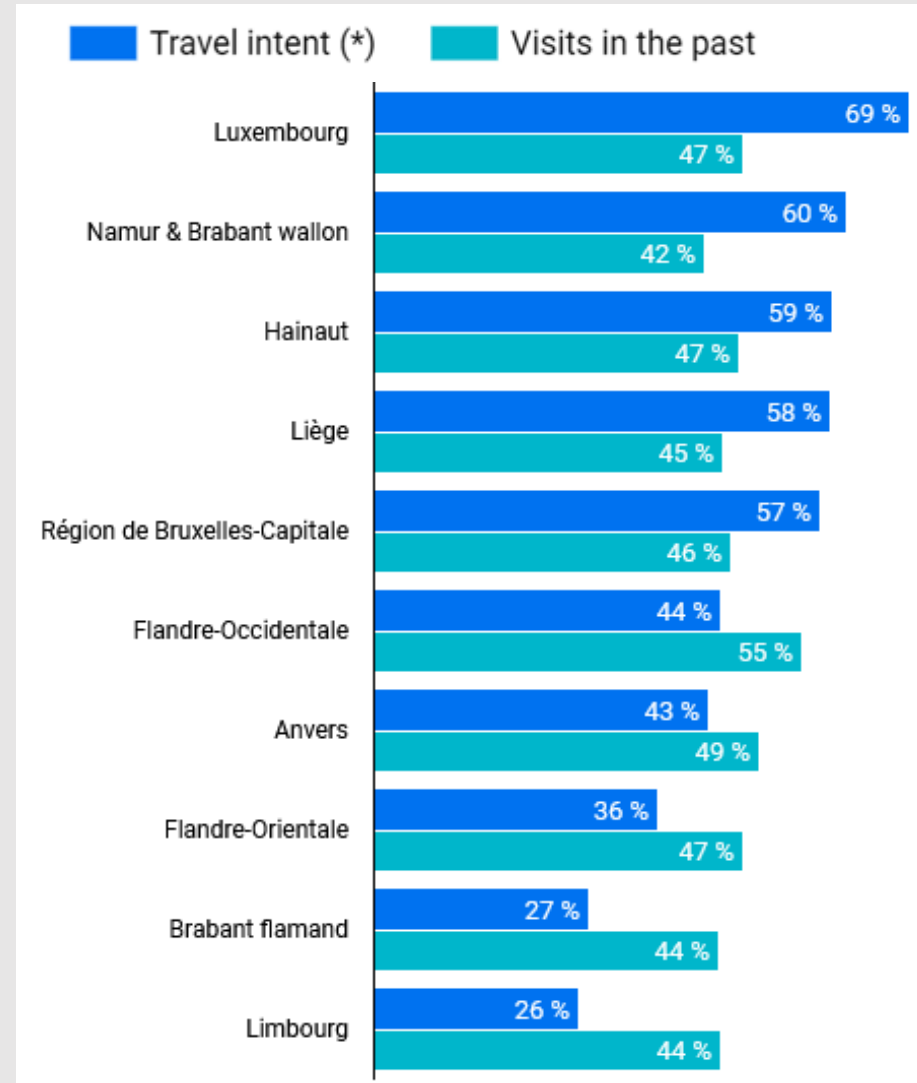
27%

15%

20%




# 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	55%
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	41%
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	26%
Culture	6	11	25%
Camping	19	12	25%
Wine	15	13	25%
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	1%
Remembrance	26	23	14%
Industrial heritage	24	24	14%
Nightlife (**)	14	25	12%
Events	23	26	12%

(\*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

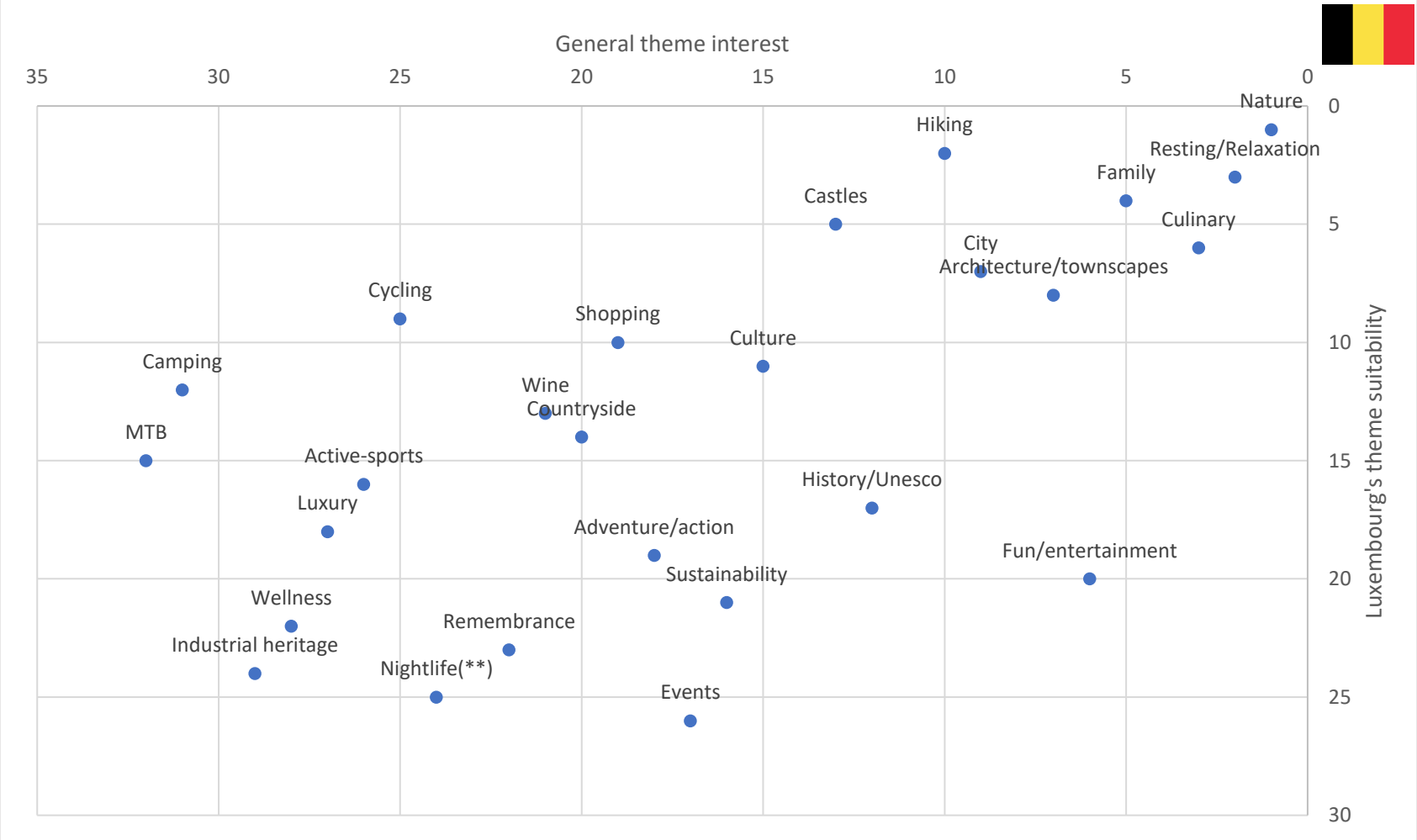
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

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

# Theme interest & Luxembourg's Theme Competence (\*)



Theme ranking by source market interest and Luxembourg's perceived suitability






(\*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

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

# Luxembourg's Brand Value Ratings (\*)



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

Source: LFT Brand & Potential Study, 2024.

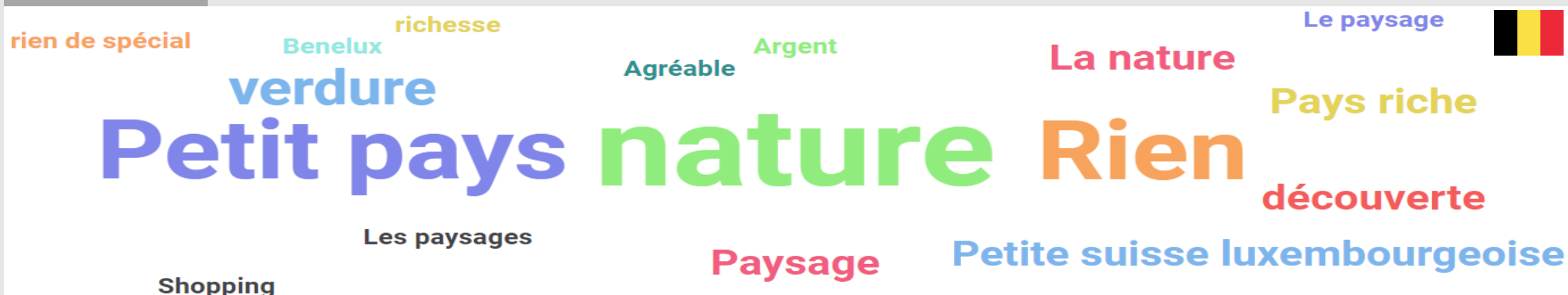
# Spontaneous associations with Luxembourg



## Vlaanderen



## Wallonie



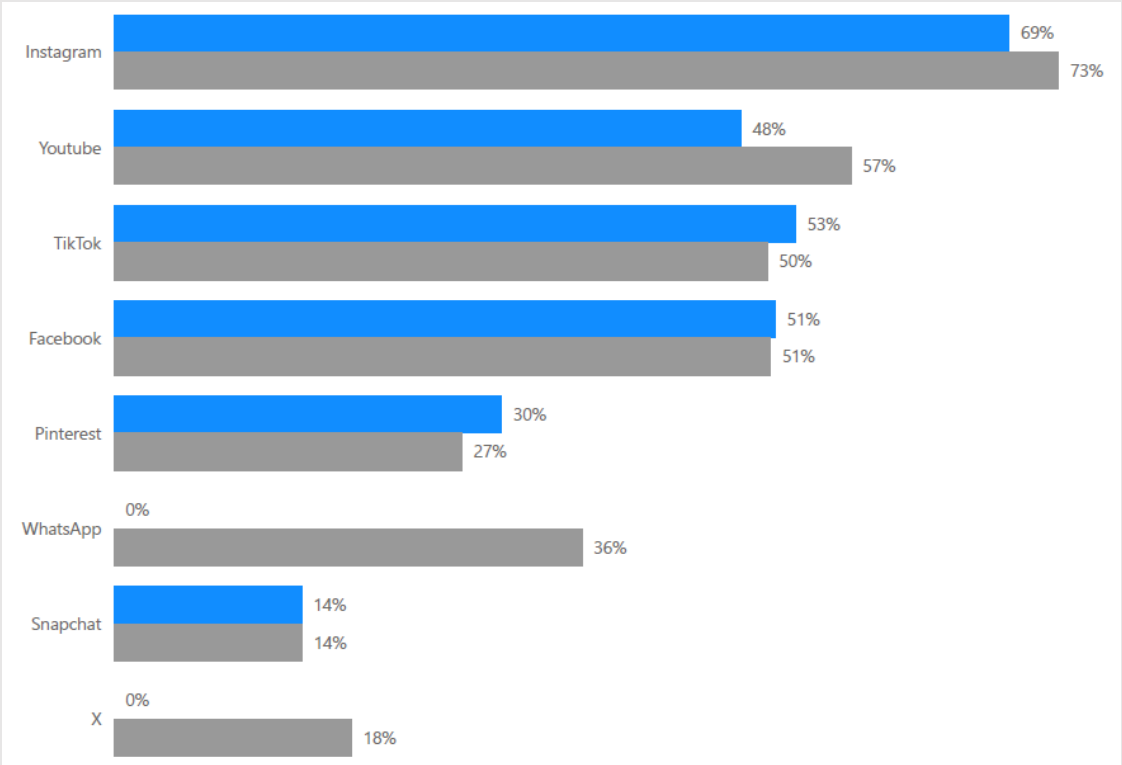
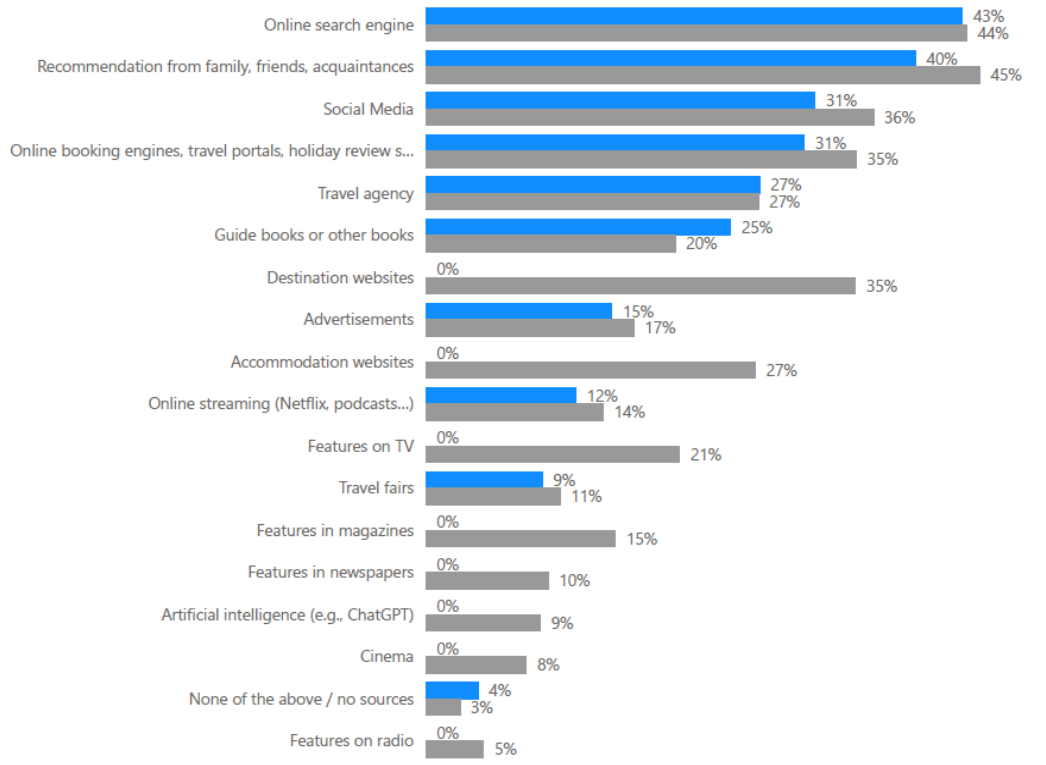
# Trip organisation and preferences (1)

— Average **European source markets**, total vs. Belgium

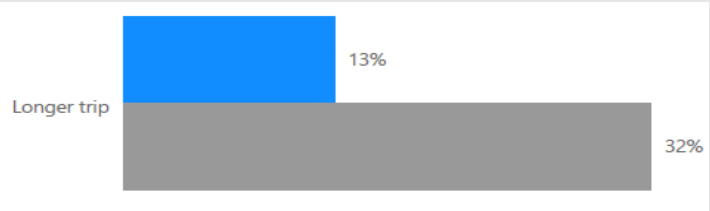


Belgium  
All inbound

## Preferred sources of travel inspiration



## Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent to Luxembourg)

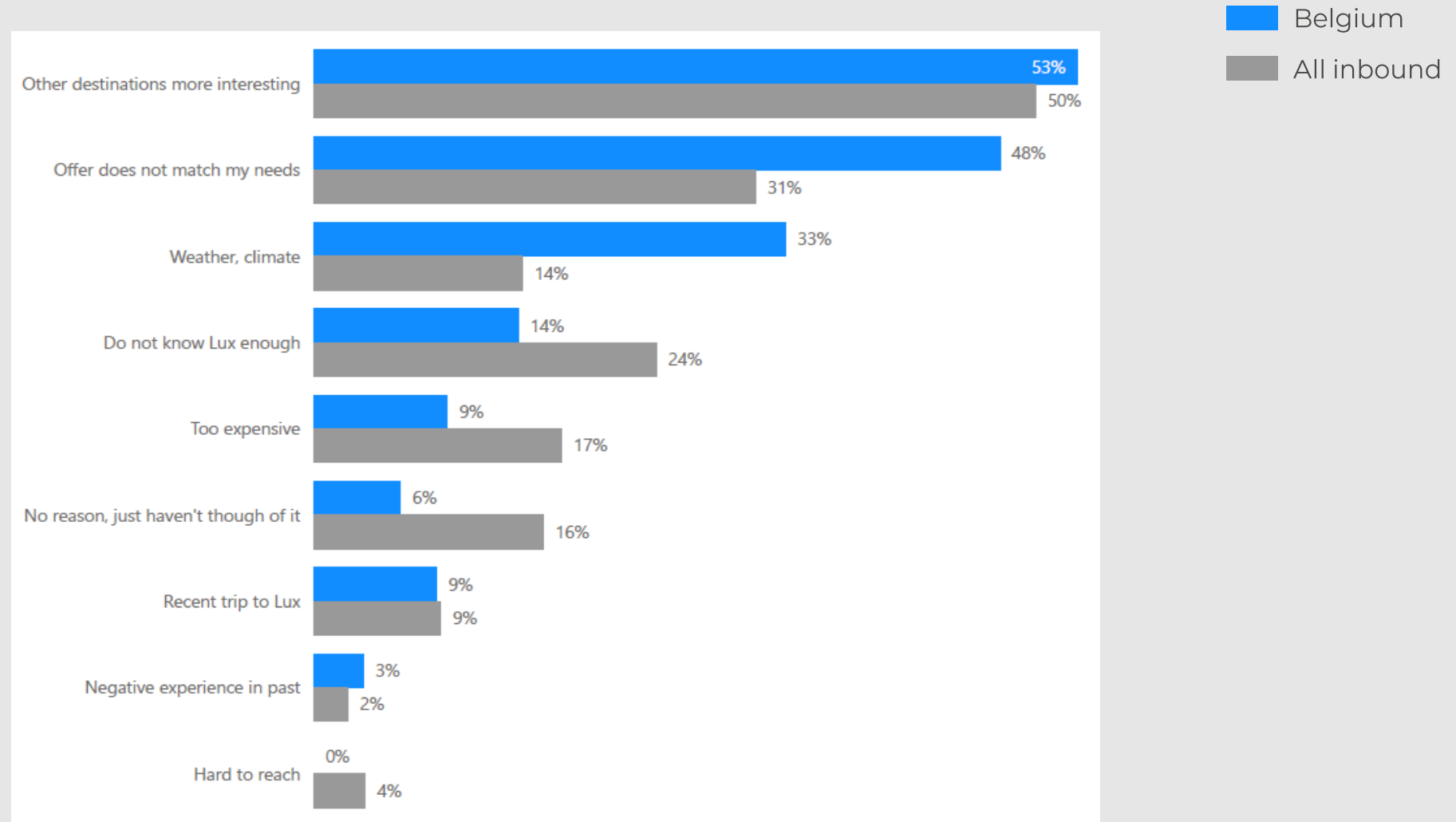


## Trip organisation and preferences (2)

— Average **European source markets**, total vs. Belgium



### Reasons for not considering Luxembourg as a destination

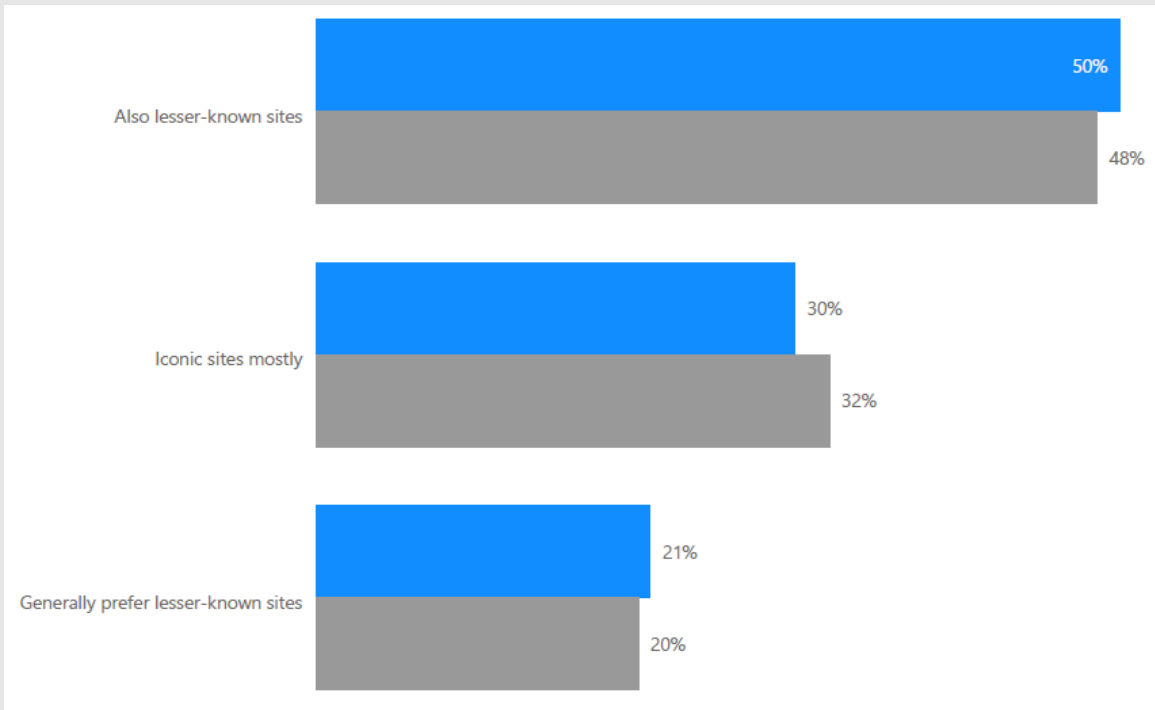


# Trip organisation and preference (3)

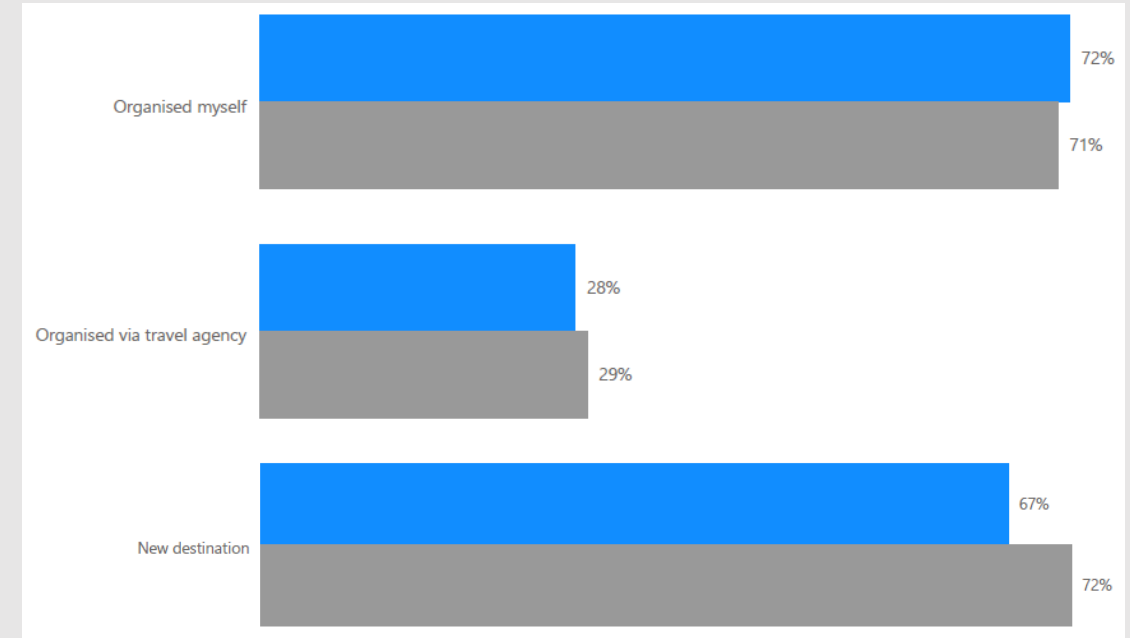
— Average **European source markets**, total vs. Belgium



## General preference for visiting iconic vs. lesser-known sites



## Self-organisation (\*), new destination (\*\*)



■ Belgium  
■ All inbound

(\*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



# Your contact



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